



Service Cloud

Salesforce, Summer '18



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SERVICE CLOUD

Give your customers the information and support they need with Service Cloud—the customer service and support application that you can customize to fit your business needs. With Service Cloud, you can choose how your customers reach you, whether it's email, phone, social media, online communities, or chat. To keep your customers satisfied when they do contact you, Service Cloud makes sure that your agents have all the tools they need to respond to customer cases efficiently.

Service Cloud lets you boost agent productivity, communicate on multiple channels, and solve issues in the field.



Don't forget to check out our Service Cloud trails.

- [Get Started with Service Cloud for Lightning Experience](#)
- [Keep Customers Happy with Service Cloud](#)
- [Discover Advanced Service Cloud Features](#)
- [Get on the Road with Field Service Lightning](#)

IN THIS SECTION:

[Get Started with Service Setup](#)

The Service Console comes with Service-specific setup flows that help you get up and running quickly. These flows walk you through setting up Email-to-Case, integrating with Twitter and Facebook, creating a Lightning Community, and enabling Lightning Knowledge, Omni-Channel, and Live Agent.

[Service Cloud Case Management](#)

Set up the Service Cloud basics for case management to meet your business needs. Customize your automation process for cases—such as assignment and escalation rules. Entitlement management ensures that the correct support is always provided to your customers. Knowledge lets you share articles and information with your customers. To keep everything moving, Omni-Channel routes cases to your agents.

[Service Cloud Channels](#)

Service Cloud's support channels offer many ways—phone, email, web chat, social network channels, and more—that your customers can use to contact you. Today's customers are used to being digitally connected and easily communicating with their friends, families, and coworkers. They expect the same from the companies they do business with. Make it easier for customers to connect with your company how and when they want. Set up a mix of channels based on your business needs and customer preferences.

[Salesforce Knowledge](#)

Give your website visitors, clients, partners, and service agents the ultimate support tool. Salesforce Knowledge lets you create and manage a knowledge base with your company information and securely share it when and where it's needed.

[Einstein Bots for Service Cloud](#)

Build and manage Einstein Bots to ease the load on your service agents. Bots can handle routine requests and free your agents to handle more complex issues. Bots can also gather pre-chat information to save your agents time.

[Field Service Lightning](#)

Field Service Lightning is a powerful, customizable set of features that you can use to set up a mobile-friendly field service hub in Salesforce.

[More Service Cloud Features](#)

Locate documentation for earlier versions of Service features we've upgraded.

[Service Cloud Printed Resources](#)

In addition to online help, the Service Cloud has guides to help you learn about and successfully administer your Service Cloud features.

SEE ALSO:

[Customer Service Features: What's Different or Not Available in Lightning Experience](#)

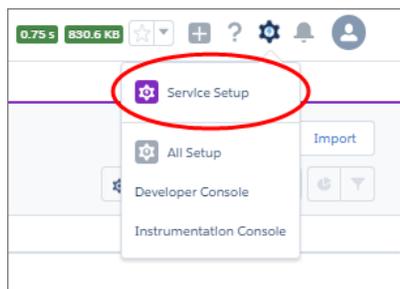
[Customer Service Features: What's Different or Not Available in the Salesforce Mobile App](#)

Get Started with Service Setup

The Service Console comes with Service-specific setup flows that help you get up and running quickly. These flows walk you through setting up Email-to-Case, integrating with Twitter and Facebook, creating a Lightning Community, and enabling Lightning Knowledge, Omni-Channel, and Live Agent.

Lightning Service Setup features an intuitive setup tree and a performance metrics dashboard. If you want a guided step-by-step experience, use the Recommended Setup or the setup flows.

In the header, click  and then select **Service Setup**.



The Service Setup home page is displayed. Here are some things you can do from the home page.

Service Setup Tree

This setup tree is a subset of the regular Salesforce setup tree. Not all Service-related setup nodes are exposed in the Service Setup tree.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up a Lightning Service Console:

- Customize Application
AND
Service Cloud User

 **Important:** Any changes you make from setup pages listed in the Service Setup tree affect your Salesforce Classic settings, and vice versa.

Performance

To monitor your service metrics, use the reports on the Service Setup home page. You can see how your email and social channels are doing, analyze call center spikes, and view up-to-the-minute caseload stats.

Recommended Setup

See recommended setup flows, content, and tips based on what you've set up already. Click **View All** to see all the available content. Or, learn about the power of Service Cloud and get plugged into the Salesforce community.

Customize Case Status

Currently, there is no API to query inactive statuses. Any case status that is left inactive in the Custom Case Status display is removed from the list when you click **Finish**.

If you want to restore the inactive case statuses, first switch over to Salesforce Classic. Go to **App Setup** and search for **Customize**. Drill down to **Cases** and then **Fields**. Scroll down to the Inactive Values menu and deselect the values of interest. When you go back to Customize Case Status in Lightning Service Setup, the values are restored.

Guided Setup Flows

Guided setup flows let you set up Service Cloud features faster. Some setup flows may be recommended to you in Recommended Setup, or you can click **View All** to access all the available setup flows.

SEE ALSO:

[Set Up Lightning Communities with a Guided Setup Flow](#)

[Set Up Email-to-Case with a Guided Setup Flow](#)

[Set Up Lightning Knowledge with a Guided Setup Flow](#)

[Set Up Live Agent with a Guided Setup Flow](#)

[Set Up Omni-Channel with a Guided Setup Flow](#)

[Set Up Social Customer Service with a Guided Setup Flow](#)

Service Cloud Case Management

Set up the Service Cloud basics for case management to meet your business needs. Customize your automation process for cases—such as assignment and escalation rules. Entitlement management ensures that the correct support is always provided to your customers. Knowledge lets you share articles and information with your customers. To keep everything moving, Omni-Channel routes cases to your agents.

IN THIS SECTION:

[Configure General Support Settings](#)

Set up business hours and support holidays for your organization. You can also update settings to make your support processes more efficient.

[Set Up and Manage Cases](#)

Cases are the backbone of Service Cloud. Cases let you respond to and solve customer issues. Cases are powerful records in Salesforce that not only track customer issues, but also show a complete view of the customer. Customize cases to fit your business needs and ensure that your customers always receive the best service.

[Set Up Rules and Queues](#)

Automation keeps things running smoothly. Set up rules and queues to help you prioritize, distribute, assign, respond to, and escalate records.

[Set Up and Manage Entitlements and Milestones](#)

Give your customers the level of support you've promised them. Entitlement management lets you define, enforce, and track customer service levels as part of your support management process.

[Set Up and Manage Assets](#)

Keep tabs on the products that your customers buy. Assets represent purchased or installed products, and are an essential piece of the Salesforce puzzle. You can link assets to maintenance plans, entitlements, work orders, and more so your support team can quickly assess the history of a customer's product.

[Set Up Routing with Omni-Channel](#)

Omni-Channel routes work requests to the most available and qualified support agents in the console. You can also provide real-time operational intelligence to support supervisors with Omni-Channel Supervisor.

[Service Cloud for Mobile](#)

Service Cloud Mobile is the future of customer service on the go. This mobile app is available on both iOS and Android devices. The app gives you real-time access to the same case and queue information that you see on the console, but organized for getting work done from your mobile device.

[Set Up and Work with Service Console](#)

The Service Console app provides agents a full view of each customer case and gives them the tools to resolve each case quickly. Use the console app to view multiple records and their related records on the same screen, and work through records from a list using split view.

[Work with Service Cloud Productivity Tools](#)

Service Cloud offers productivity tools that save your agents time. Quick text lets agents insert predefined text, like notes, messages, and more. Macros lets agents be super users and complete repetitive tasks in one click.

[Report on Support Activity](#)

Use support reports to track the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of cases.

Configure General Support Settings

Set up business hours and support holidays for your organization. You can also update settings to make your support processes more efficient.

To enable and configure Service Cloud feature, head over to Setup.

IN THIS SECTION:

[Customize Support Settings](#)

Support settings can help you automate case management. Choose email templates, default case owner, case notifications, and more.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

The available support setup options vary according to which Salesforce Edition you have.

[Set Business Hours](#)

Specify the hours when your support team is available to serve customers. This helps make your department's processes, such as escalations and milestones, more accurate.

[Set Up Support Holidays](#)

Holidays let you specify the dates and times your customer support team is unavailable. After you create a holiday, you can associate it with business hours to suspend business hours and escalation rules during holiday dates and times.

SEE ALSO:

[Tip Sheet: Setting Up Customer Support](#)

[Tip Sheet: Getting the Most from Your Self-Service Portal](#)

[Self-Service Implementation Guide](#)

[Case Management Implementation Guide](#)

Customize Support Settings

Support settings can help you automate case management. Choose email templates, default case owner, case notifications, and more.

From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings** and click **Edit**.

Setting	Description
Default Case Owner	Automatically assign a user or queue to all cases that don't match any case assignment rule entries. This user must be <i>Active</i> .
Notify Default Case Owner	Notify the default case owner when a case is assigned to him or her. If the new owner is a queue, the notification is sent to the queue email address. Notifications are system-generated and can't be modified.
Record Type Setting	Indicates which record type to assign to cases created by users applying assignment rules. Select either: <ul style="list-style-type: none"> Keep the existing record type if you want new cases to keep the creator's record type Override the existing record type with the assignee's default record type if you want to overwrite the creator's record type on new cases
Automated Case User	Specify the user you want listed in the case feed items and Case History related list for automated case changes. Automated case changes can occur from assignment rules, escalation rules, On-Demand Email-to-Case, or cases logged in the Self-Service portal. Select either: <ul style="list-style-type: none"> <i>System</i> to indicate that an automated process performed an action, such as creating a case or changing a case's status. When you select <i>System</i>, the lookup field is grayed out. <i>User</i> to use the lookup field to specify a user, such as an administrator, to be the Automated Case User. This user must have

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To change support settings:

- Customize Application

Setting	Description
	the System Administrator profile or the Modify All Data and Send Email permissions.
Case Creation Template	<p>Specify the template used to notify contacts that their case was created manually by a support agent. The notification is optional; it's triggered by a checkbox on the case edit page. This template must be <code>Available for Use</code>.</p> <p>In Lightning Experience, to display the send notification checkbox, you must specify a template for this setting.</p>
Case Assigned Template	Specify the template used to notify users that a case was manually assigned to them by an administrator or another user. The notification is optional; it's triggered by a checkbox on the Change Case Owner page. This template must be <code>Available for Use</code> .
Case Close Template	Specify the template used to notify contacts that a case has been closed. The notification is optional; it's triggered by a checkbox on the Close Case page. This template must be <code>Available for Use</code> .
New Cases Visible in Portal	<p>Automatically selects the <code>Visible in Self-Service Portal</code> checkbox for all new cases, including cases created via Web-to-Case, Email-to-Case, and On-Demand Email-to-Case.</p> <p>Regardless of this default, users creating new cases can manually set the <code>Visible in Self-Service Portal</code> checkbox.</p> <p>If you're using Salesforce Communities, this setting does not apply for partner or customer users viewing cases in communities. New case visibility in communities is controlled by sharing rules.</p>
Enable Case Comment Notification to Contacts	Notify contacts when a case comment has been modified or added to a case. If you select this setting, click <code>Case Comment Template</code> and choose the email template to use for these notifications. This template must be <code>Available for Use</code> . Emails can't be sent to contacts that are Self-Service portal users.
Notify Case Owner of New Case Comments	<p>Notify the case owner when a user adds a public or private comment to a case. If you select this setting, case owners can't opt out of receiving these notices. Notices aren't sent to inactive case owners.</p> <p>In Lightning Experience, email notifications aren't sent when agents use in-line edit on the case record detail page to update the Internal Comments field.</p>
Early Triggers Enabled	<p>Enable early triggers for escalation rules and their actions.</p> <p>You can set up an escalation rule to perform an action when a case has been unresolved for a specific number of hours. The <code>Age Over</code> hour you specify determines when Salesforce performs the escalation action. Enable early triggers to ensure that your escalation actions are triggered before the <code>Age Over</code> hour you specify.</p>
Enable Suggested Solutions	Enable the Suggested Solutions button on case detail pages so agents can propose specific solutions to help resolve cases.
Enable Suggested Articles	Provide suggested articles on the Articles related list. You can make suggested articles available in all Salesforce Knowledge channels except the public knowledge base.

Setting	Description
Send Case Notifications from System Address	<p>Use a system address, rather than the address of the user who updated the case, for case notifications for case comments, attachments, and assignment.</p> <p>System notifications display a <code>From</code> email address of "noreply@salesforce.com", and an email <code>Subject</code> related to the message, such as "Case Comment Notification."</p> <p>This setting helps prevent Self-Service or Customer Portal users who update their cases from receiving out-of-office emails from case owners.</p>
Notify Case Owners when Case Ownership Changes	<p><i>Automatically</i> select the <code>Send Notification Email</code> checkbox on cases when users change a case owner to another user. This setting helps prevent users from forgetting to notify other users that they're the new owner of a case. Agents can still select the send notification checkbox even if you don't enable this setting.</p> <p>In Salesforce Classic, selecting this option <i>doesn't</i> automatically select <code>Send Notification Email</code> when users change a case owner to a queue. However, in Lightning Experience, if you select this option, the checkbox is always automatically selected for user and queue changes.</p>
Show Closed Statuses in Case Status Field	<p>Add closed statuses to the <code>Status</code> field on cases so that agents can close cases without having to click the Close Case button and update information on close case page layouts.</p> <p>Selecting <code>Show Closed Statuses in Case Status Field</code> doesn't remove the Close button from case list views. Instead, it adds <code>Closed</code> to the list of statuses available for users to choose from when they select multiple cases and click Change Status on case list views.</p>
Hide Save & Close Button and CIs Links	<p>After selecting <code>Show Closed Statuses in Case Status Field</code> as described above, you can select this checkbox so that the <code>Save & Close</code> button on case edit pages and CIs links on Cases related lists don't display unnecessarily. Instead, users close cases via the <code>Status</code> field and Save button.</p>
Enable Case Feed Actions and Feed Items	<p>Enables case feed-specific actions and feed items. When you select this option, existing cases are upgraded to the case feed user interface.</p>
Size of Email Feed Item Body	<p>Control the size of email feed items by setting a character limit on the email feed item body. You can set the character limit to:</p> <ul style="list-style-type: none"> • Small: 400 characters (default) • Medium: 1200 characters • Large: 5000 characters • Custom: A value from 400 through 5000 characters <p>If an email feed item body exceeds the character limit, users can click More to see the rest of the email feed item body.</p>
Blank Lines in Email Feed Item Body	<p>Save space in the case feed by removing blank lines in the body of email feed items.</p>
Collapse Previous Emails in Email Feed Item Body	<p>Display only the most recent email in the email feed item body. Users can click More to see previous emails in the thread.</p>

Setting	Description
Enable Default Email Templates or the Default Handler for Email Action	Use an Apex class to load a default email template or to specify the default target fields for the email action on cases.
Enable Email Drafts	Enables email draft functionality.
Enable Question-to-Case in Salesforce	Let moderators create cases from Chatter questions in your organization.
Create Auto-Response Record After Customer's First Email	Changes the order of case feed items and records, so that feed items that are automatically generated appear after the customer's first email.
Show Email Attachments in Case Attachments Related List	Displays an email icon in the case Attachments related list next to files that were attached from emails. Also displays a Source column in the case Attachments related list's list view. This feature is available in Lightning Experience only.

 **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.

Set Business Hours

Specify the hours when your support team is available to serve customers. This helps make your department's processes, such as escalations and milestones, more accurate.

Setting business hours lets you apply specific time zones and locations to:

- Milestones in entitlement processes
- Entitlement processes
- Cases
- Case escalation rules

You can also make the `Business Hours` field available on the Case Layout page so that your support agents can set the times a support team is available to work on the case. By default, business hours are set 24 hours, seven days a week in the default time zone specified in your organization's profile.

Additionally, users with the "Customize Application" permission can add business hours to escalation rules so that when the details of a case match the criteria of an escalation rule, the case is automatically updated and escalated with the times and location on the rule. For example, a case updated with Los Angeles business hours escalates only when a support team in Los Angeles is available.

To set business hours:

1. From Setup, enter `Business Hours` in the `Quick Find` box, then select **Business Hours**.

EDITIONS

Available in: Salesforce Classic

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions** with the Service Cloud

USER PERMISSIONS

To set business hours:

- Manage Business Hours Holidays

2. Click **New Business Hours**.**3.** Type a name for the business hours.

We recommend using a name that will remind users of a location or time zone when they view business hours on a case, entitlement process, or milestone. For example, if your business hours are for a support center in San Francisco, you could use the name *San Francisco Business Hours*.

4. Click **Active** to allow users to associate the business hours with cases, escalation rules, milestones, and entitlement processes.**5.** Optionally, click **Use these business hours as the default** to set the business hours as the default business hours on all new cases.

Default business hours on cases can be updated with business hours on escalation rules if the cases match escalation rule criteria and the rule is set to override business hours.

6. Choose a time zone to associate with the business hours in the **Time Zone** drop-down list.**7.** Set your business hours for each day of the week.

- If your support team is available during the entire day every day of the week, select the **24 hours** checkbox.
- Choose the start and end times for the business hours. If the time you want isn't available, click the field and type it in.
- Leave the business hours start and end times blank and the **24 hours** checkbox deselected to indicate that the support team is not available at all that day.

8. Click **Save**.

After you have set business hours, you can associate them with:

- Escalation rules, so that when the details of a case match the criteria of an escalation rule, the case is updated and escalated with the business hours on the rule.
- Holidays, so that business hours and any escalation rules associated with business hours are suspended during the dates and times specified in holidays.
- Milestones, in entitlement processes so that business hours can change with the severity of a case.
- Entitlement processes, so that you can use the same entitlement process for cases with different business hours.

 **Note:** All users, even those without the "View Setup and Configuration" user permission, can view business hours via the API.

IN THIS SECTION:[Guidelines for Setting Business Hours](#)

To make your support processes more accurate, define when your support team is available to help customers. There are a few guidelines to keep in mind as you set business hours.

SEE ALSO:[Set Up Support Holidays](#)

Guidelines for Setting Business Hours

To make your support processes more accurate, define when your support team is available to help customers. There are a few guidelines to keep in mind as you set business hours.

- After you set business hours, add the `Business Hours` lookup field to case layouts and set field-level security on the `Business Hours` field. This lets users view and update the business hours on a case.
- Business hours on a case are automatically set to your organization's default business hours, unless the case matches the criteria on an escalation rule associated with different business hours.
- Salesforce automatically calculates daylight savings times for the time zones available for business hours, so you don't have to configure rules to account for time zones.
- Business hours on a case include hours, minutes, and seconds. However, if business hours are less than 24 hours, the system ignores the seconds for the last minute before business hours end. For example, suppose it is 4:30 PM now, and business hours end at 5:00 PM. If you have a milestone with a 30-minute target, it's more common to say that the target is 5:00 PM, not 4:59 PM. To accommodate this, the system stops counting seconds after 5:00. If seconds were counted from 5:00:00-5:00:59, the 30-minute target would occur after the 5:00:00 PM target cut-off and would roll over to the next day.
- Escalation rules only run during the business hours they're associated with.
- You can update cases associated with business hours that are no longer active. without having to reactivate business hours.
- You can't include the `Business Hours` field in list views or reports.
- You can create multiple business hours for support teams that operate in the same time zone but at different hours.
- For simplicity, we recommend that you create one set of business hours per support center.
- You can't deactivate business hours that are included in escalation rules. You must first remove them from the escalation rules.
- You can associate up to 1000 holidays with each set of business hours.
- On cases that include entitlements, business hours are applied according to a hierarchy. For details, see [How Business Hours Work in Entitlement Management](#).



Note: All users, even those without the "View Setup and Configuration" user permission, can view business hours via the API.

SEE ALSO:

[Set Business Hours](#)

[Set Up Support Holidays](#)

EDITIONS

Available in: **Salesforce Classic**

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions** with the Service Cloud

Set Up Support Holidays

Holidays let you specify the dates and times your customer support team is unavailable. After you create a holiday, you can associate it with business hours to suspend business hours and escalation rules during holiday dates and times.

For example, you could create a holiday called New Year's Day that begins at 8 p.m. on December 31 and ends at 9 a.m. on January 2. Escalation rules and entitlement milestones wouldn't apply during the holiday.

1. From Setup, enter *Holidays* in the **Quick Find** box, then select **Holidays**.

2. Click **New**, or click **Clone** next to the name of an elapsed holiday.

You can only clone elapsed holidays.

3. Type a name for the holiday.

4. Type a date for the holiday.

If you want the holiday to span more than one day:

a. Select the **Recurring Holiday** checkbox.

b. Enter the first day of the holiday in the **Start Date** field.

c. Deselect the **No End Date** checkbox in the **End Date** field.

d. Enter the last day of the holiday in the **End Date** field.

5. Optionally, you can:

- Specify the exact times at which the holiday takes place by deselecting the **All Day** checkbox next to the **Time** field and entering the exact times.

- Select the **Recurring Holiday** checkbox to schedule the holiday to recur during specific dates and times:

- In the **Frequency** field, select the frequency at which the holiday recurs. When you click the **Daily**, **Weekly**, or **Monthly** fields, more options display that allow you to refine frequency criteria.

- In the **Start Date** and **End Date** fields, specify the dates during which you wish the holiday to recur.

The following error message displays if you select a start date and end date that does not correspond with the frequency you selected: **The recurring holiday has no occurrence.**

6. Click **Save**.

7. Click **Add/Remove** on the Business Hours related list.

8. Use the **Add** and **Remove** to choose the business hours you want to associate with the holiday. You can associate the holiday with multiple business hours.

 **Note:** All users, even those without the "View Setup and Configuration" user permission, can view holidays via the API.

EDITIONS

Available in: Salesforce Classic

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

Entitlements and milestones available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

USER PERMISSIONS

To set holidays:

- Manage Business Hours Holidays

IN THIS SECTION:

[Guidelines for Creating Support Holidays](#)

Holidays let you specify the dates and times your customer support team is unavailable. There are a few guidelines to keep in mind as you set up and work with holidays.

SEE ALSO:

[Set Business Hours](#)

Guidelines for Creating Support Holidays

Holidays let you specify the dates and times your customer support team is unavailable. There are a few guidelines to keep in mind as you set up and work with holidays.

- You can associate up to 1000 holidays with each set of business hours.
- Holidays automatically acquire the time zone of the business hours with which they are associated. For example if you associate a holiday to business hours that are in Pacific Standard Time, the holiday will take effect for those business hours in Pacific Standard Time
- You can only add business hours marked as `Active` to holidays.
- Holiday names don't need to be unique. For example, you could create multiple holidays named *New Year's Day*.
- Currently, report results do *not* take holidays into account.
- If you schedule a holiday to recur on a specific day of every month, the holiday will only recur on months that have that specific day. For example, if you schedule a holiday on the 31st day of every month, then the holiday will only recur on months that have 31 days. If you want a holiday to recur on the last day of every month, choose last from the `On day of every month` drop-down list.
- All users, even those without the "View Setup and Configuration" user permission, can view holidays via the API.

SEE ALSO:

[Set Up Support Holidays](#)[Set Business Hours](#)

Set Up and Manage Cases

Cases are the backbone of Service Cloud. Cases let you respond to and solve customer issues. Cases are powerful records in Salesforce that not only track customer issues, but also show a complete view of the customer. Customize cases to fit your business needs and ensure that your customers always receive the best service.

IN THIS SECTION:

[What's a Case?](#)

A case is a customer's question, feedback, or issue. 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.

[Set Up Case Teams](#)

Create case teams to help groups of people work together to solve cases. Before you create case teams, define team roles.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

[Set Up the Support Agent Experience for Cases](#)

Support agents are the front line of customer service. To ensure excellence in customer support, set up an experience for cases that makes agents successful and efficient.

[Manage and Work with Cases](#)

To keep customers happy, learn how to manage and work with cases. After a case is opened, you update the customer and case details, then you ultimately close and resolve the customer issue.

SEE ALSO:

[Set Up Queues](#)

[Set Up Assignment Rules](#)

[Set Up Auto-Response Rules](#)

[Set Up Escalation Rules](#)

What's a Case?

A case is a customer's question, feedback, or issue. 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.

Communication channels 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.

On 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: Use the Service Console and 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, you choose one of the list views to see cases that your business partners have shared with you.

SEE ALSO:

[Salesforce Console](#)

[What's Entitlement Management?](#)

[Using the Chatter Answers Q&A Tab](#)

[Case Management Implementation Guide](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Set Up Case Teams

Create case teams to help groups of people work together to solve cases. Before you create case teams, define team roles.

To let people create and work on case teams, add the Case Team related list to case page layouts.

Here's what you can do with case teams:

- Predefine case teams so that users can quickly add people with whom they work.
- Create assignment rules that add predefined teams to cases that match specific criteria, such as when cases originate from emails.
- Create email alerts that notify team members when an action happens on a case, such as when a comment is added.

After you set up case teams, users can:

- Add people to the Case Team related list on cases.
- Choose one of the predefined roles that the person plays on the case. Roles determine the level of access to a case, such as read-only or read and write access.
- Add contacts to case teams, but they can only access cases when they're enabled as customer portal users assigned to case page layouts. Customer portal users can't update case teams or view case team roles.
- Filter case lists when they're a team member, by choosing My Case Teams.
- Run a case report by choosing My team's cases from the View filter.

 **Note:** Case teams count toward your org's overall storage limit. Each team member on a case counts as 2 KB of storage space.

IN THIS SECTION:

[What's a Case Team?](#)

A case team is a group of people that work together to solve cases. For example, a case team can include support agents, support managers, and product managers.

[Create Case Team Roles](#)

Before you set up case teams or predefine case teams, create roles to determine team members level of access to cases.

[Predefine Case Teams](#)

After you define case team roles, you can predefine case teams so that support agents can quickly add people who they frequently work with to cases.

[Set Up Email Alerts for Case Teams](#)

Create email alerts for case teams so that each time a case is created or updated, team members are notified.

[Case Team Fields](#)

Case teams have the following fields, listed in alphabetical order. Availability of fields depends on how your admin set up Salesforce.

SEE ALSO:

[Set Up Queues](#)

[Set Up Assignment Rules](#)

[Create Page Layouts](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To set up and manage case teams:

- Customize Application
Manage Users
Edit on cases

What's a Case Team?

A case team is a group of people that work together to solve cases. For example, a case team can include support agents, support managers, and product managers.

If your admin has set up case teams, you can add people to the Case Team related list on cases. When adding a team member, choose one of the predefined roles that the person plays on the case. Roles determine the level of access to a case, such as read-only or read and write access.

You can add contacts to case teams, but they can only access cases when they're enabled as customer portal users assigned to case page layouts. Customer portal users can't update case teams or view case team roles. Case teams aren't available for the partner portal.



Note: Admins can predefine case teams so that you can quickly add people who you frequently work with. Admins can create assignment rules that add predefined teams to cases that match specific criteria. Admins can also create email alerts that notify team members when an action happens on a case.



Tip: To filter case lists when you're a team member, choose **My Case Teams**. To report on case teams that you belong to, run a case report, then choose **My team's cases** from the View filter.

SEE ALSO:

[Set Up Case Teams](#)

Create Case Team Roles

Before you set up case teams or predefine case teams, create roles to determine team members level of access to cases.

You can create an unlimited number of case team roles, but we recommend no more than 20 so as not to overwhelm team members.

1. From Setup, enter *Case Team Roles* in the Quick Find box, then select **Case Team Roles**.
2. Click **New**, and enter the role's name.
3. From Case Access, choose the role's level of access to cases.

Read and Write

Members can view and edit cases and add related records, notes, and attachments to them.

Read Only

Members can view cases and add related records to them.

Private

Members can't access cases.

4. If you want members in the role visible to customer portal users viewing cases, choose **Visible in Customer Portal**. Even if Visible in Customer Portal isn't chosen, customer portal users added to case teams can view themselves on Case Team related lists.
5. Click **Save**.



Note: You can't delete roles, but you can click **Replace** next to a role you want to replace across all cases. If your org has one role, you can't replace it.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To set up and manage case teams:

- Customize Application
- Manage Users
- Edit on cases

 **Tip:** Roles don't change a case owner's access to cases, which is Read and Write by default.

SEE ALSO:

[Set Up Case Teams](#)

Predefine Case Teams

After you define case team roles, you can predefine case teams so that support agents can quickly add people who they frequently work with to cases.

1. From Setup, enter *Predefined Case Teams* in the **Quick Find** box, then select **Predefined Case Teams**.
2. Click **New**, and enter the team's name.
3. Add team members.
 - a. Choose a team member type: User, Contact, or Customer Portal User. Contacts can access cases only when they're enabled as customer portal users and assigned to case page layouts.
 - b. Click **Lookup**  and select a member.
 - c. Choose a role for the member.
4. Click **Save**.

 **Note:** To delete a predefined case team, remove it from assignment rules first. If you delete a predefined case team, it's removed from all cases it's on, and you can't retrieve it from the Recycle Bin. When you remove members from a predefined case team, they're removed from all cases in which they were members of the team.

SEE ALSO:

[Set Up Case Teams](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To set up and manage case teams:

- Customize Application
Manage Users
Edit on cases

Set Up Email Alerts for Case Teams

Create email alerts for case teams so that each time a case is created or updated, team members are notified.

1. Create email templates for notifications.
2. Set up workflow rules that specify which actions on a case send email alerts to team members.
 - a. From Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules**.
 - b. Click **New Rule**.
 - c. From **Select object**, choose **Case** and click **Next**.
 - d. Enter a rule name.
 - e. Choose the evaluation criteria. To ensure that every case is evaluated for an email alert, we recommend that you set the evaluation criteria to **Evaluate the rule when a record is: created, and every time it's edited**.
 - f. Enter your rule criteria. We recommend that you choose **criteria are met** and select the criteria that a case must match to send email alerts. For example, if you want team members to receive an email alert each time a case's status is set to New, set the criteria to *Case : Status equals New*.
 - g. Click **Save & Next**.
3. Add email alerts to your workflow rule's criteria.
 - a. Click **Add Workflow Action** and choose **New Email Alert**.
 - b. Enter a description and unique name for the email alert. Because you chose Case as the object for the workflow rule, object appears as read only.
 - c. Choose an email template.
 - d. Select who receives email alerts from the workflow rule. To select all members of a case team, choose **Case Team** from Recipient Type, and add the team as selected recipients. You can enter up to five more email addresses.
 - e. Click **Save**.
4. Activate the workflow rule and its email alert.
 - a. From Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules**
 - b. Click **Activate** next to the name of the rule.

 **Note:** To prevent the rule from sending email alerts, click **Deactivate** at any time. If you deactivate a rule with pending actions, the actions finish as long as the case that triggered the rule isn't updated.

SEE ALSO:

[Set Up Case Teams](#)

[Email Templates in Salesforce Classic](#)

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

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

USER PERMISSIONS

To set up case teams:

- Customize Application
- AND
- Manage Users

To create or change workflow rules:

- Customize Application

To create or change email alerts:

- Customize Application

Case Team Fields

Case teams have the following fields, listed in alphabetical order. Availability of fields depends on how your admin set up Salesforce.

Field	Description
Case Access	The level of access a team member has to a case, such as Read, Write, Read Only, or Private. Case access can't be less than your org's default case sharing access.
Member Name	The name of a user on a case team.
Member Role	The team member's role on the case, such as support agent or case manager.
Visible in Customer Portal	Indicates whether the case team member appears in the customer portal.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

SEE ALSO:

[What's a Case Team?](#)

Set Up the Support Agent Experience for Cases

Support agents are the front line of customer service. To ensure excellence in customer support, set up an experience for cases that makes agents successful and efficient.

IN THIS SECTION:

[Set Up Cases for Salesforce Classic](#)

Follow these high-level steps to set up Case Feed in Salesforce Classic.

[Set Up Cases for Lightning Experience](#)

Before your agents can use the case feed and its publisher in Lightning Experience, you must recreate some quick actions. You can also customize the agent experience for case hovers.

Set Up Cases for Salesforce Classic

Follow these high-level steps to set up Case Feed in Salesforce Classic.

Prerequisites and Basic Setup

Before you enable and customize Case Feed:

- Decide which actions and tools you need:
 - To use the Email action, [set up Email-to-Case](#).
 - To use the articles tool, [set up Salesforce Knowledge](#).
- [Review how cases are upgraded and know what to expect](#) when you enable Case Feed actions and feed items.

When you're ready, [enable Case Feed actions and feed items](#).

 **Note:** In organizations created before Winter '14, you also need to:

- Enable Chatter and actions in the publisher.
- Enable feed tracking on cases. On the feed tracking page, turn off tracking for the Status field. Turning off tracking for the Status field prevents duplicate feed items when agents update a case's status using the Change Status action.

Customizing Page Layouts

Choose what you want to appear on Case Feed page layouts based on your company's needs and how your support agents work.

- [Create layouts for case detail and close case pages](#) and [highlights panels](#).
- [Create layouts for feed view pages](#) to specify which actions, fields, and tools agents see when they're working with cases.

Giving Users Access

The easiest way to give users access to Case Feed is to assign them to profiles that use the feed-based case page layouts you create.

In organizations created before Spring '14, you may also be able to give users access in two other ways:

- [By creating permission sets](#) and [assigning them to users](#)
- [Through custom profiles](#)

Setting Up Case Feed: Adding More Functionality

Follow these optional steps to add more functionality to Case Feed.

- To let agents include short, pre-written messages in their emails, [set up quick text](#) and [create quick text messages](#).
- To give agents the option of emailing customers to let them know when questions they've posted to a portal have been answered, [enable portal email notifications](#).
- To allow agents to save email messages as drafts before sending them, and to make it possible to create approval actions for email, [enable email drafts](#).
- To help agents save time and increase consistency when sending emails to customers, create text, HTML, or Visualforce [email templates](#).
- To let agents automate repetitive tasks, [add the macros browser](#) on page 265 to the console and give agents permission to use macros.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To set up and customize Case Feed:

- Manage Cases
- AND
- Customize Application

- To give agents access to more functionality, [create and add custom actions](#).

SEE ALSO:

[Chatter Settings](#)

[Enable Actions in the Chatter Publisher](#)

[Assign Page Layouts from a Customize Page Layout or Record Type Page](#)

Enable Case Feed Actions and Feed Items

Enabling Case Feed actions and feed items gives your users access to some standard actions they'll need when working with cases, such as Email and Change Status, and to feed items related to those actions.

 **Note:** In Salesforce orgs created before the Winter '14 release, you must enable feed tracking on Cases before you can enable the Case Feed actions and feed items. If feed tracking isn't enabled, then the `Enable Case Feed Actions and Feed Items` isn't visible.

In Salesforce organizations created after the Winter '14 release, feed tracking on cases and Case Feed actions and feed items are automatically enabled.

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Case Feed Actions and Feed Items`.
4. Click **Save**.

Once you enable Case Feed actions and feed items, your cases are upgraded to the new user interface automatically. We recommend that you wait until this upgrade process is finished before giving users access to Case Feed.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Case Feed Upgrade Results](#)

[Assign Case Feed to Users](#)

[Enable Feed Updates for Related Records](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To change support settings:

- `Manage Cases`

AND

`Customize Application`

Create Permission Sets for Case Feed

After you enable Case Feed for your organization, create a permission set to give users access to it.

 **Note:** The Use Case Feed permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a permission set for Case Feed.
2. On the Permission Set page, click **App Permissions**.
3. Select `Use Case Feed`. Optionally, select any other permissions you want to include in the set.
4. Click **Save**.

 **Tip:** If you have an existing permission set, you can edit it to include the `Use Case Feed` permission.

SEE ALSO:

- [Set Up Cases for Salesforce Classic](#)
- [Assign Case Feed to Users](#)

Assign Case Feed to Users

After you've enabled Case Feed in your organization and created a permission set that includes it, assign that permission set to users.

1. From Setup, enter `users` in the `Quick Find` box, then select **Users**.
2. Select a user's name.
3. In the Permission Set Assignments list, click **Edit Assignments**.
4. Select the permission set you want in the `Available Permission Sets` list, and then click **Add**.
5. Click **Save**.

SEE ALSO:

- [Set Up Cases for Salesforce Classic](#)
- [Create Permission Sets for Case Feed](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create permission sets:

- [Manage Profiles and Permission Sets](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To change support settings:

- [Manage Cases](#)
- AND
- [Customize Application](#)

Give Users Access to Case Feed Through Custom Profiles

Instead of giving users access to Case Feed through permission sets, you can create a custom profile that includes the `Use Case Feed` user permission.

 **Note:** The Use Case Feed permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a profile.
2. On the Profile page, click **Edit**.
3. In General User Permissions, select `Use Case Feed`.
4. Click **Save**.
5. Assign users to the profile.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Case Feed Upgrade Results

When you enable Case Feed for your organization, an upgrade process converts active cases to the new interface and creates feed items for activity on those cases.

During the upgrade process, users won't notice anything different. After the process is complete, users for whom you've enabled Case Feed see existing and new cases in the new interface, while users without Case Feed continue to see traditional cases.

Here's what happens when cases are upgraded to the new interface:

- The 5000 most recent, active cases in your organization are converted to the Case Feed interface. How long this takes varies depending on the number of cases being converted and the complexity of the data they contain. For example, cases with multiple email messages or other attachments may take longer to convert than other cases.
- Older cases are also upgraded if they have comments, emails, or logged calls that were added to the case within the date range that applies to the original 5000 converted cases. You can have up to 500 cases with current comments, up to 500 with current emails, and up to 500 with current logged calls for a total of 1500 additional converted cases.
- The following items are added to the feed for each case:
 - Up to 60 email messages.
 - Up to 60 private and public comments. These are converted from comments to Chatter posts during the upgrade.
 - Up to 60 logged calls. Some logged calls that were created before you upgraded to Case Feed may appear in the feed as tasks.
- The Case Feed interface is enabled for all new cases, giving users access to the publisher and feed.
- The Case Detail view becomes available, and contains additional information about the case, including items that remain in their current related lists.

You'll receive an email message once the upgrade process has finished.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create and edit profiles:

- [Manage Profiles and Permission Sets](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Best Practices

- For the smoothest upgrade experience, we recommend enabling Case Feed in a full-copy sandbox organization before you enable it in your production organization. This helps you determine how long the case conversion process takes and lets you review some sample cases in the new user interface.
- After you enable Case Feed in your production organization, wait until the upgrade process has finished to give users access. We recommend first assigning Case Feed to a single user, who can review some of the converted cases to be sure the upgrade process was successful, and then making it available to other users.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Enable Case Feed Actions and Feed Items](#)

Enable Portal Reply Email Notifications in Case Feed

If your organization uses a portal or community, support agents can use the Community action in Case Feed to respond to customers. Enabling portal reply email notifications gives agents access to the `Send Email` option in the Community action.

1. From Setup, enter `Support Settings` in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Case Comment Notification to Contacts`.
4. Select a template for email notifications.
5. Click **Save**.

Emails sent to external users include a link to the community. If the user receiving the email is a member of multiple active communities, the link goes to the oldest active community. If the user is already logged in to a community and clicks the link in the email, the link goes to that community. If the user is not a member of any community, the link goes to the internal organization. If the user is a member of a portal and a community, the link goes to the community.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To change support settings:

- `Manage Cases`
- AND
- `Customize Application`

Highlight Externally Visible Feed Items in Case Feed

You can mark feed items in the case feed that are visible to external users. That way support agents can easily distinguish between feed items that are visible to your customers and ones that are visible only to internal users, like support agents.

By default, the case feed doesn't distinguish feed items according to who can see them.

To mark this distinction, enable both the `Highlight Externally Visible Feed Items` and `Enable Community Case Feed` settings. After the settings are enabled, the following types of posts are marked as publicly visible in the case feed:

- Public emails sent to or received from the email address for a case contact
- Public case comments
- All social posts, such as Facebook posts
- Questions escalated from Communities
- Tasks that have the All with Access or Public settings
- Events that have the All with Access or Public settings
- Chatter posts that have the All with Access or Public settings
- Logged Calls

If you enable only `Highlight Externally Visible Feed Items`, then only incoming and outgoing email feed items that are sent to, or received from, the email address for a case contact are marked.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To change support settings:

- **Manage Cases**
- AND
- **Customize Application**

The screenshot shows the Salesforce interface for a case. At the top, there's a search bar and navigation tabs for 'Cases', 'Global Media', and '00001003'. The case details for 'Jon Amos' (Acme) are shown, with the subject 'Continuous Error State'. Below this is a toolbar with actions like 'Post', 'Log a Call', 'Community', 'Change Status', 'File', and 'Link'. A filter bar shows 'All Updates' selected. The feed contains three items from 'Randy Bobandy':

- Item 1: 'replied to the customer...' with a circled 'P' icon.
- Item 2: 'to signup.org.test.1531082752007 Only' with a circled 'P' icon.
- Item 3: 'created this case...' with a circled 'P' icon.

To mark your case feed items, complete the following steps.

1. Enable the `Highlight Externally Visible Feed Items` setting.
 - a. From your object management settings for cases, go to Page Layouts.
 - b. Select the feed-based page layout that you want to edit, and click **Edit**.
 - c. Scroll to the Feed View settings and select `Highlight Externally Visible Feed Items`.
2. Enable the `Enable Community Case Feed` setting.
 - a. From Setup, enter `Support Settings` in the Quick Find box and click **Service > Support Settings**.
 - b. Select `Enable Community Case Feed`.

Enable Email Drafts for Cases

Draft emails let support agents who use the case feed write and save messages without having to send them immediately. In Salesforce Classic, this option makes it possible to implement approval processes so messages can be reviewed by supervisors or senior agents before they're sent to customers.

Before enabling email drafts, [set up Email-to-Case](#). In Salesforce Classic, you must also enable [Case Feed](#).

1. From Setup, enter `Support Settings` in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Email Drafts`.
4. Click **Save**.



Note:

Salesforce Classic

Changes to fields other than `To`, `From`, `CC`, `BCC`, and `Subject` in the Email action aren't saved when a message is saved as a draft. We recommend removing any additional fields from the Email action if you plan to use draft emails.

Lightning Experience

We recommend removing any additional fields from the Email action if you plan to use private email drafts. Changes to custom email message fields may not be saved immediately. However, when a standard field is modified, the previous custom field changes are also saved.

SEE ALSO:

- [Set Up Cases for Salesforce Classic](#)
- [Create Approval Processes for Email Drafts](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To change support settings:

- [Manage Cases](#)
- AND
- [Customize Application](#)

Add Custom Components to Case Feed

Use Visualforce pages as custom components in Case Feed to give support agents easy access to special tools or functionality while they're working with cases.

For example, you might create a map component that lets agents see where a customer is located, or a tool agents can use to look up the products related to cases they're working on. You can use any Visualforce page that includes the standard case controller as a custom component.

Once you've created a Visualforce page to use as a custom component, add it to the Case Feed layout.

- How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
- In the Other Tools and Components section, click **+ Add a Visualforce page** and choose the page you want.

The width of the component is determined by the width of the column it's in. To make the component look best, we recommend setting the width of the Visualforce page to 100%.
- Set the height of the component.
- Choose where you want the component to appear on the page.

 **Tip:** Components in the right column are hidden when agents view the Case Detail page, so use the left column for any components you want to be accessible all the time.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

Add Custom Actions in Case Feed

Include custom actions in the Case Feed publisher to give support agents easy access to the additional tools and functionality they need when working with cases.

Actions in Case Feed let support agents perform tasks like emailing customers, writing case notes, and changing the status of a case. Using Visualforce pages, you can create custom actions that offer agents more functionality. For example, you might create a Map and Local Search action that lets agents look up the customer's location and find nearby service centers.

You can use any Visualforce page that uses the standard case controller as a custom action.

 **Note:** If you've opted to use the advanced page layout editor to configure the publisher for a Case Feed layout, see [Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#) for instructions on adding actions.

- From the object management settings for cases, go to Page Layouts.
- How you access the Case Feed Settings page depends on what kind of page layout you're working with.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To change Case Feed settings:

- Manage Cases
- AND
- Customize Application

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To add custom actions to Case Feed:

- Customize Application

- For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
- For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

3. Click **+ Add a Visualforce Page** in the list of custom actions.
4. Select the page you want to add as an action.
5. Specify the height of the action in pixels.
6. Click **Save**.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Developer's Guide: Customizing Case Feed with Visualforce](#)

[Find Object Management Settings](#)

Create Custom Feed Filters for Case Feed

Custom feed filters help support agents focus on the items that are most relevant for them.

1. From Setup, enter `Cases` in the `Quick Find` box, then select **Feed Filters**.
2. Click **New**.
3. In the Feed Filter Information section, enter the filter label, name, and description.
4. In the Feed Filter Criteria section, define how to populate this filter. You can create more refined filters using the OR function.

Field	Description
Feed Item Type	Specifies the feed type to include in the filter. For example, the Created Record feed item type shows feed items about new records.
Related Object	Specifies the object associated with the selected feed item. The list includes all objects related to the Case object. The objects in the list vary depending on how your organization is set up. For example, if you selected Created Record as the feed item type, you might select Case as the related object. This filter then shows new Cases.
Visibility	Specifies whether to include a feed item in the filter based on the feed item's visibility. The visibility depends on the security and sharing settings for the related object. Visibility can include either All Users or Internal Users. For example, suppose that you selected Case Comment Feed as the feed item type and Internal Users as the visibility. This feed filter then shows case comments made by internal users.

5. Click **Save**.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, Developer** with a Service Cloud license

USER PERMISSIONS

To create and edit page layouts:

- Customize Application

To assign page layouts:

- Manage Users

- After you define your custom feed filters, add the filters to the list of selected filters in the Feed Filter Options section of the page layout's Feed View settings.



Example: To create a filter that shows interactions with a customer, you could define a filter named Customer Interaction that uses the following criteria.

- Criterion 1: Case Comment feed item type with visibility set to All Users
- Criterion 2: Email Message feed item type with visibility set to All Users
- Criterion 3: Chatter post feed item type with visibility set to All Users

When an agent applies this filter, the case feed shows only Case Comment, Email Message, and Chatter feed items that are visible to both external and internal users. Everything else is filtered out.

SEE ALSO:

[Create and Edit Feed Layouts in Case Feed](#)
[Settings for Feed Views in Case Feed](#)

Case Feed Page Layouts Overview

When support agents work with cases in Case Feed, they use the case page layout. To specify the fields, tools, and functionality that support agents see when working with open cases, customize the feed view, detail view, highlights panel in the case page. When agents close a case, they see the close case page layout, where agents can enter information about the case resolution. You also can customize the close case page layout.

You can customize different parts of the case page layout in Case Feed:

- Highlights panels, which appear at the top of both feeds and case detail pages. The highlights panel shows key information about a case so that the most important information is immediately visible to agents.
- Feed views, which agents see when managing and interacting with cases. The feed view shows the case history using a Chatter-like feed, so that agents can see what's happened in a case in context.
- Detail views, which agents see when they click **View Case Details**. The detail view shows useful information about the case, such as a description of the contact's company, the account's address, and related lists.

You also can customize the close case page layout in Case Feed:

- Close case pages, which appear when agents close cases. The close case page lets agents enter information about the case resolution.

From the object management settings for cases, you can create, edit, and assign all four types of layouts by going to Page Layouts.

SEE ALSO:

[Create and Edit Feed Layouts in Case Feed](#)
[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)
[Customize the Highlights Panel in Case Feed](#)
[Find Object Management Settings](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Customize the Highlights Panel in Case Feed

The highlights panel appears at the top of the feed detail views and shows the most important information about a case. Edit the highlights panel to include the fields that are most important for your support agents.

1. From the object management settings for cases, go to Page Layouts.
2. In Page Layouts for Case Feed users, click  next to a layout and choose **Edit detail view**.
3. Hover your mouse pointer over the Highlights Panel until the  icon appears, then click it.
4. On the Highlights Panel Properties page, click a box to edit the fields in it.
5. Use the drop-down list to choose the type of information to include in each field. To leave a field blank, choose `None`. You can't move or delete `Case Number` or `Created Date`.
6. Click **OK**.

SEE ALSO:

[Set Up Cases for Salesforce Classic](#)

[Find Object Management Settings](#)

Create and Edit Feed Layouts in Case Feed

Feed view page layouts determine which actions, fields, and tools users see when they're working with cases in Case Feed. You can create different layouts and assign them to different user profiles. For example, you might have one layout for agents and another for supervisors.

 **Note:** Before creating a new feed view page layout, you need to create a new case detail page layout.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose `Edit detail view` to add, change, or remove actions.
3. [Choose the tools, components, and options for your feed view page.](#)
4. Click **Save**.

Once you've created or edited feed view page layouts, assign them to profiles.

SEE ALSO:

[Case Feed Page Layouts Overview](#)

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

[Find Object Management Settings](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create and edit page layouts:

- [Customize Application](#)

To assign page layouts:

- [Manage Users](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create and edit page layouts:

- [Customize Application](#)

To assign page layouts:

- [Manage Users](#)

Settings for Feed Views in Case Feed

Use Case Feed settings to customize the feature according to your support department's processes and business needs.

Apply these settings when you [create or update feed views for Case Feed](#).

Feed View Options

Option	Use It to...	Notes
Enable Full-Width Feed View in the Console	Expand the width of the feed to take up all available space when agents view cases in Salesforce console tabs or subtabs.	<p>The portion of the page the feed takes up with this setting enabled depends on whether you have tools or components in the right column of the Case Feed layout, and whether you have console sidebar components.</p> <p>This setting is automatically enabled in organizations created after Summer '14.</p>
Enable Compact Feed View in the Console	Update the overall look and feel of the feed view and compress feed items when agents view cases in Salesforce console tabs or subtabs.	<p>Compact feed lets agents see more information about a case with much less scrolling than they need to do when working with cases in the standard feed view.</p> <p>This option is only available if you have Actions in the Publisher and Use Page Layout Editor to Configure Actions enabled.</p>
Highlight Externally Visible Feed Items	Indicate which feed items are visible to external users by changing the background color of the feed item to orange.	<p>This option is only available for compact feed.</p> <p>When this setting and the Enable Community Case Feed setting are both enabled, the following feed items are highlighted in the case feed:</p> <ul style="list-style-type: none"> • Public emails sent to or received from the email address for contact person on a case • Public case comments • All social posts • Questions escalated from Communities • Tasks that have the All with Access/Public setting • Events that have the All with Access/Public setting • Chatter posts that have the All with Access/Public setting <p>See also Set Up the Community Case Feed.</p>

Publisher Options

Option	Use It to...	Notes
Use Page Layout Editor to Configure Actions	Make the advanced page layout editor the default for choosing the actions that appear in the Case Feed publisher.	This setting appears only if your organization has <code>Actions in the Publisher</code> enabled.
Automatically Collapse Publisher	Automatically reduce the height of the publisher when it's not in use, showing more of the feed below. The publisher expands to its normal height as soon as an agent clicks inside it.	This setting is automatically enabled in organizations created after Summer '14 and is only available if you have <code>Actions in the Publisher</code> and <code>Use Page Layout Editor to Configure Actions</code> enabled.

Choosing and Configuring Actions

Option	Use It to...	Notes
Menu Placement	Choose whether you want the publisher menu to appear in the center column or the left column.	This setting appears only if you <i>haven't</i> selected <code>Use Page Layout Editor to Configure Actions</code> .
Custom Actions	Select up to 10 custom Visualforce pages to add to the publisher as actions. Pages must use the standard case controller.	This setting appears only if you <i>haven't</i> selected <code>Use Page Layout Editor to Configure Actions</code> .
Select Action	Select actions to include in the Case Feed publisher, and choose the order in which the actions appear.	This setting appears only if you <i>haven't</i> selected <code>Use Page Layout Editor to Configure Actions</code> .

Log a Call Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Log a Call action.	Log a Call automatically includes the <code>Customer Name</code> field. You can't include rich text area fields in Case Feed actions.

Change Status Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Change Status action.	The Change Status action automatically includes the <code>Current Status</code> and <code>Change to</code> fields. If you add the <code>Status</code> field to the action, it will automatically replace these two fields.

Option	Use It to...	Notes
		You can't include rich text area fields in Case Feed actions.

Email Action

Option	Use It to...	Notes
Select Action Fields	Select fields to include in the Email action.	Any fields you add appear below the email body field in the action. You can't include rich text area fields in Case Feed actions.
Select Header Fields	Select fields to include in the header of the Email action.	The Email header automatically includes the From, To, Bcc, and Subject fields.
Select Email Tools	Choose the tools to make available to agents when they use the Email action.	The Templates, File Attachments, and Address Lookup Buttons tools are included automatically.
Enable Rich Text Editor	Make the rich text editor available to agents so they can include formatting, such as bolded or underlined text, bulleted or numbered lists, links, and inline images in their email messages.	Agents can click  in the editor's menu bar to switch to plain text mode.
Require Use of Rich Text Editor	Prevent agents from switching to plain text mode when they write email.	This setting helps ensure that agents write and send only formatted emails, not plain text messages.
Specify From Address(es)	Automatically include specific email addresses in the From field.	To use multiple addresses, separate them with commas. They'll appear as a picklist in the Email action header. You can use only Salesforce-validated email addresses as From addresses.
Allow Collapsible Body Field	Automatically collapse the email body field until an agent clicks inside it. Having the body collapsed by default makes it easier for agents to see more of what's below the email action on the page.	Once an agent expands the email body, it will stay expanded until the page is reloaded, even if the agent clicks on other actions or elsewhere on the page.
Allow Collapsible Email Header	Automatically collapse the email header until an agent clicks  to expand it.	With this setting enabled, agents can expand and collapse the header as needed while they work.
Exclude Email Thread from Drafts	Exclude the previous emails in the thread when composing emails in the feed.	This prevents the previous emails in the thread from being incorporated in the outbound email message.

Option	Use It to...	Notes
Replace Send Email Button with	Choose a button to replace the standard Send Email button. This can be useful if you want to label the button something else, change how it looks, or include custom functionality, such as triggering a workflow when an agent sends a message.	You can use any custom button you've created for cases, except those that have s-controls as content sources.

Case Feed Tools

Option	Use It to...	Notes
Select Case Feed Tools	Choose which tools to make available to agents when they use Case Feed.	The Articles tool is included by default, but it won't appear on the Case Feed page unless your organization uses Salesforce Knowledge.

Articles Tool

Option	Use It to...	Notes
Enable Email PDF Attachments	Give agents the ability to attach Knowledge articles to email messages as PDFs.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and <i>don't</i> enable this setting, agents will be able to attach articles only to cases, not to email messages.
Use Case Feed Articles Tool in the Console	Replace the Knowledge sidebar in the Salesforce console with the Case Feed articles tool.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and <i>don't</i> enable this setting, we recommend hiding either the Case Feed articles tool or the Knowledge sidebar in the Salesforce console so agents see only one of those tools when they're working with cases in the console.

Other Tools and Components

Option	Use It to...	Notes
Custom Components	Select up to 10 custom Visualforce pages to add as components. You can use as a custom component any Visualforce page that uses the standard case controller.	Once you add a Visualforce page, you can specify its height and choose where on the page you want it to appear.
Choose Placement	Specify where on the page you want tools and components like custom buttons, custom links,	Custom links and buttons are only available as right sidebar components on the feed view page layout if you've added them to the related case detail page layout.

Option	Use It to...	Notes
	and the followers list to appear. You can also choose to hide anything your agents don't need access to.	The Milestone Tracker is available only if you've enabled entitlement management in your organization. The Topics list is available only if you've enabled topics on cases .

Filter Options

Option	Use It to...	Notes
Filters Appear	Specify where and how feed filters appears: <ul style="list-style-type: none"> As a fixed list in the left column As a floating list in the left column As a drop-down list in the center column 	Choose "As a floating list in the left column" if you want the feed filters list to remain visible as users scroll down the page. This can be useful with long feeds, as it lets agents quickly filter case activities from anywhere on the page, without having to scroll to the top.
Select Filters	Choose the filters to include in the feed filters list, and specify the order of the list.	We recommend putting the filters agents are likely to use most often at the top of the list.

SEE ALSO:

[Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)

Add the Attachment Component to Case Feed

Add the attachment component to the Case Feed page so your support agents can quickly view and manage all of the files associated with a case.

Access to all of the files associated with a case is critical to support agents when they're helping your customers. The attachment component lets agents view and manage all of the Chatter files, attachments from emails, and case attachment related list files for a case, all on the Case Feed page. Using the attachment component, agents can quickly attach a file to an email and download a file.

Agents can toggle between a view of the most recent attachments for a case across all sources and a view of all of the files associated with a case sorted by their creation date.

- From the object management settings for cases, go to Page Layouts.
- How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose **Edit feed view**. (This section appears only for organizations created before Spring '14.)
- In the Other Tools and Components section, select **Files**, and specify where on the page you want it to appear.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit page layouts:

- Customize Application

To assign page layouts:

- Manage Users

4. Click **Save**.

Add the attachment component to your custom pages by including the `<support:caseUnifiedFiles>` component in a Visualforce page, or [add it as a Salesforce console component](#) to make it available to agents without having to take up space on a Case Feed page.

SEE ALSO:

[Find Object Management Settings](#)

Add the Case Experts Component (Pilot) to Case Feed

Easily identify the experts on case topics so agents can collaborate to solve customer issues quickly.

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

Using the power of topics on cases, support agents can be endorsed as experts on specific topics. Agents endorsed as experts can help other agents who might be less knowledgeable on the topic. To establish case experts in your organization, you must have Chatter and topics for cases enabled.

To enable Case Experts, display the Experts component on Case Feed.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)
3. In the Other Tools and Components section, select **Case Experts**, and specify where on the page you want it to appear.

4. Click **Save**.

Add the experts component to your custom pages by including the `<apex:support:caseExperts>` component in a Visualforce page.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit page layouts:

- Customize Application

To assign page layouts:

- Manage Users

Configure the Case Feed Publisher with the Enhanced Page Layout Editor

If your organization uses the actions in the publisher feature, you can use the enhanced page layout editor to choose the actions that appear in the Case Feed publisher.

 **Note:** This option is selected by default for new Salesforce organizations that use Case Feed, and for organizations that enable Case Feed after the Summer '13 release.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)
3. Select `Use Page Layout Editor to Configure Actions`.
4. Click **Save**.
5. To access the page layout editor:
 - For a layout in the Case Page Layouts section, click **Edit**.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit detail view`. (This section appears only for organizations created before Spring '14.)
6. In the page layout editor, click  in the Quick Actions in the Salesforce Classic Publisher section.
7. In the palette, click **Quick Actions**.
8. Drag the actions you want to the Quick Actions in the Salesforce Classic Publisher section. You can also drag actions to change the order in which they appear and drag off actions you don't want. On the Case Feed page, up to approximately five or six actions are displayed in the publisher; the rest are included in the More drop-down list.

9. Click **Save**.

If you've previously used the Case Feed Settings page to configure the publisher, you see these differences when you switch to the enhanced page layout editor:

- The actions list appears at the top of the publisher. You can no longer position the actions list to the left of the publisher.
- The Answer Customer action has been divided into its two component actions: Email and Portal.
- The actions list looks more like the Chatter publisher on other pages.
- The standard Chatter actions—Post, File, Link, Poll, Question, and Thanks—automatically appear in the publisher layout, and they replace the Write Case Note action. You can change the sequence of these actions and remove any you don't need.
- The Feed View/Details drop-down list replaces the View Case Detail action.
- Custom actions you previously added to the Case Feed publisher aren't available. Create new custom actions and add them to the publisher. These new actions must use `publisher.js` rather than `interaction.js`.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To configure the Case Feed publisher:

- [Customize Application](#)

- The Case Detail page expands to full width, making it easier to see all of your related lists and other information.

SEE ALSO:

- [Case Feed Page Layouts Overview](#)
- [Create and Edit Feed Layouts in Case Feed](#)
- [Find Object Management Settings](#)

Convert Page Layouts for Case Feed Users to Case Page Layouts

As of Spring '14, we've made creating and customizing case layouts easier by replacing page layouts for Case Feed users with feed-based layouts for case pages. By converting your older page layouts, you can use the advanced page layout editor to manage them and can assign Case Feed to users more easily.

-  **Note:** Page layouts for Case Feed users are available only in organizations created prior to Spring '14.

Feed-based case layouts include the same features as page layouts for Case Feed users: a feed, which includes a publisher with actions, feed filters, tools such as an articles tool, and sidebar components such as custom buttons and links; a highlights panel; and a detail page, with related lists and other in-depth information about the case. You can use the standard page layout assignment tool to assign feed-based case page layouts to users, which means you no longer have to use permission sets or custom profiles to give users access to Case Feed.

To convert page layouts for Case Feed users to feed-based case layouts:

1. From the object management settings for cases, go to Page Layouts.
2. Click  next to a layout in the Page Layouts for Case Feed Users list and choose **Convert to case page layout**.

We recommend using this option so you can review the converted layout before you delete the original, but to save time, you can choose **Convert to page layout and delete**.

3. The converted layout appears in the Case Page Layouts list with the prefix **Converted:**. Click **Edit** next to it.
4. In the page layout editor, confirm that the layout includes the elements you want. To see and edit what's included in the feed view, including feed filters and sidebar components, click **Feed View**.
5. Once you're happy with the case page layout, click **Page Layout Assignment** in the Case Page Layouts list to assign it to the appropriate user profiles.

-  **Note:** For custom profiles with the **Use Case Feed** permission, or profiles with permission sets that include **Use Case Feed**, these page assignments won't take effect until you remove the permission or permission set. If your organization was created between Winter '14 and Spring '14, you can't remove **Use Case Feed** from standard profiles, so these assignments won't take effect until you delete all of your page layouts for Case Feed users.

6. Click  next to the older version of the layout in the Page Layouts for Case Feed Users list and choose **Delete**. In the confirmation that appears, click **OK**.
7. If there are users assigned to the layout you delete, you're prompted to choose another layout as a replacement. This is only a formality: Once you assign users to a case page layout, that's what they'll see.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To create and edit page layouts:

- **Customize Application**

To assign page layouts:

- **Manage Users**

If you have multiple layouts for Case Feed users, we recommend converting and deleting them all at the same time. Once you delete the last of your older layouts, the Page Layouts for Case Feed Users list will disappear.

SEE ALSO:

- [Create and Edit Feed Layouts in Case Feed](#)
- [Configure the Case Feed Publisher with the Enhanced Page Layout Editor](#)
- [Assign Page Layouts from a Customize Page Layout or Record Type Page](#)
- [Find Object Management Settings](#)

Add Global Actions and Custom Quick Actions as Components to the Console Sidebar

You can add global actions and custom quick actions as components to the Service Console sidebar, so agents can create records, update case info, search for related info, and link to parent records—all without ever leaving the current tab. You can use quick actions to replace the Case Detail Page, so agents can see case-related information, such as contacts and assets, in their main workflow.

1. Create the global action (for the Create action) and the custom quick action (for the Update action).

Create actions must be global quick actions. Update actions must be object-specific quick actions that are based on the lookup field object type. For example, to update a contact lookup field, you must have a contact-specific update action.

2. Add the actions as components to the case page layouts so that the quick actions are available for your agents to use.

- a. From Setup, enter “Case” in the Quick Find box, then select **Page Layouts**.
- b. Select the page to which you want to add the quick actions and click **Edit**.
- c. In the Case Layout page, select **Custom Console Components**.
- d. Go to the Sidebar section where you want to add the component (for example, go to the Left Sidebar section).
- e. For **Type**, select **Lookup**.
- f. For **Field**, select the related field that the quick action acts on.
- g. Select **Enable Linking** to allow support agents search for a record and link it to a related record. For example, a support agent can link a contact name to a case.
- h. For **Create Action**, select the global action that creates a record. For example, a global action can create a contact.
- i. For **Update Action**, select the quick action the updates a record. For example, a quick action can update a field on the contact.
- j. Click **Save**.

SEE ALSO:

- [Create Object-Specific Quick Actions](#)
- [Create Global Quick Actions](#)
- [Create Global Quick Actions](#)
- [Add Console Components to Page Layouts in Salesforce Classic](#)

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** with a Service Cloud license

USER PERMISSIONS

To create actions:

- Customize Application

To add custom console components:

- Customize Application

Enable Default Email Templates in Case Feed

Use default email templates in Case Feed to give support agents easy access to the templates they need based on the types of cases they're working on.

Before you can enable default email templates, you need to create text, HTML, or Visualforce templates, and create an Apex class that contains template selection logic.

Default email templates make it easy for support agents to respond to customers more quickly, more accurately, and with greater consistency. The email templates are preloaded, so agents don't need to browse for the templates they need before writing email. You can create as many templates as needed and assign them based on your company's needs. For example, if your support center handles issues related to multiple products, you can create a specific template for each product and preload the appropriate template based on a case's origin, subject, or other criteria.

To enable default email templates:

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable default email templates`.
4. Choose the Apex class that contains your template selection logic.
5. Click **Save**.

SEE ALSO:

[Create Send Actions for Email Approval Processes](#)

[Create Approval Processes for Email Drafts](#)

[Review and Approve Email Drafts in the Salesforce Classic Case Feed](#)

Create Send Actions for Email Approval Processes

Use send actions to save your support agents time by ensuring that email messages are sent automatically at the end of an approval process.

 **Note:** Send actions are available only in organizations that have email drafts enabled.

1. From Setup, enter *Send Actions* in the Quick Find box, then select **Send Actions**.
2. Click **New Send Action**.
3. Select Email Message from the object dropdown list.
4. Enter a unique name for the action.
5. Optionally, enter a description for the action.
6. Click **Save**.

After you create a send action, create an approval process that includes it.

SEE ALSO:

[Enable Default Email Templates in Case Feed](#)

[Create an Approval Process with the Standard Wizard](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To enable default email templates:

- Customize Application

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create send actions:

- Customize Application

Create Approval Processes for Email Drafts

Approval processes determine how your organization handles draft email messages—specifying, for example, which messages require approval and whether approvers are automatically assigned. Create customized approval processes based on your company's needs.

1. [Enable draft emails.](#)

Though you can create approval processes for email messages without this step, those processes won't be triggered until your organization has email drafts available.

2. [Create a send action.](#)

Send actions ensure that email messages are sent once they've been approved.

3. Create approval processes.

Be sure to choose Email Message from the Manage Approval Processes For: drop-down list.

4. To give certain users, such as senior support agents, the ability to choose whether to submit an email message for approval or simply send the message, assign them to a profile that has the `Bypass Email Approval` permission selected.

SEE ALSO:

[Create an Approval Process with the Standard Wizard](#)

[Enable Default Email Templates in Case Feed](#)

Rename Actions and Feed Filters in Case Feed

Rename Case Feed actions and feed filters so they match the terms your company uses.

For example, if your company refers to your portal as a customer community, you might rename the Portal action "Customer Community."

1. From Setup, enter *Rename Tabs and Labels* in the `Quick Find` box, then select **Rename Tabs and Labels**.
2. Click **Edit** next to Cases in the list of standard tabs.
3. Click **Next**.
4. Find the label you want to change in the Other Labels list.
5. Type the new name for the label in the text box next to it.
6. If the new label begins with a vowel sound, check `Starts with vowel sound`.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create approval processes:

- `Customize Application`

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To rename actions and feed filters:

- `Customize Application`

OR

`View Setup and Configuration`

AND

`Designation as a translator`

Set Up Cases for Lightning Experience

Before your agents can use the case feed and its publisher in Lightning Experience, you must recreate some quick actions. You can also customize the agent experience for case hovers.

Quick actions appear on mobile devices, whereas standard case feed publishers do not. To use the feed-first design on cases, recreate these publishers as quick actions.

IN THIS SECTION:

[Create a Log a Call Quick Action for Cases](#)

Before you can use case feed in Lightning Experience, you must recreate the Log a Call publisher as a quick action.

[Create a Send Email Quick Action for Cases](#)

Create a Send Email quick action to let agents send emails from the case feed in Lightning Experience and the Salesforce app.

[Create a Change Status Quick Action for Cases](#)

Before you can use case feed in Lightning Experience, you must recreate the Change Status publisher as a quick action.

[Create a Change Owner Quick Action for Cases](#)

Make it simpler for agents to reassign cases in Lightning Experience by adding an Update a Record quick action to the case page layout.

[Create a Close Case Quick Action](#)

To give your agents the Close Case action in Lightning Experience, create an action and add it to the case page layout.

[Create a Case Comment Quick Action](#)

To let your agents create case comments from the case feed publisher in Lightning Experience, create a Case Comments quick action and add it to the case page layout.

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

Make actions available to your agents by adding them to the Salesforce Mobile and Lightning Experience Actions section in the case page layout.

[Set Up Mass Quick Actions](#)

Mass quick action lets your users edit up to 100 records in a list view, except for recently viewed lists. You can use mass quick action with cases, leads, accounts, campaigns, contacts, opportunities, work orders, and custom objects in Lightning Experience. To set up mass quick actions, customize an object's search layout. You can perform mass quick actions on only the following quick action types: Create a Record and Update a Record.

[Customize Case Hovers in Lightning Experience](#)

Case hovers give users a sneak peek at the details of a case, including the description and the latest update. Case hovers are enabled by default and appear whenever you hover over a case number, except in list views. For users who work with cases all day, these hovers can save valuable time.

SEE ALSO:

[Guide Users with Path](#)

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up cases for Lightning Experience:

- Manage Cases
- AND
- Customize Application

Create a Log a Call Quick Action for Cases

Before you can use case feed in Lightning Experience, you must recreate the Log a Call publisher as a quick action.

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
2. Click **New Action**.
3. For Action Type, select **Log a Call**.
4. For Standard Label Type, select **Log a Call**.
5. Click **Save**.
6. To choose the fields users see, customize the action's layout.
7. Click **Save**.

After you define the quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

[Set Up Cases for Lightning Experience](#)

[Create Object-Specific Quick Actions](#)

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

Create a Send Email Quick Action for Cases

Create a Send Email quick action to let agents send emails from the case feed in Lightning Experience and the Salesforce app.

You must have Email-to-Case enabled to use the Send Email quick action on the Cases object.

The Send Email quick action is created by default when you enable Email-to-Case on new orgs. If your org was created before Spring '17, or if you enabled Email-to-Case before Spring '17, create a Send Email quick action.

1. Create the Send Email quick action.
 - a. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
 - b. Click **New Action**.
 - c. For Action Type, select **Send Email**.
 - d. For Standard Label Type field, select a label for this action. When you add the action to the case page layout, this label is displayed in the actions bar.
 - e. The **Name** field is auto-filled. This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
 - f. In the **Description** field, describe what this quick action does. The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up cases for Lightning Experience:

- Manage Cases
- AND
- Customize Application

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- Manage Cases AND Customize Application

To edit a page layout:

- Customize Application

The screenshot shows the 'Enter Action Information' dialog box. It contains the following fields and options:

- Object Name:** Case
- Action Type:** Send Email
- Default Email Template:** (Empty field)
- Don't Apply Template Subject:**
- Standard Label Type:** Email
- Name:** Send_Email_Action
- Description:** Lets agents send an email in the Service Console app.
- Icon:** Change Icon

g. Click **Save**.

The email layout page opens, where you can specify the fields shown in the email action.

- 2.** Arrange the email fields in the order that you want. When an agent selects the quick action, the email fields are displayed in this order.
 - a.** From the Email Message Fields menu, drag fields into the email layout. To remove fields, drag them from the email layout to the Email Message Fields section.

The **To Address**, **From** picklist, **Subject**, and **HTML Body** fields are added by default. For information about the fields, see **Fields Available on the Send Email Quick Action for Cases**

The screenshot shows the 'Email Fields' configuration page. It includes a 'Quick Find' search bar and a table of available fields:

Field Name	Field Name	Field Name
Blank Space	From	To
BCC	HTML Body	
CC	Related To	
Email Template	Subject	

Below the table, the following fields are displayed in the layout:

- Subject**
Sample Subject
- HTML Body**
Sample HTML Body
- Related To**
Sample Contract
- Email Template**

- b.** To make a field read-only or required, hover over the field and then click and specify the field properties.

- c. To save the field properties, click **OK**.
 - d. Click **Save**.
3. To ensure that emails are associated with Salesforce records, create predefined field values for the To Recipients, CC Recipients, and BCC Recipients fields.

! **Important:** In new orgs, when you enable Email-to-Case, we automatically configure the To Recipients predefined field value for you, so you can skip this step.

However, if your org was created before Winter '18, or if you enabled Email-to-Case before Winter '18, complete the following steps to create predefined field values. We recommend that you define a value for the To Recipients field.

The case email action provides a predefined field value (the case contact's email address) for the To field. Emails aren't associated with the Salesforce case contact record because this predefined field type is Text (a plain email address with no link to the case contact). To change the default experience and associate emails with Salesforce records, you must create predefined field values.

- a. In the Predefined Field Values section, click **New**.
- b. For Field Name, select one of the following fields:
 - To Recipients
 - CC Recipients
 - BCC Recipients
- c. Use the formula editor to associate your selected field with a Salesforce record using the JUNCTIONIDLIST function.

For values with only one ID, you don't have to use the JUNCTIONIDLIST function.

For example:

- To associate the To Recipients field with the case's contact record, enter:
JUNCTIONIDLIST (Case.ContactId) OR Case.ContactId
- To associate the BCC Recipients field with the case's owner and the owner's manager, enter:
JUNCTIONIDLIST (Case.OwnerId, Case.Owner:User.ManagerId)

- a. Click **Save**.

After you define the quick action, [add it to the case page layout](#) so it's available for agents to use.

Note: Send Email quick actions are not available on cases in templated communities.

To automatically save emails your agents are working on, enable email drafts.

IN THIS SECTION:

[Apply a Default Email Template Using the Send Email Quick Action](#)

Help agents incorporate branding and ensure consistency when writing emails to customers in Lightning Experience and the Salesforce app by using default email templates. Email templates help ensure that agents include common information, such as greetings, announcements, disclaimers, and company contact information, in customer emails.

[Fields Available on the Send Email Quick Action for Cases](#)

After you create an Email quick action for cases, you can customize the fields displayed for the action. Drag fields from the Email Message Fields palette to the email layout.

[Send Email Action Considerations for Cases](#)

Before working with the Send Email action for cases, be aware of these limitations.

[Understand How Default Values for Case Emails Work](#)

There are lots of ways to control the default values your agents see when responding to customer cases using email. Depending on your business needs, you can set up different types of default field values using various methods.

SEE ALSO:

[Enable Email Drafts for Cases](#)

Apply a Default Email Template Using the Send Email Quick Action

Help agents incorporate branding and ensure consistency when writing emails to customers in Lightning Experience and the Salesforce app by using default email templates. Email templates help ensure that agents include common information, such as greetings, announcements, disclaimers, and company contact information, in customer emails.

You must have Email-to-Case enabled to use the Send Email quick action on the Cases object.

Before creating a Send Email quick action that specifies a default email template, create an email template of the type Custom. Only Custom type templates are supported. Attachments specified on an email template aren't supported. However, agents can manually add attachments when they use the email quick action.

1. Create a Send Email quick action or modify an existing Send Email quick action.
 - a. From Setup, enter "Case" in the Quick Find box, then select **Buttons, Links, and Actions**.
 - b. Click **New Action**, or select the quick action that you want to change.
 - c. In the **Action Type** picklist, select **Send Email**.
 - d. In the **Default Email Template** field, click the lookup button and select a template.

Only email templates of the type Custom are shown in the lookup menu.

- e. Optionally, select **Don't Apply Template Subject** to ignore the email template subject.

By default, the Send Email quick action applies the subject specified in the default email template. For example, if the template's subject line is "Thanks for your email," then that subject is applied when the agent uses the email action to write or reply to an email. If **Don't Apply Template Subject** is selected, then the subject defined in the email isn't applied in the email. For example, if a customer sends an email with the subject "Please help," the agent can use the default email template to reply but keep the customer's subject line.

- f. Specify a label for the action. You can use a standard label type, which supplies a default label, or you can select *None* in the **Standard Label Type** field, and specify your own label. When you add the action to the case page layout, this label is displayed in the actions bar.

EDITIONS

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- Manage Cases AND Customize Application

To edit a page layout:

- Customize Application

- g. The `Name` field is automatically populated. This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
 - h. In the `Description` field, describe what this quick action does. The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description, such as "Send Email to Customer with Holiday Branding."
 - i. Click **Save**.
The email layout page opens, where you can specify the fields shown in the email action.
2. Check that you have the appropriate email body field for your template.
The `HTML Body` field is added to the Send Email quick action layout by default. If the Text Body format is needed, it is available.
 3. Click **Save**.
After you define the Send Email quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

- [Add Quick Actions to the Case Page Layout for Lightning Experience](#)
- [Fields Available on the Send Email Quick Action for Cases](#)

Fields Available on the Send Email Quick Action for Cases

After you create an Email quick action for cases, you can customize the fields displayed for the action. Drag fields from the Email Message Fields palette to the email layout.

Table 1: Fields Available on the Send Email Quick Action

Field	Description
Blank Space	Adds empty space to the email layout. This field can be used multiple times within the email layout.
BCC Address	Email header field where agents can enter BCC addresses. If <code>BCC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>BCC Address</code> field is collapsed and appears as a link in the email layout on the case page layout. When an agent clicks the BCC link, the field expands and doesn't collapse again. If the field is required, a red line appears next to it and the field is always expanded. You can only predefine this field to an email address.
CC Address	Email header field where agents can enter CC addresses. If <code>CC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>CC Address</code> field is collapsed and appears as a link in the email layout on the case page layout. When an agent clicks the CC link, the field expands and doesn't collapse again. If the field is required, a red line appears next to it and the field is always expanded. You can only predefine this field to an email address.

EDITIONS

Available in: Lightning Experience

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

Field	Description
From	<p>Email header field where agents can enter a From email address from a picklist (dropdown list).</p> <p>Agents can select from org-wide email addresses, Email-to-Case email addresses, and the agent's own email address.</p> <p>The From picklist is added by default in the Send Email action in new orgs created in Winter 17 or later. If you create a Send Email action after Winter 17, then the From picklist is added to the email layout by default.</p>
From Address	Email header field where agents can enter a From email address. The From Address field is a text field.
HTML Body	<p>Email body field that supports HTML formatting and images.</p> <p>If you set a default email template that contains HTML formatting on the Send Email quick action, then add the HTML Body field to the email layout.</p>
Is Externally Visible	<p>If the community case feed is enabled, IsExternallyVisible controls the external visibility of emails in communities.</p> <p>For more information, see EmailMessage in the API Guide.</p>
Parent Case	Field for the parent case record ID.
Related To	<p>Field for the record ID of related objects, such as accounts, opportunities, campaigns, cases, or custom objects.</p> <p>For more information, see EmailMessage in the API Guide.</p>
Subject	Email header field where agents can enter a subject.
Text Body	Email body field that supports only plain text.
To Address	<p>Email header field where agents can enter To email addresses.</p> <p>You can only predefine this field to an email address.</p>

SEE ALSO:

[Create a Send Email Quick Action for Cases](#)

[Apply a Default Email Template Using the Send Email Quick Action](#)

Send Email Action Considerations for Cases

Before working with the Send Email action for cases, be aware of these limitations.

As of Spring '17, the Lightning Email Composer has been replaced with a new Send Email action.

The old Send Email action no longer displays to end users. It remains in existing page layouts, but isn't in the page layout editor palette. If you remove the action from a page layout, you can't add it back.

 **Tip:** How do you tell the difference between the new and old Send Email actions? Hover your mouse over a Send Email action in the page layout editor palette. The new action has its Action Type listed as Quick Action.

EDITIONS

Available in: **Lightning Experience**

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

General

- You can't add custom fields or rename existing fields in the Send Email action.
- The `From` field is required.
If the `From` field isn't on the Send Email action layout, it must have a predefined value set.
- HTML Body content is required; Text Body content is only supported on the case-specific Send Email action.
If the HTML Body field isn't on the Send Email action layout, it must have a predefined value set.
- Org-wide email addresses can't be used with Salesforce Inbox.
- The Send Email action isn't available in Communities.
- The `Related To` field can't be set to Cases in the global Send Email action.
- To see the Email tab in the activity composer, set **Email Deliverability** to All Email.
- For each email in the case feed, agents see a dropdown menu with reply options. If you have multiple email actions in the case feed publisher, agents see groups of reply actions in the dropdown menu.

Cases

- Turn on Email-to-Case to enable the case-specific Send Email action on cases.
- Only the case-specific Send Email action can be added to cases.
- You can't send emails associated to cases from the Global Actions menu.

Predefined Values

- The `To Address`, `CC Address`, and `BCC Address` fields only accept email addresses as predefined values. Use string fields, such as `Contact.custom_email_field`.

 **Note:** Emails sent with only email addresses specified aren't associated with Salesforce records.

- The `To Recipients`, `CC Recipients`, and `BCC Recipients` fields accept a list of Salesforce IDs using the `JUNCTIONIDLIST` function. Use ID fields, such as `Contact.Id`.

Emails sent with these predefined fields ensure that emails are associated with Salesforce records. For example, like the case's contact record. You can use the `To Recipients`, `CC Recipients`, and `BCC Recipients` fields to send emails to multiple contacts and users. The fields work only with the email action for cases.

- You can only predefine `Related To` for an entity-specific quick action, not a global quick action.
- Predefined values aren't supported in Reply/Forward or emails initiated from the Assistant or Opportunity Insights.

- If Compliance BCC is enabled, predefined values for the BCC field are ignored. If Auto BCC is enabled, predefined values for the BCC field are appended to the Auto BCC address.
- If an admin removes the BCC field from the layout, Auto BCC doesn't populate the user's email address in the email.
- An admin's configuration takes precedence over Auto BCC. If an admin specifies a predefined BCC value, the email is populated with the predefined value and not the Auto-BCC email address.

SEE ALSO:

- [Configure Deliverability Settings for Emails Sent from Salesforce](#)
- [Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce](#)
- [Notes on Predefined Field Values for Quick Actions](#)

Understand How Default Values for Case Emails Work

There are lots of ways to control the default values your agents see when responding to customer cases using email. Depending on your business needs, you can set up different types of default field values using various methods.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Set Defaults With...	Best For...	Priority of Execution
Apex QuickActionDefaultsHandler interface	Use this Apex interface to override email field values based on complex logic. For example, you can use this Apex interface to apply a specific email template and BCC a manager on high priority cases. For set up information, see the QuickActionDefaultsHandler Interface in the <i>Apex Developer Guide</i> .	1 Defaults set with this interface override all other default settings.
Predefined Field Values set up for the Email quick action	Use predefined field values for adding people to email threads. You can also use predefined field values to ensure that emails are associated with Salesforce records. For set up information, see Create a Send Email Quick Action for Cases .	2 If the Apex interface isn't configured for a field specified using predefined field values, these values populate next.
Automatic Reply, Reply All, and Forward field values	Use these carry-over fields for basic email functionality. When an email is in response to an existing email, field values like the To, From, Subject, and Body fields are auto-populated with the previous values. This functionality is provided out-of-the-box and doesn't require configuration.	3 Carry-over fields from a previous email populate next.

Set Defaults With...	Best For...	Priority of Execution
Default Email Template set up for the Email quick action	Use the Default Email Template setting on the Email quick action to always apply a custom email template to the body of the email. Setting up a default template helps your agents send consistent messages quickly. For set up information, see Apply a Default Email Template Using the Send Email Quick Action .	4 If the body of the email hasn't been populated by the Apex interface or by a Reply, Reply All, or Forward message, the default email template is applied next.

Create a Change Status Quick Action for Cases

Before you can use case feed in Lightning Experience, you must recreate the Change Status publisher as a quick action.

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
2. Click **New Action**.
3. For Action Type, select **Update a Record**.
4. For Standard Label Type, select **Change Status**.
5. Click **Save**.
6. To choose the fields users see, customize the action's layout.
7. Click **Save**.

After you define the quick action, [add it to the case page layout](#) so it's available for agents to use.

SEE ALSO:

- [Set Up Cases for Lightning Experience](#)
- [Create Object-Specific Quick Actions](#)
- [Add Quick Actions to the Case Page Layout for Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up cases for Lightning Experience:

- Manage Cases
- AND
- Customize Application

Create a Change Owner Quick Action for Cases

Make it simpler for agents to reassign cases in Lightning Experience by adding an Update a Record quick action to the case page layout.

Cases can be reassigned to the following:

- User
- Queue
- Community partner user
- Community portal user

In Lightning Experience, you must create the Change Owner action for cases. Use the following steps:

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
2. Click **New Action**.
3. For Action Type, select **Update a Record**.
4. For Standard Label Type, select **None**.
5. For Label, enter the name you want to display in the publisher.
For example, *Transfer Case* or *Update Case Owner*.

6. The Name field is auto-filled.

This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.

7. For Description, describe what this quick action does.

The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description.

8. Click **Save**.

The action layout page opens, where you can specify the fields shown in the quick action.

9. In the action layout, drag the `Case Owner` field from the palette into the quick action layout.

To make a field read-only or required, click the wrench icon and specify the field properties.

10. Click **Save**.

After you define the quick action, add it to the case page layout so it's available for agents to use.

To let your agents send the new case owner an email, enable Notify Case Owner of New Case Comments from the Support Settings page in Setup.

SEE ALSO:

[Add Quick Actions to the Case Page Layout for Lightning Experience](#)

[Customize Support Settings](#)

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and modify the Send Email quick action:

- Manage Cases AND Customize Application

To edit a page layout:

- Customize Application

Create a Close Case Quick Action

To give your agents the Close Case action in Lightning Experience, create an action and add it to the case page layout.

The Close Case button is included with Salesforce Classic. However, you must create it in Lightning Experience.

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
2. Click **New Action**.
3. For Action Type, select **Update a Record**.
4. For Standard Label Type, select **None**. For Label, enter *Close Case*. The Name field is auto-filled. Optionally, enter a description and success message.

5. Click **Save**.
6. To customize the action layout to display only the Status and Internal Comments fields, remove the other fields, and click **Save**.

7. In the Predefined Field Values section, click **New**.
8. Assign the Status field the **Closed** field value, and click **Save**.

9. Go to the Case Page Layouts setup page, and [edit your case layout](#).

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

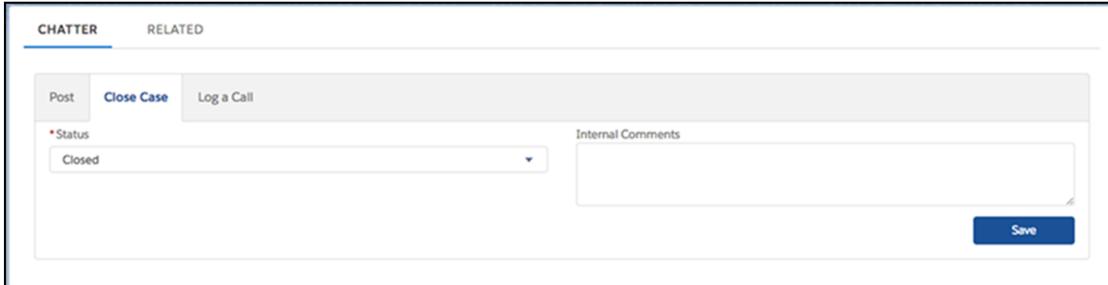
To set up cases for Lightning Experience:

- Manage Cases
- AND
- Customize Application

Drag the new quick action to the Salesforce Mobile and Lightning Experience Actions section, and click **Save**.

When an agent clicks the action from the Service Console, the Status field displays Closed. Agents can now close a case with two clicks—one for the action button and one to save.

 **Example:**



The screenshot shows a Salesforce interface with a 'CHATTER' tab selected. Below the tab are two buttons: 'Close Case' and 'Log a Call'. The 'Close Case' button is highlighted. Below the buttons is a form with a '*Status' dropdown menu set to 'Closed' and an 'Internal Comments' text area. A 'Save' button is located at the bottom right of the form.

SEE ALSO:

[Create a Case Comment Quick Action](#)

[Define Apex Triggers](#)

Create a Case Comment Quick Action

To let your agents create case comments from the case feed publisher in Lightning Experience, create a Case Comments quick action and add it to the case page layout.

In Salesforce Classic, you can add the Internal Comments field, which created Case Comments, to the Close Case button. Your agents can then close a case and add a case comment at the same time.

In Lightning Experience, the Internal Comments field isn't available, so you must create a separate quick action for closing a case and one for creating a case comment.

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Buttons, Links, and Actions** setup page.
2. Click **New Action**.
3. For Action Type, select **Create a Record**.
4. For Target Object, select **Case Comment**.
5. For Standard Label Type, select **None**. For Label, enter *Case Comment*. The Name field is auto-filled. Optionally, enter a description and success message.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up cases for Lightning Experience:

- Manage Cases

AND

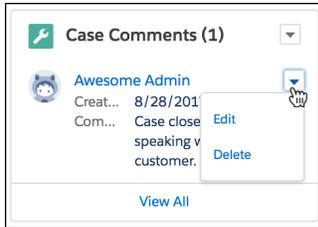
Customize Application

6. Click **Save**.
7. To choose the fields users see, customize the action's layout, and click **Save**.
Keep these things in mind.
 - The Body field is always required, even if Required isn't selected in its Field Properties dialog (invoked when you double-click the field).
 - The Public field is available only if you have Communities enabled.
 - The Public field is labeled "Published" in the quick action layout editor.
8. Go to the Case Page Layouts setup page, and [edit your case layout](#).
Drag the new quick action to the Salesforce Mobile and Lightning Experience Actions section, and click **Save**.

When agents click the action from the Service Console, they see:

 **Example:**

-  **Tip:** In the Lightning App Builder, you can add the Case Comments related list to the case page. Then your agents can also create case comments directly from the related list using the New button. They can also edit and delete comments.



Add Quick Actions to the Case Page Layout for Lightning Experience

Make actions available to your agents by adding them to the Salesforce Mobile and Lightning Experience Actions section in the case page layout.

You can add standard actions and custom actions to the page layout. When you create a custom action, it appears in the palette.

You can drag and drop actions from the palette to the page layout.

1. From Setup, click the **Object Manager** tab. Select **Cases**, and open the **Case Page Layouts** setup page.
2. Select the page layout that you want to add the action to, and click **Edit**.
3. Add quick actions to the case page layout.
 - a. Click **Mobile & Lightning Actions**.
 - b. Drag the action into the Salesforce Mobile and Lightning Experience Actions section, and place the action where you want it to appear.

EDITIONS

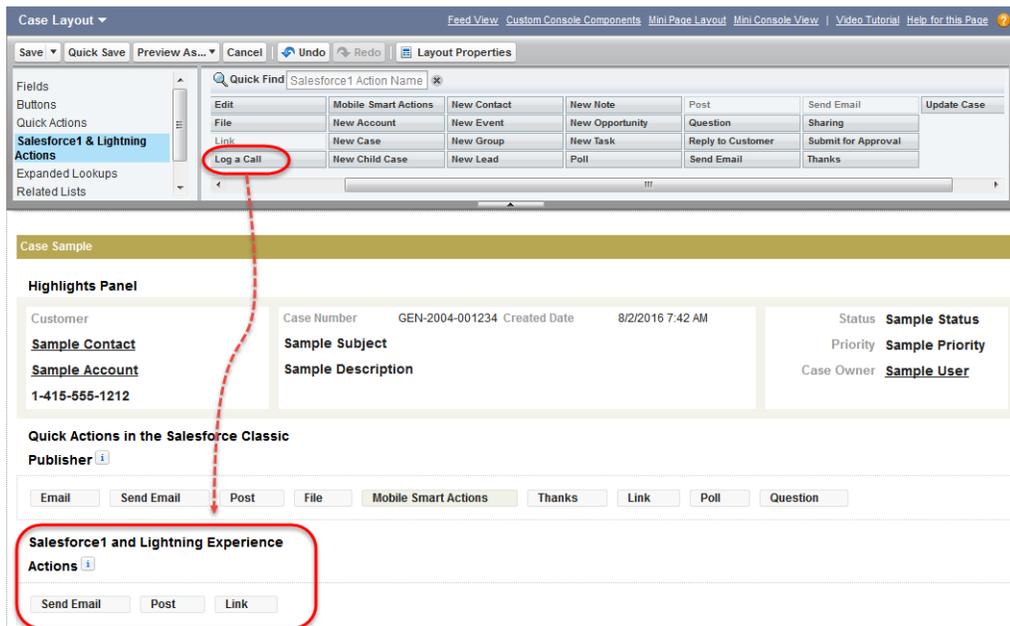
Available in: Lightning Experience

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

USER PERMISSIONS

To edit a page layout:

- Customize Application



- c. Click **Save**.

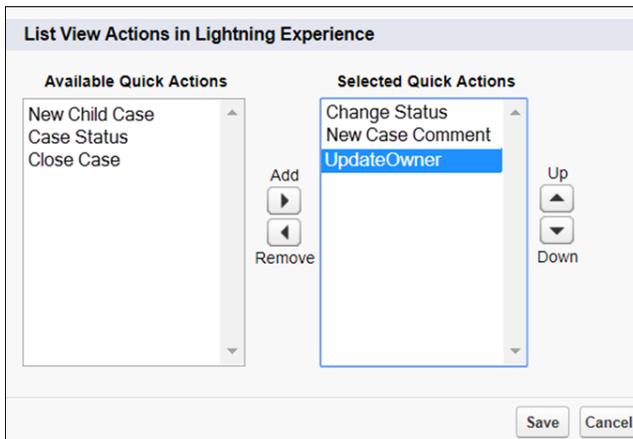
Set Up Mass Quick Actions

Mass quick action lets your users edit up to 100 records in a list view, except for recently viewed lists. You can use mass quick action with cases, leads, accounts, campaigns, contacts, opportunities, work orders, and custom objects in Lightning Experience. To set up mass quick actions, customize an object's search layout. You can perform mass quick actions on only the following quick action types: Create a Record and Update a Record.

 **Note:** Before setting up mass quick actions, make sure that you:

- Set up quick actions for your objects. These actions are the ones that you want users to perform on multiple records in a list view. Keep in mind that mass quick actions only work with quick actions that create or update a record.
- Review the [Mass Quick Action Considerations](#).

1. Set up quick actions for your objects.
2. From Setup, click the **Object Manager** tab.
3. Select the object you want to allow mass quick actions on, and customize the object's list view layout under the **Search Layouts** setup page.
In this example, we selected the case object.
4. Edit the List View layout.
5. In the List View Actions in Lightning Experience section, add the actions you want your users to be able to perform on list views for multiple records.



EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up mass quick actions for Lightning Experience:

- Manage Cases
AND
Customize Application

Mass Quick Action Considerations

Review these guidelines and other supplemental information before you set up and use mass quick actions on list views.

Considerations

- When updating multiple records, only the fields manually modified by the user are changed. This behavior ensures that no accidental overwrite of existing values occurs. Thus, any predefined values are displayed as a glimpse when editing more than a couple of records. The actual value is not changed without the user changing them.
- Like performing a single action, there is no mass undo for a bulk action. Be careful when making multiple changes.
- We recommend using predefined values to guide the user's input.
- When the user selects only a single record, the values changed are what they see in their interface and any predefined values are also changed. The same is true for quick actions on records.
- The Metadata API, Tooling API, AppExchange, and Changesets are currently not supported for deploying mass quick actions to Search Layouts.
- Mass quick actions are available only in Lightning Experience apps, including apps with standard and console navigation.
- If you created Notes as a quick action, they are not available for bulk actions.

SEE ALSO:

[Set Up Mass Quick Actions](#)

Customize Case Hovers in Lightning Experience

Case hovers give users a sneak peek at the details of a case, including the description and the latest update. Case hovers are enabled by default and appear whenever you hover over a case number, except in list views. For users who work with cases all day, these hovers can save valuable time.

Case hovers work in all Lightning apps, including apps with standard navigation and console navigation. These hovers are specific to cases only and don't work for any other objects.

To make sure that your users get the most out of case hovers, you can edit the case's compact layout to customize which fields appear in the hover.

There are three sections in the case hover: title and top fields, description, and the latest update.

Title and Fields

The top section of the hover displays the same information that's displayed in the case's Highlights Panel in the case record home. Only the first five fields are displayed. The first field is displayed at the title of the hover.

-  **Note:** The Highlights Panel and the case hover use the same compact layout. When you customize the compact layout, you affect both the Highlights Panel and the case hover.

To customize the title and fields displayed in the case hover, edit the case's compact layout.

1. From Setup, at the top of the page, select **Object Manager**.
2. Select **Case** and then click **Compact Layouts**.
You can create a new compact layout or edit the default layout.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up mass quick actions:

- Manage Cases
AND
Customize Application

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To customize compact layouts:

- Customize Application

To view compact layouts:

- View Setup and Configuration

3. Add the fields that you want displayed in the hover.

Keep in mind that the hover displays only the first five fields, and the first field becomes the title. We recommend using the Subject as the first field in your compact layout.

4. Sort the fields by selecting them and clicking **Up** or **Down**.

The order you assign to the fields determines the order in which they display.

5. Save the layout.

6. If you created a new layout, click **Compact Layout Assignment** to set the compact layout as the primary compact layout for the object.

You can't customize the description and latest update sections.

Description

Displays the case's description. If a case doesn't have a description, the hover doesn't include this section.

Latest Update

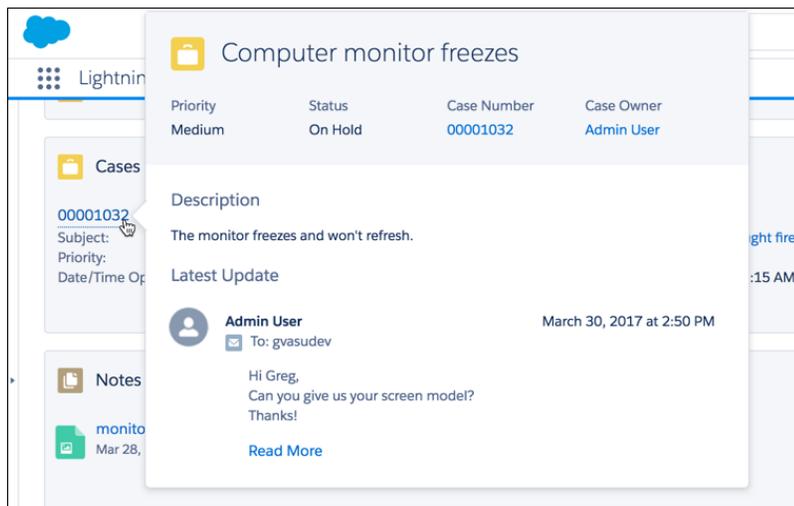
The Latest Update section of the hover displays the latest post or the most recent activity on the case feed. The case feed's sort order determines which one is displayed in the hover. Whenever you change the sort order in a case feed, the hover is updated too.

However, case feed filters don't affect what's displayed in the case hover. For example, if you filter a case feed for emails, the case hover still shows the latest update even if it's not an email.

To make sure that your users see the same latest update in the hover and on the case record page, use the Chatter component in the Lightning App Builder when editing your page. If instead you use the Chatter Feed component and filter it to display only certain feed types, your users will see inconsistent updates when looking at the record page versus the hover.

The Latest Update section can display only one post. All post types are supported. For example, if the latest post was a post from a social channel like Facebook, that's what displays in the hover.

Here's what the default case hover looks like.



SEE ALSO:

[Compact Layouts](#)

Manage and Work with Cases

To keep customers happy, learn how to manage and work with cases. After a case is opened, you update the customer and case details, then you ultimately close and resolve the customer issue.

IN THIS SECTION:

[Create and Open Cases](#)

Create and open cases to track customer issues. You can clone a case and search for other cases before opening one. Your organization can even use Web-to-Case or Email-to-Case to create cases from customer logged issues.

[Update and Respond to Cases](#)

Keeping a customer updated on their case's progress is key to quality customer service. To ensure that each case is answered, you can reassign and share cases with other agents. While the case feed makes responding to customers painless.

[Email Customers](#)

Respond to your customers using email directly from the case record page. To stay efficient, you can insert and create email templates, use quick text, and merge fields.

[Solve and Close Cases](#)

Closing a case means that a customer's issue has been resolved.

[Things to Know About Cases](#)

Review these guidelines and other supplemental information when you use cases.

Create and Open Cases

Create and open cases to track customer issues. You can clone a case and search for other cases before opening one. Your organization can even use Web-to-Case or Email-to-Case to create cases from customer logged issues.

IN THIS SECTION:

[Create Cases](#)

You can create cases in various ways

[Clone Cases](#)

Clone a case to generate a new case using information from the existing case.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

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 143.

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 ([not available in all orgs](#))

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:

[Clone Cases](#)

[Case Fields](#)

[Solve Cases](#)

Clone Cases

Clone a case to generate a new case using information from the existing case.

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

In new orgs, the **Clone** button is available on the Cases page layout by default. In existing orgs, add the Clone quick action to the page layout.

1. Click **Clone** on an existing case.
2. Enter or change any information for the new case.
3. Check the box and 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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To clone cases:

- Create on cases

Update and Respond to Cases

Keeping a customer updated on their case's progress is key to quality customer service. To ensure that each case is answered, you can reassign and share cases with other agents. While the case feed makes responding to customers painless.

IN THIS SECTION:

[Viewing Case Lists](#)

The cases list page displays a list of cases in your current view.

[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.

[Assigning Cases](#)

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

[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.

[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.

[Case Comments](#)

Case comments let you and your support agents add, edit, and delete public and private comments on a case. All comments appear in the Case Comments related list.

[Creating and Editing Case Comments](#)

You can create and edit case comments to leave notes for a case.

[Use Case Feed](#)

Case Feed streamlines the way you create, manage, and view cases. It includes case actions like creating case notes, logging calls, changing the case status, and communicating with customers in a Chatter feed. Case Feed displays important case events in chronological order, so it's easy to see the progress of each case.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

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:

[What's a Case?](#)

[Guidelines for Working with Cases](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view case lists:

- Read on cases

To create cases:

- Create on 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 (not available in all orgs)

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

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)**

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

The case assignment options vary according to which Salesforce Edition you have.

USER PERMISSIONS

To view cases:

- Read on cases

To take ownership of cases from queues:

- Edit on cases

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.

Assigning cases to a case queue is only available in Salesforce Tabs + Visualforce communities.

SEE ALSO:

[Guidelines for Working with Cases](#)

[Changing Multiple Cases](#)

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.
- 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.

SEE ALSO:

[What's a Case?](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view cases:

- Read on cases

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.

 **Important:** The Case Milestones related list is supported only in Salesforce Classic.

Keep the following things in mind when working with the related list.

- `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 see some or all the following fields.
- Customer Portal users can't edit case milestones.

Action

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

Milestone

The name of a set of steps in an entitlement process that applies to the case. Users with 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 completed 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 <code>High</code> when a First Response milestone is near violation.

EDITIONS

Available in both: Salesforce Classic

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

USER PERMISSIONS

To view case milestones:

- Read on cases

To edit case milestones:

- Edit on cases

Workflow Action	What It Does	Example
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a First Response milestone is completed.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

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](#)

[What's Entitlement Management?](#)

Case Comments

Case comments let you and your support agents add, edit, and delete public and private comments on a case. All comments appear in the Case Comments related list.

Comments can remain private or be made publicly available to a case's contact on the Customer Portal, Self-Service portal, or Chatter Answers. You can also set up your portal or community to let customers comment on their cases. When a portal user adds a comment, the case owner receives an email. A comment icon () remains on the case heading until the case owner views it.

 **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:

[Creating and Editing Case Comments](#)

Creating and Editing Case Comments

You can create and edit case comments to leave notes for a case.

You can create or edit a case comment from two places.

IN THIS SECTION:

[Create and Edit Case Comments on Case Detail Pages](#)

[Create and Edit Case Comments on Case Edit Pages](#)

SEE ALSO:

[What's a Case?](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, 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

Create and Edit 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:

[Case Comments](#)

[Creating and Editing Case Comments](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, 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

Create and Edit 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:

[Case Comments](#)

[Creating and Editing Case Comments](#)

Use Case Feed

Case Feed streamlines the way you create, manage, and view cases. It includes case actions like creating case notes, logging calls, changing the case status, and communicating with customers in a Chatter feed. Case 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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, 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

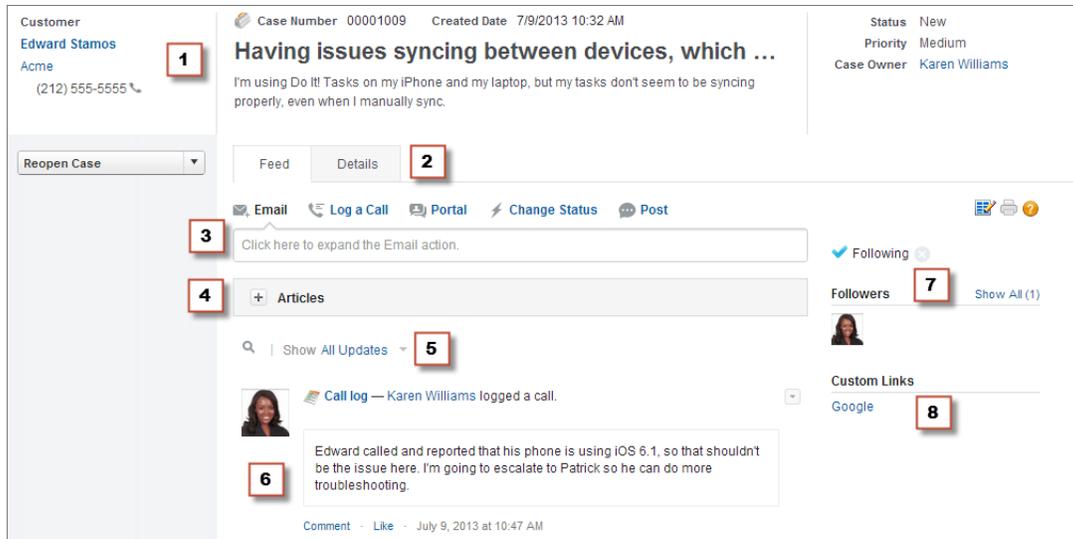
To edit, delete, or make public your existing case comments:

- Edit Case Comments

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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



- **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

IN THIS SECTION:

[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.

[Use 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.

[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.

[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.

[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.

[Printable View in Case Feed](#)

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

SEE ALSO:

[Insert and Use Quick Text](#)

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.

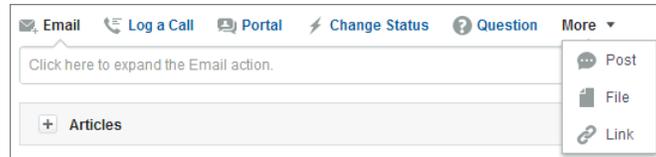
Actions appear in the publisher at the top of the feed.

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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



- 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:

[Use Case Feed](#)

Use 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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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:

[Use Case Feed](#)

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	<ul style="list-style-type: none"> • Email action in the publisher • Emails related list
Viewing emails	<ul style="list-style-type: none"> • Email feed items • Activity History related list • Emails related list

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

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

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	<ul style="list-style-type: none"> • Articles tool (to attach Salesforce Knowledge articles)

Task	Case Feed Feature Agents Use for this Task
	<ul style="list-style-type: none"> • Attachments related list
Attaching files to an email	<ul style="list-style-type: none"> • Email action in the publisher • Emails related list
Viewing files attached to a case	<ul style="list-style-type: none"> • 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

Task	Case Feed Feature Agents Use for this Task
------	--

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	<ul style="list-style-type: none"> Email action in the publisher Emails related list
--------------------------	--

Viewing emails	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Create Task action in the publisher Open Activities related list
----------------------------	---

Viewing tasks	<ul style="list-style-type: none"> Task feed items (for tasks created with Create Task action) Open Activities related list
---------------	---

Creating and editing events	<ul style="list-style-type: none"> Create Event action in the publisher Open Activities related list
-----------------------------	--

Viewing events	<ul style="list-style-type: none"> 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

Finding solutions

Solutions related list

SEE ALSO:

[View and Edit Cases from the Case Detail Page in Case Feed](#)

[Printable View in Case Feed](#)

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 ([not available in all orgs](#))

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

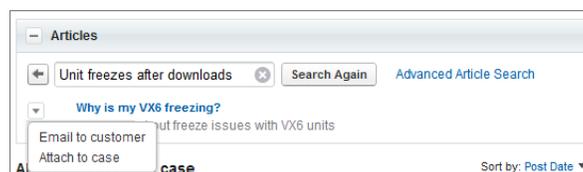
USER PERMISSIONS

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.

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



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:

[Use Case Feed](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view a case:

- View on cases

To edit a case:

- Edit on cases

To delete a case:

- Delete on cases

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create case posts in customer portals or communities:

- Edit on cases

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 in the Salesforce Classic Case Feed Use Case 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.

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.

SEE ALSO:

[View and Edit Cases from the Case Detail Page in Case Feed](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Email Customers

Respond to your customers using email directly from the case record page. To stay efficient, you can insert and create email templates, use quick text, and merge fields.

 **Note:** To email customers from the Service Console, Email-to-Case must be enabled in your org.

IN THIS SECTION:

[Email Customers in Lightning Experience](#)

Work with email in the case feed publisher in Lightning Experience.

[Email Customers in Salesforce Classic](#)

Work with email in the case feed in Salesforce Classic.

[Merge Fields for Cases](#)

The list of available email template merge fields in the Salesforce Merge Language depends on the type of data that you're working with. Most of the merge fields for cases correspond directly with a case field.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Email Customers in Lightning Experience

Work with email in the case feed publisher in Lightning Experience.

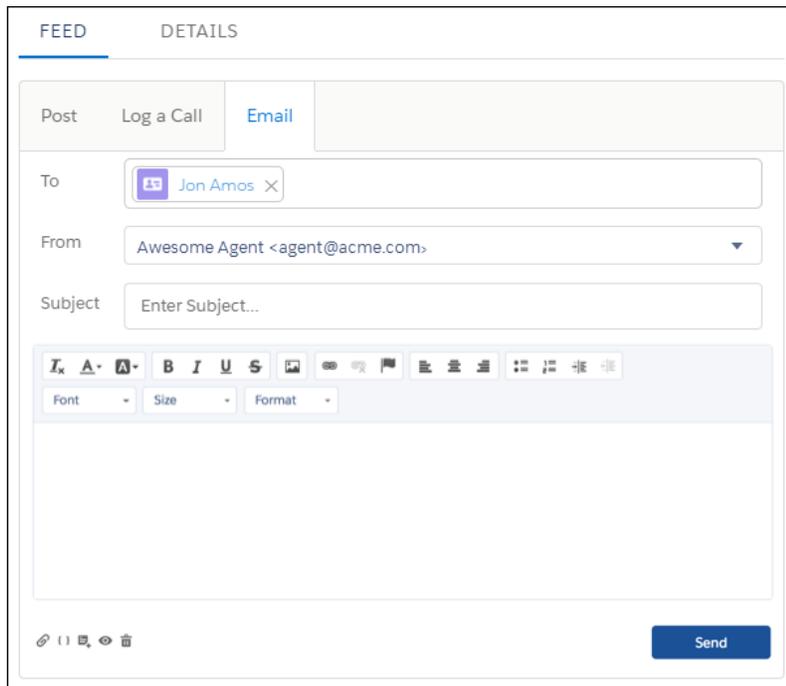
 **Note:** To email customers from the Service Console app in Lightning Experience, Email-to-Case must be enabled in your org.

On a case page in the console, click **Email** in the case feed publisher to get started. You can insert merge fields, preview emails, and clear emails from the publisher. You can also insert Salesforce Classic and Lightning Experience email templates, attach files, and remove attachments if you change your mind.

EDITIONS

Available in: Lightning Experience

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



Here are some things to keep in mind when working with emails in Lightning Experience.

Attachments

To attach multiple files from your computer, drag the files to the body of the email. You can drag as many files as you want, but the files can't be more than 2 GB. To attach files uploaded in Salesforce, use the attachment icon.

Merge fields

Merge fields resolve only on send and preview. The field appears as plain text when inserted into the publisher.

 **Tip:** You can insert merge fields not listed in the dialog box. Such as merge fields for accounts or contacts. Enter them as plain text and use the preview button to review before sending.

Email templates

You can insert Lightning Experience and Salesforce Classic templates. However, Visualforce email templates for Salesforce Classic aren't supported. When you insert a template, the subject is replaced with the template's subject. You can also create Lightning Experience templates directly from the publisher.

Email drafts

A working draft of your email is saved every few seconds when you compose, reply, or forward an email. You can leave it and return to it at any time.

 **Note:** Email drafts are private and can't be shared. You can have only one draft per case. If you're working on a case with an auto-saved draft, you can't write another email until that draft is sent or discarded. Your Salesforce admin must enable email drafts.

Preview emails

Use preview to review an email and its merge fields before sending.

Delete and clear emails

The trash icon deletes the working draft and resets the fields to the original state.

When email drafts aren't enabled, this action clears the body, subject, and added recipients, reverting the email to its original state. When email drafts are enabled, it deletes the draft and then reverts.

Keep in mind that your Salesforce admin can customize the email experience for cases. See [Create a Send Email Quick Action for Cases](#).

SEE ALSO:

[Email Templates in Lightning Experience](#)

[Access and Sharing for Email Merge Fields, Templates, and Attachments in Lightning Experience](#)

[Considerations for Using Merge Fields in Email Templates](#)

[Merge Fields for Cases](#)

Email Customers in Salesforce Classic

Work with email in the case feed in Salesforce Classic.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

IN THIS SECTION:

[Working with Case Emails in Salesforce Classic](#)

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 in the Salesforce Classic 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 the Salesforce Classic 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 the Salesforce Classic 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 the Salesforce Classic 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 in the Salesforce Classic Case Feed](#)

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 the Salesforce Classic 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.

Working with Case Emails in Salesforce Classic

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view cases:

- Read on cases

To work with case emails:

- Edit on cases

- 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. For inbound email messages, if you want to see the entire email header, click the **Click here to view original email headers** link on the email detail page.
- 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 <code>Subject</code> field display in bold for emails with a <code>New Status</code> .
Read 	An inbound email that has been read but not replied to.
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 in the Salesforce Classic 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:

EDITIONS

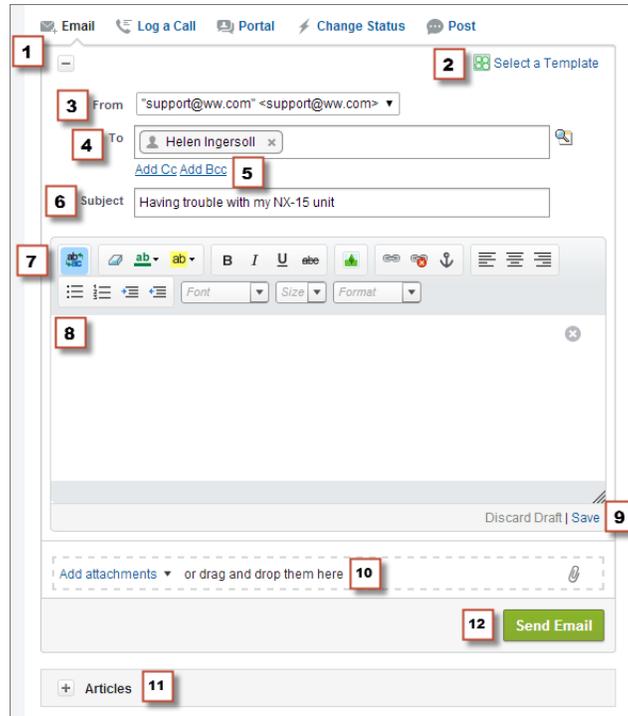
Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To send emails:

- Send Email



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  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  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, type `;/` to insert one.
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](#)

[Use Case Feed](#)

[Send and Receive Emails with Email-to-Case](#)

[Enable Case Feed Actions and Feed Items](#)

Add Images and Files to Email Messages in the Salesforce Classic 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.

- 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, .jpeg, .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.
- 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 in the Salesforce Classic Case Feed](#)

[Find, Attach, and Email Articles with the Case Feed Articles Tool](#)

[Customize Emails with the Rich Text Editor in the Salesforce Classic Case Feed](#)

EDITIONS

Available in: **Salesforce Classic** (not available in all orgs)

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

USER PERMISSIONS

To send emails with attachments or inline images:

- Send Email

Use Email Templates in the Salesforce Classic 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.](#)

Work with Draft Emails in the Salesforce Classic 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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To send emails

- Send Email

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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 in the Salesforce Classic Case Feed](#)

Review and Approve Email Drafts in the Salesforce Classic Case Feed

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 the Salesforce Classic Case Feed](#)

[Enable Default Email Templates in Case Feed](#)

[Create Approval Processes for Email Drafts](#)

Customize Emails with the Rich Text Editor in the Salesforce Classic 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 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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To review and approve email drafts:

- Send Email
- AND
- Inclusion in an email approval process

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To send emails:

- Send Email

- To delete a message, click  .

Merge Fields for Cases

The list of available email template merge fields in the Salesforce Merge Language depends on the type of data that you're working with. Most of the merge fields for cases correspond directly with a case field.

 **Tip:** To reference the contact or account associated with a case, use the relevant contact or account merge fields.

In Lightning Experience, you can insert merge fields as plain text in the email publisher. Keep in mind that merge fields resolve only on preview and send.

This table explains the more advanced merge fields that represent values derived from processing a case record.

Field	Merge Field	Description	Works in Lightning Experience
Articles as PDFs	Case.Articles_as_PDFs	Articles associated with the case converted to PDF attachments. In the Emails related list on the case detail page, users can click Send an Email and choose a template containing this merge field. The attachments can be previewed or deleted before the email is sent.	No
Email Thread	Case.Email_Thread	A thread of all emails where the case contact is a sender or recipient (To, CC, or BCC). The emails are listed in reverse chronological order so the most recent emails appear at the top of the thread. The thread inserts the text version of the emails. You can't use this merge field in Visualforce pages. The limits for the email thread are: <ul style="list-style-type: none"> Maximum number of emails: 200 Email body truncation size: 32 KB 	Yes ¹

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

The available merge fields vary according to which Salesforce edition you have.

Field	Merge Field	Description	Works in Lightning Experience
Last Case Comment	Case.Last_Case_Comment	The description of the most recent comment to be created on a case.	No
Solution Attachments	Case.Solution_Attachments	Attachments for the case solution.	No
Solution Description	Case.Solution_Description	The details of the solution associated with the case. If more than one solution is associated with the case, the description of each solution appears in a list.	Yes
Solution Subject	Case.Solution_Subject	The title of the solution associated with the case. If more than one solution is associated with the case, the title of each solution appears in a list.	Yes
Solution Subject and Description	Case.Solution_Subject_and_Description	The title and details of the solution associated with the case. If more than one solution is associated with the case, the title and description of each solution appears in a list.	Yes
Suggested Solutions	Case.Suggested_Solutions	Links to the subject and description of each suggested solution that may help customers solve their issues.  Note: Sending mass emails using templates with the suggested solutions merge field can take several minutes and isn't recommended.	No
Case Thread Id	Case.Thread_Id	A unique identifier for the case email thread in Email-to-Case. The thread ID is the unique ID of each case email, such as [ref:_DV0Tx._500V0U9YB:ref]. By default, the thread ID is added to both the subject and body of case emails. The default location for the thread ID is at the end of the body. Use this merge field to position it elsewhere in the body.	Yes

Notes on Merge Fields for Cases

Email Thread

¹ This merge field works in Lightning Experience when inserted as plain text. However, it doesn't work in email templates.

Merge fields for entitlements on cases

Merge fields for entitlements on cases aren't supported. For example, if you add the `Entitlement Name` `{!Case.Entitlement}` merge field to an email template, the field is not populated on the template.

Merge fields for Email-to-Case or On-Demand Email-to-Case

If you have enabled Email-to-Case or On-Demand Email-to-Case, you can create email templates that support agents can use to respond to case emails. These templates can include merge fields that display information from the original email in the response. See [Email Templates in Salesforce Classic](#).

Merge fields for Web-to-Case

To reference the name, email, phone, or company of the customer who submitted an online case with Web-to-Case, use the relevant `{!Case_OnlineCustomer...}` field.

SEE ALSO:

[Considerations for Using Merge Fields in Email Templates](#)

[Merge Field Tips](#)

[Email Templates](#)

Solve and Close Cases

Closing a case means that a customer's issue has been resolved.

IN THIS SECTION:

[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.

[Solve Cases](#)

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

[Deleting 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.

[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.

[Sending Articles from Cases](#)

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

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

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](#)

Solve 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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To close cases:

- Edit on cases

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To solve cases:

- Edit on cases

AND

Read on solutions

5. [Close the case.](#)

SEE ALSO:

- [Suggested Solutions Overview](#)
- [Multilingual Solutions Overview](#)

Deleting 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.

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.

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:

- [What’s a Case?](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To delete cases:

- Delete on cases

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**.

SEE ALSO:

[Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To change support settings:

- Manage Cases
- AND
- Customize Application

To view articles:

- Read on the article's article type

Sending Articles from Cases

USER PERMISSIONS

To set up Email-to-Case or On-Demand Email-to-Case:	Customize Application
To enable Email-to-Case or On-Demand Email-to-Case:	Modify all Data AND Customize Application
To customize page layouts:	Customize Application
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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

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.

SEE ALSO:

[Salesforce Knowledge](#)

Things to Know About Cases

Review these guidelines and other supplemental information when you use cases.

IN THIS SECTION:

[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.

[Cases Home](#)

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

[Case Fields](#)

Case records contain information about the case progress and its associated records. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

[Case History](#)

The Case History related list on 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.

[Case Hierarchies](#)

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 both: Salesforce Classic and Lightning Experience

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

Related Cases

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.

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 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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) 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

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:

[Case Fields](#)

[Case History](#)

[What's a Case Team?](#)

[Case Comments](#)

[Assigning Cases](#)

[Working with Case Emails in Salesforce Classic](#)

[Using the Case Milestones Related List](#)

[Using the Chatter Answers Q&A Tab](#)

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view cases:

- Read on cases

To create cases:

- Create on cases

Case Fields

Case records contain information about the case progress and its associated records. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

 **Important:** Some of these fields aren't supported in Lightning Experience.

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.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Field	Description
	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.
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.

Field	Description
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	<p>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:</p> <ul style="list-style-type: none"> • Completed milestones aren’t affected • Incomplete milestones are recalculated based on the new start time <p>If an entitlement process applies to a case, this field appears.</p>
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.
Milestone Status Icon	<p>Indicates a milestone’s status on a case by displaying one of the following icons:</p> <ul style="list-style-type: none"> •  Compliant •  Open Violation •  Closed Violation <p>If an entitlement process applies to a case, this field appears.</p> <p> Note: This field displays only in Salesforce Classic.</p>
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

Field	Description
	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, <code>Printing Gives Error on Internet Explorer</code> .
Timeline	<p>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:</p> <ul style="list-style-type: none"> •  Completed milestone •  Violated milestone <p>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.</p>
Type	Type of case, for example, question or problem. Administrators set field values.

Field	Description
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.

SEE ALSO:

[Guidelines for Working with Cases](#)

Case History

The Case History related list on 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 Lightning Platform 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:

[What's a Case?](#)

Case Hierarchies

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.

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view cases:

- Read on cases

USER PERMISSIONS

To view cases:

- Read on cases

To view parent cases:

- Read on cases

A case hierarchy shows cases that are associated with one another via the `Parent Case` field. In the case hierarchy, child 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 specified 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** dropdown button, you can choose to create either a blank case or a case with information from the parent case.

SEE ALSO:

[Guidelines for Working with Cases](#)

[Create Cases](#)

Related Cases

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.

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.

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](#).
- **Close** 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:

[Case Hierarchies](#)

Set Up Rules and Queues

Automation keeps things running smoothly. Set up rules and queues to help you prioritize, distribute, assign, respond to, and escalate records.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view cases:

- Read on cases

To create cases:

- Create on cases

IN THIS SECTION:

[Set Up Queues](#)

Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, leads, orders, custom objects, service contracts, and knowledge article versions.

[Set Up Assignment Rules](#)

Define conditions that determine how leads or cases are processed.

[Set Up Auto-Response Rules](#)

Send automatic email responses to lead or case submissions based on the record's attributes. Set up auto-response rules to send quick replies to customers to let them know someone at your company received their inquiry or details about their issue.

[Set Up Escalation Rules](#)

Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry. You can create rule entries, which define criteria for escalating a case, and escalation actions, which define what happens when a case escalates.

[Limits for Assignment, Auto-Response, and Escalation Rules](#)

Salesforce limits the number of rules, as well as the number of entries and actions per rule. These limits apply to assignment rules, auto-response rules, and escalation rules.

Set Up Queues

Prioritize, distribute, and assign records to teams who share workloads. Access queues from list views. Queue members can jump in to take ownership of any record in a queue. They're available for cases, leads, orders, custom objects, service contracts, and knowledge article versions.

You can manually add a record to a queue by changing the record's owner to the queue. Or, an assignment rule can add cases or leads to a queue based on specific record criteria. Records remain in a queue until they're assigned an owner. Any queue members or users higher in a role hierarchy can take ownership of records in a queue.

**Example:**

- Create a lead queue with members who are salespeople assigned to a specific sales territory.
- Create a case queue with members who are support agents assigned to different service levels.
- Create a knowledge article version queue members who are users that can translate new versions of articles into a specific language.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Service contract queues available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Lead queues and case queues are not available in **Database.com**

Create Queues

Prioritize and assign records to teams that share workloads. There's no limit to the number of queues you can create, and you can choose when queue members receive email notifications.

1. From Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Click **New**.
3. Enter a label and queue name. The label is the name of the list view that users work from.
4. Choose whom to notify when new records are added to the queue.
5. If your org uses divisions, select the queue's default division. Cases inherit the division of the contact they're related to, but when a case doesn't have a contact, it's assigned to the default global division.
6. Add which objects to include in the queue.
7. Add queue members. Members can be individuals, roles, public groups, territories, connections, or partner users.

Depending on your sharing settings, only queue members and users above them in the role hierarchy can take ownership of records in the queue.

8. Save the queue.
9. If you want, set up assignment rules for your lead or case queues so that records that meet certain criteria are automatically added to a queue.

SEE ALSO:

[Set Up Case Teams](#)

[Set Up Assignment Rules](#)

Knowledge Article: How to stop email notification to queue members?

USER PERMISSIONS

To create or change queues:

- Customize Application
- AND
- Manage Public List Views

To change queues created by other users:

- Customize Application
- AND
- Manage Public List Views and Manage Users

Set Up Assignment Rules

Define conditions that determine how leads or cases are processed.

1. From Setup, enter *Assignment Rules* in the **Quick Find** box, then select either **Lead Assignment Rules** or **Case Assignment Rules**.
2. Choose **New**, and then give the rule a name. Specify whether you want this to be the active rule for leads or cases created manually and via the web and email. Then click **Save**.
3. To create the rule entries, click **New**. For each entry, you can specify:

Field	Description
Order	<p>Sets the order in which the entry will be processed in the rule, for example, 1, 2, 3.</p> <p>Salesforce evaluates each entry in order and tries to match the criteria of the entry. As soon as a match is found, Salesforce processes the item and stops evaluating the rule entries for that item. If no match is found, the item is reassigned to either the default Web-to-Lead owner, the administrator doing a lead import, or the default case owner.</p>
Criteria	<p>Specifies conditions that the lead or case must match for it to be assigned. Enter your rule criteria.</p> <ul style="list-style-type: none"> • Choose criteria are met and select the filter criteria that a record must meet to trigger the rule. For example, set a case filter to <i>Priority equals High</i> if you want case records with the <i>Priority</i> field marked High to trigger the rule. <p>If your organization uses multiple languages, enter filter values in your organization's default language. You can add up to 25 filter criteria, of up to 255 characters each.</p> <p>When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the Default Language on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.</p> <ul style="list-style-type: none"> • Choose formula evaluates to true and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." For example, the formula <code>AND (ISCHANGED (Priority), ISPICKVAL (Priority, "High"))</code> triggers a rule that changes the owner of a case when the <i>Priority</i> field is changed to High. <p>If your condition uses a custom field, the rule entry will be deleted automatically if the custom field is deleted.</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create assignment rules:

- **Customize Application**

Field	Description
User	<p>Specifies the user or queue to which the lead or case will be assigned if it matches the condition. Users specified here cannot be marked “inactive” and they must have “Read” permission on leads or cases.</p> <p> Note: You can't revoke the “Read” permission on leads or cases for users assigned to a rule.</p> <p>If your organization uses divisions, leads are assigned to the default division of the user or queue specified in this field. Cases inherit the division of the contact to which they are related, or are assigned to the default global division if no contact is specified.</p>
Do Not Reassign Owner	<p>Specifies that the current owner on a lead or case will not be reassigned to the lead or case when it is updated.</p>
Email Template	<p>Specifies the template to use for the email that is automatically sent to the new owner. If no template is specified, no email will be sent. When assigning a lead or case to a queue, the notification goes to the <code>Queue Email</code> address specified for the queue and all queue members.</p>
Predefined Case Teams	<p>Specifies the predefined case team(s) to add to a case when it matches the condition. A case team is a group of people that work together to solve cases.</p> <p>Click the Lookup icon () to select a predefined case team to add to the assignment rule. To add more predefined case teams, click Add Row to add a new row with which you can add a predefined case team.</p>
Replace any existing predefined case teams on the case	<p>Specifies that any existing predefined case teams on the case are replaced with the predefined case teams on the condition, when a case matches the condition.</p>

After creating the entry, click **Save**, or **Save & New** to save the entry and create more entries.



Tip: Create an error-proof rule by always creating the last rule entry with no criteria. This rule entry catches any leads or cases that the previous rule entries didn't assign.

IN THIS SECTION:

[Viewing and Editing Assignment Rules](#)

[Managing Assignment Rules](#)

Viewing and Editing Assignment Rules

To view and edit assignment rules:

- To edit the name of a rule, click **Rename** next to the rule name.
- To edit the entries for a rule, choose the rule name from the list of rules. Click **New** to add an entry; choose **Edit** or **Del** to edit or delete an entry; select **Reorder** to change the order in which the entries apply.

SEE ALSO:

[Set Up Assignment Rules](#)

[Managing Assignment Rules](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To change assignment rules:

- Customize Application

To view assignment rules:

- View Setup and Configuration

Managing Assignment Rules

Create assignment rules to automate your organization's lead generation and support processes.

- **Lead Assignment Rules**—Specify how leads are assigned to users or queues as they are created manually, captured from the web, or imported via the Data Import Wizard.
- **Case Assignment Rules**—Determine how cases are assigned to users or put into queues as they are created manually, using Web-to-Case, Email-to-Case, On-Demand Email-to-Case, the Self-Service portal, the Customer Portal, Outlook, or Lotus Notes.

Typically, your organization will have one rule for each overall purpose—for example, one lead assignment rule for importing and a different lead assignment rule for web-generated leads; or one case assignment rule for standard use and one case assignment rule for holiday use. For each rule type, only one rule can be in effect at any time.

Each rule consists of multiple rule entries that specify exactly how the leads or cases are assigned. For example, your standard case assignment rule may have two entries: cases with "Type equals Gold" are assigned to "Gold Service" queue, and cases with "Type equals Silver" are assigned to "Silver Service" queue.

To create an assignment rule, from Setup, enter *Assignment Rules* in the **Quick Find** box, then select **Lead Assignment Rules** or **Case Assignment Rules**.

Sample Assignment Rule

The following case assignment rule assigns a case to a specific queue based on the account rating:

Rule Name — *Hot Account Assignment*

Rule Entries:

Order	Criteria	Assign To
1	<i>ISPICKVAL(Account.Rating, "Hot")</i>	<i>Tier 1 Support Queue</i>
2	<i>OR(ISPICKVAL(Account.Rating, "Warm") , ISPICKVAL(Account.Rating, "Cold"))</i>	<i>Tier 2 Support Queue</i>

SEE ALSO:

[Set Up Assignment Rules](#)

[Viewing and Editing Assignment Rules](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Lead Assignment Rules available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Case Assignment Rules available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create or change assignment rules:

- **Customize Application**

Set Up Auto-Response Rules

Send automatic email responses to lead or case submissions based on the record's attributes. Set up auto-response rules to send quick replies to customers to let them know someone at your company received their inquiry or details about their issue.

Create auto-response rules for leads captured through a Web-to-Lead form and for cases submitted through a:

- Self-Service portal
- Customer Portal
- Web-to-Case form
- Email-to-Case message
- On-Demand Email-to-Case message

Create as many response rules as you like based on any attribute of the incoming lead or case. Keep in mind that you can activate only one rule for leads and one for cases at a time. Sales and service reps can find the email responses in the Activity History related list of the lead or contact and in the Email related list on cases.

Creating Auto-Response Rules

To create a Web-to-Lead response rule, from Setup, enter *Auto-Response Rules* in the Quick Find box, then select **Lead Auto-Response Rules**. To create a response rule for cases, from Setup, enter *Auto-Response Rules* in the Quick Find box, then select **Case Auto-Response Rules**. On the Auto-Response Rules page:

1. Click **New**.
2. Enter the rule name.
3. Check the active box to make this rule the only one activated.
4. Click **Save**.
5. Create rule entries.

Creating Response Rule Entries

1. Click **New** from the rule detail page.
2. Enter a number to specify the order this entry should be processed.

The rule processes entries in this order and stops processing at the first matching entry and then sends the email using the specified email template. If no response rules apply, the rule uses the default template you specify on the Web-to-Case or Web-to-Lead Settings page.

 **Note:** To create an error-proof rule, always create the last rule entry with no criteria. This rule entry will catch any leads or cases that the previous rule entries did not. This is especially important for Email-to-Case and On-Demand Email-to-Case which don't have default templates.

3. Enter your rule criteria:
 - Choose *criteria are met* and select the filter criteria that a record must meet to trigger the rule. For example, set a case filter to *Priority equals High* if you want case records with the *Priority* field marked High to trigger the rule.

If your organization uses multiple languages, enter filter values in your organization's default language. You can add up to 25 filter criteria, of up to 255 characters each.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create auto-response rules:

- Customize Application

When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the `Default Language` on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

- Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." For example, the formula `AND (ISPICKVAL (Priority, "High"), Version < 4.0)` triggers a rule that automatically responds with the selected template if the `Priority` field on a case is set to High and the value of a custom field named `Version` on the case is less than four.
4. Enter the name to include on the From line of the auto-response message.
 5. Enter the email address to include on the From line of the auto-response message. This must be either one of your verified organization-wide email addresses or the email address in your Salesforce user profile, and must be different from the routing addresses you use for Email-to-Case.
 6. If you want, enter a reply-to address.
 7. Select an email template.
 8. If you're creating a response rule entry for Email-to-Case, select `Send response to all recipients` to send auto-response messages to anyone included in the `To` and `Cc` fields in the original message.
 9. Save your work.

IN THIS SECTION:

[Differences Between Auto-Response Rules and Workflow Email Alerts](#)

Differences Between Auto-Response Rules and Workflow Email Alerts

Auto-response rules and workflow email alerts provide similar functionality. The following table lists some of the differences between workflow alerts and auto-response rules to help you determine which process to use:

Type of Process	Designed For	Runs When	Sends Email To	Number of Emails Sent
Workflow email alerts	Notifications to interested parties.	A case or lead is created or edited.	Anyone you choose.	<p>Sends one email per email alert. Each workflow rule can have up to:</p> <ul style="list-style-type: none"> • 10 email alerts as immediate actions • 10 email alerts per time trigger as time-dependent actions • 10 time triggers

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Auto-response rules are available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Workflow is available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

Type of Process	Designed For	Runs When	Sends Email To	Number of Emails Sent
Auto-response rules	Initial response to the contact who created a case or the person who submitted the lead on the Web.	A case or lead is created.	Contact on a case or the person who submitted the lead on the Web.	Sends one email based on the first rule entry criteria it matches in a sequence of rule entries.

SEE ALSO:

[Set Up Auto-Response Rules](#)

Set Up Escalation Rules

Escalation rules automatically escalate cases when the case meets the criteria defined in the rule entry. You can create rule entries, which define criteria for escalating a case, and escalation actions, which define what happens when a case escalates.

Before you get started:

- If you want to assign cases to queues, create [queues](#).
- If you want to send notification emails when a case escalates, create [email templates](#).

When Salesforce applies an escalation rule to a case, it inspects the case and compares the case to the criteria in the rule entry. If the case matches the criteria defined in the rule entry, Salesforce runs the escalation actions.

Orgs typically use one escalation rule that consists of multiple rule entries. For example, your standard case escalation rule could have two entries: cases with `Type` set to Gold are escalated within two hours, and cases with `Type` set to Silver are escalated within eight hours.

1. From Setup, enter *Escalation Rules* in the `Quick Find` box, then select **Escalation Rules**.
2. Create the escalation rule.
 - a. Click **New** and name the rule. Specify whether you want this rule to be the active escalation rule. You can have only one active escalation rule at a time.
 - b. Click **Save**.
3. On the Case Escalation Rules page, select the rule that you want to work with. The rule detail page is displayed.
4. Create the rule entries. Rule entries define the criteria used to escalate the case.
 - a. In the Rule Entries section, click **New**. For each rule entry, you can specify:
 - Order in which rule entries are evaluated
 - Criteria for escalating a case
 - How business hours affect when cases escalate
 - How escalation times are determined
 - b. Click **Save**. The Escalation Actions page is displayed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or edit escalation rules:

- Customize Application

5. Define the escalation actions. Escalation actions specify when the case escalates and what happens when the case escalates. You can add up to five actions for each rule entry to escalate the case over increasing periods of time.
 - a. In the Escalation Actions section, click **New**. For each escalation action, you can:
 - Specify when the case escalates: In the `Age Over` field, enter the number of hours after which a case escalates if it hasn't been closed. You can enter the number of hours and either 0 minutes or 30 minutes. For example, 1 hour and 0 minutes or 1 hour and 30 minutes.
 - Reassign the case to another user or queue, and select an email template that sends the new assignee (the new case owner) a notification email.
 - Send notification emails to other users, the current case owner, or other recipients.
 - b. Click **Save**.

IN THIS SECTION:

[Escalation Rule Examples and Best Practices](#)

See examples of how different options in the escalation rule entries and actions affect how and when cases escalate.

[When do rules execute?](#)

Salesforce processes rules in a certain order.

SEE ALSO:

[Monitor the Case Escalation Rule Queue](#)

Escalation Rule Examples and Best Practices

See examples of how different options in the escalation rule entries and actions affect how and when cases escalate.

IN THIS SECTION:

[Escalation Rule Entries](#)

Escalation criteria specify the conditions under which a case escalates. We store your criteria in a rule entry.

[Escalation Actions](#)

Escalation actions specify when the case escalates and what happens when the case escalates.

An escalation rule can reassign the case to another support agent (user) or support queue

(queue). An escalation rule also can send notification emails to the new assignee, to the current case owner, and to other recipients.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Escalation Rule Entries

Escalation criteria specify the conditions under which a case escalates. We store your criteria in a rule entry.

When Salesforce applies an escalation rule to a case, it inspects the case and compares the case to the criteria in the rule entry. If the case matches the criteria defined in the rule entry, Salesforce runs the escalation actions.

Let's break down the parts of an escalation rule entry and go over the best practices for each step:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Rule Entry Edit Help for this Page ?

Support Escalation Rule

Enter the rule entry Save Save & New Cancel

Step 1: Set the order in which this rule entry will be processed ! = Required Information

Sort Order 1

Step 2: Select the criteria for this rule entry

Run this rule if the following 2.1

Field	Operator	Value	
Case: Priority 2.2	equals	High	AND
Account: Account Name	equals	Acme, Global Media	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic... 2.3

Step 3: Specify the business hours criteria for this escalation rule

Ignore business hours
 Use business hours specified on case 3
 Set business hours

Step 4: Specify how escalation times are set 4

Based on when the case is created
 Based on when the case is created, and disable after the case is first modified
 Based on last modification time of the case

Save Save & New Cancel

Step 1: Rule Entry Order

The `Sort Order` determines the sequence in which Salesforce evaluates rule entries [1]. Typically, orgs use one escalation rule that's made up of several rule entries.

Tip: As a best practice, put the most complex rule entries at the beginning of the sort order. Put more generic rule entries at the end of the sort order.

Suppose that you have five rule entries. Salesforce looks at the first rule entry to see if its criteria matches the case. If the criteria matches, then Salesforce stops evaluating and escalates the case. If the criteria doesn't match, then Salesforce looks at the second rule entry to see if it matches, and so on, until it finds a match.

If the first rule entry is generic, then Salesforce finds a match and escalates the case without continuing to evaluate later rule entries.

It's a good practice to put a generic "catch-all" rule entry at the end of the rule entry order. The catch-all rule entry is designed to escalate cases that don't meet the criteria specified in the other rule entries. For example, perhaps you want to escalate cases that have been open for more than 48 hours. Create a rule entry that contains no criteria so that it catches all remaining cases, and specify that cases escalate 48 hours after they were created.

Step 2: Rule Entry Criteria

The rule entry criteria define the case field values that trigger an escalation. When Salesforce evaluates the rule entry, it looks at the criteria and sees if the criteria match the field values set on the case. If the criteria match, the case is escalated.

Run this rule if the criteria are met

You can define escalation criteria using field values by selecting **criteria are met** [2.1].

Select the field, select the operator, and select the value [2.2]. For example, suppose that we want to escalate cases that are high priority and from our two biggest customers, Acme and Global Media. We can create a rule entry that escalates cases where the Priority field equals *High* and the Account: Account Name field equals *Acme* or *Global Media*.

You can specify more field values by filling out the rows.



Tip: By default, the filter concatenates the rows using AND. However, if you want to use a different filter operator, click **Add Filter Logic** [2.3]. You can refine the filter using parentheses, AND, and OR. For example, (1 AND 2) or (3 AND 4).

Run this rule if the criteria are met

You can define escalation criteria using a formula by selecting **formula evaluates to true**.

Enter a formula that returns a value of True or False. Salesforce triggers the rule if the formula returns "True."

Step 3: Business Hours Criteria

Business hours let you specify when your support team is available [3]. If business hours are specified on the escalation rule, then escalation actions occur only during business hours.

Let's look at some examples. Let's say that your support team is based in San Francisco and works from 9 AM-5 PM Monday-Friday, Pacific time.

Ignore business hours

If you don't want to use business hours when calculating when cases are escalated, select **Ignore business hours**. In this situation, a case is escalated without consideration of the support team's business hours or the case's business hours. For example, a case might escalate at 3 AM Pacific time, even though the support team isn't available.

Use business hours specified on the case

A case might have different business hours than your support team. If business hours are specified on the case, then the case escalates during the case's business hours.

Suppose that your support team is located in San Francisco and works 9-5 Pacific time, but your customer is located in New York and operates on Eastern time. You could specify Eastern business hours on the case, so that your support team knows to contact the customer during Eastern business hours. If **Use business hours specified on the case** is selected, then the case escalates during East Coast business hours. So, a case could escalate at 6 AM Pacific, because that's within Eastern business hours (9 AM -5 PM Eastern, which is 6 AM-2 PM Pacific).

Set business hours

Use the lookup to select the business hours that are defined for your company. If you select this option, then cases are escalated during these hours. Perhaps you've defined business hours as 9 AM-5 PM Pacific time. If you select the 9-5 Pacific time business hours, then cases would only be escalated during that time period.

Step 4: How Escalation Times Are Set

Specify when the escalation clock starts ticking by specifying how escalation times are set [4]. Your selection here affects when the time period specified in the `Age Over` field begins to run. You can set the `Age Over` field on the Escalation Actions page.

When case is created

The escalation clock starts ticking when the case is created, and the case escalates when the time period set in the `Age Over` field expires.

If `Age Over` is set to 5 hours, then the case escalates five hours after the case is created. If the case is created at 9 AM on Monday morning, it would escalate at 2 PM on Monday afternoon.

When case is created, and disable after case is first modified

The escalation clock starts ticking when the case is created but stops when the case is modified, provided that the case is modified before the `Age Over` time period expires.

If `Age Over` is set to 5 hours, then the case escalates five hours after the case is created unless the case is modified before five hours elapse. If the case is created at 9 AM on Monday morning and isn't modified within the five-hour period, then the case would escalate at 2 PM on Monday afternoon. However, if the case is created at 9 AM on Monday and a support agent modifies the case at 10 AM, then the case wouldn't escalate.

Based on last modification time

The escalation clock starts ticking when the case is modified.

If `Age Over` is set to 5 hours, then the case escalates five hours after the case is last modified. Suppose that the case is created at 9 AM on Monday morning and an agent modifies the case at 10 AM. The case would escalate at 3 PM on Monday afternoon, which is five hours after the 10 AM modification.

SEE ALSO:

[Set Up Escalation Rules](#)

[Escalation Actions](#)

Escalation Actions

Escalation actions specify when the case escalates and what happens when the case escalates. An escalation rule can reassign the case to another support agent (user) or support queue (queue). An escalation rule also can send notification emails to the new assignee, to the current case owner, and to other recipients.

Let's break down the parts of an escalation action and go over best practices for each step:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Escalation Action Edit

Help for this Page ?

Save Cancel

Escalation Action Edit

= Required Information

Specify the time criteria for this rule

Age Over 0 minutes

Choose one or more of the following actions:

Auto-reassign cases to

Queue Notification Template

Select the user to notify

Notify This User Notification Template

Notify Case Owner

You can enter up to five (5) email addresses to be notified. Please put each address on its own line.

Additional Emails

Save Cancel

Age Over

Salesforce escalates the case if the case hasn't been closed within this time period [1]. For example, escalate the case if it hasn't been closed within five hours.

This time is calculated from the date field set in the `Specify how escalation times are set` field in the rule entry. No two escalation actions can have the same number in this field.

The `Age Over` field is required, because escalation rules are time-based.

Auto-Reassign Cases

When a case escalates, Salesforce can reassign the case to a different user or queue [2].

- `Queue` or `User`—Select a user or queue to reassign the case to. When a case is reassigned, the queue or user becomes the new case owner. Companies typically reassign cases to a queue instead of a specific user. For example, if Level 1 support doesn't resolve a case within 24 hours, the case is reassigned to the Level 2 support queue.
- `Notification Template`—Select a notification template to use to send a notification email to the assignee.

If you select a `Notification Template`, then Salesforce sends a notification email to the new case owner. The template controls which fields are included in the notification email. For example, the email template might include the case number, case contact, account name, and case reason so that the new case owner can quickly understand the situation.

Notify Users

When a case escalates, Salesforce can send a notification email so that a user, the current case owner, or other email recipients know that the case is escalating [3].

- `Notify This User`—Select a user to notify. For example, you might want to notify the support manager.

- **Notify Case Owner**—Send an email to the current case owner to remind them that the case is escalating. Select this checkbox when you want to notify the case owner but haven't reassigned the case.
- **Additional Emails**—You can send notification emails to other people when a case is escalated. Enter up to five email addresses, each on a separate line. For example, you can set up an escalation rule to notify support managers or executives so that they know that a case is escalating.
- **Notification Template**—If you select **Notify This User**, **Notify Case Owner**, or **Additional Emails**, then you must select a notification template to send a notification email to the user, case owner, or additional recipients. The template controls which fields are included in the notification email.

SEE ALSO:

- [Set Up Escalation Rules](#)
- [Escalation Rule Entries](#)

When do rules execute?

Salesforce processes rules in a certain order.

1. Validation rules
2. Assignment rules
3. Auto-response rules
4. Workflow rules (with immediate actions)
5. Escalation rules

SEE ALSO:

- [Set Up Escalation Rules](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Limits for Assignment, Auto-Response, and Escalation Rules

Salesforce limits the number of rules, as well as the number of entries and actions per rule. These limits apply to assignment rules, auto-response rules, and escalation rules.

Limit	Value
Rules per org (Applies to any combination of workflow, assignment, auto-response, and escalation rules, <i>active</i> and <i>inactive</i> .)	2,000
Active rules per object (Applies to any combination of <i>active</i> workflow, assignment, auto-response, and escalation rules, as well as processes.)	50
Rules per object (Applies to any combination of workflow, assignment, auto-response, and escalation rules, <i>active</i> and <i>inactive</i> .)	500
Entries per rule	3,000

Limit	Value
Formula criteria entries per rule	300
Filter criteria per rule entry	25
Actions allowed per rule	200

SEE ALSO:

[Set Up Assignment Rules](#)

[Set Up Auto-Response Rules](#)

[Set Up Escalation Rules](#)

Set Up and Manage Entitlements and Milestones

Give your customers the level of support you've promised them. Entitlement management lets you define, enforce, and track customer service levels as part of your support management process.

IN THIS SECTION:

[Entitlement Management Help](#)

Find the information you need to make the most of entitlement management.

[What's Entitlement Management?](#)

Entitlement management helps you provide the correct support to your customers. Its variety of features let you define, enforce, and track service levels as part of your support management process.

[Planning for Entitlement Management](#)

Entitlement management is highly customizable, which means you have many choices during setup. Before you begin the setup process, it's essential to choose an entitlement management model.

[Entitlement Management Setup Checklist](#)

When you set up entitlement management, you decide which features to use. Use this checklist to confirm that you've set up entitlement management in a way that fits your support processes.

[Entitlement Management Limits and Limitations](#)

The following limits and limitations apply to entitlements and their related features.

[Entitlements](#)

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.

[Milestones](#)

Milestones represent required, time-dependent steps in your support process, like first response or case resolution times. Milestones are added to entitlement processes to ensure that agents resolve support records correctly and on time.

[Entitlement Processes](#)

Entitlement processes are timelines that include all the steps (or milestones) that your support team must complete to resolve support records like cases or work orders. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

[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.

[Set Up Entitlement Management in Communities](#)

Add entitlement management to your communities to let customers or partners view their entitlements and service contracts. Contract line items don't display in communities.

Entitlement Management Help

Find the information you need to make the most of entitlement management.

Entitlement Management

- **Trailhead:** [Entitlement Management](#)
- [What's Entitlement Management?](#)
- [Planning for Entitlement Management](#)
- [Entitlement Management Setup Checklist](#)
- [Entitlement Management Limits and Limitations](#)
- [How Business Hours Work in Entitlement Management](#)
- [The Admin's Guide to Entitlement Management](#)

Entitlements

- [Entitlements](#)
- [Guidelines for Working with Entitlements](#)
- [Verify Entitlements](#)
- [Entitlements: Terms to Know](#)
- [Entitlement Fields](#)
- [Set Up Entitlements](#)
- [Set Up Entitlement Management in Communities](#)
- [Report on Entitlements](#)

Milestones and Entitlement Processes

- [Work with Milestones](#)
- [Milestone Statuses](#)
- [Milestone Actions](#)
- [Milestone Recurrence Types](#)
- [Milestones: Supported Objects](#)
- [Where Can I View Milestones?](#)
- [Set Up Milestones](#)
- [Work with Entitlement Processes](#)
- [How a Record Moves Through an Entitlement Process](#)
- [Set Up Entitlement Processes](#)

Updating Entitlement Processes

- [Updating an Entitlement Process](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

- [Create a New Version of an Entitlement Process](#)
- [Use a New Version of an Entitlement Process](#)

Service Contracts

- [Service Contracts](#)
- [Guidelines for Working with Service Contracts](#)
- [Service Contract Fields](#)
- [Set Up Service Contracts](#)

Contract Line Items

- [Contract Line Items](#)
- [Guidelines for Working with Contract Line Items](#)
- [Contract Line Item Fields](#)
- [Add Contract Line Items to Service Contracts](#)

What's Entitlement Management?

Entitlement management helps you provide the correct support to your customers. Its variety of features let you define, enforce, and track service levels as part of your support management process.

Entitlement management features include:

- *Entitlements*, which let support agents determine whether a customer is eligible for support.
- *Entitlement processes*, which let you design timelines that include all the steps that your support team must complete to resolve support records like cases or work orders.
- *Service contracts*, which let you represent different kinds of customer support agreements like warranties, subscriptions, or maintenance agreements. You can restrict service contracts to cover specific products.
- *Community access to entitlements*, which lets community users view entitlements and service contracts and create support records from them.
- *Reporting on entitlement management*, which lets you track the way entitlements are used in your Salesforce org and whether service contract terms are being met.

Because entitlement management is highly customizable, you have full control of which features you use and how you set them up to reflect your customer support model. We'll walk you through important planning decisions and setup steps to help you make the most of entitlement management. To get started, we recommend that you check out the Entitlement Management Trailhead module:

[Entitlement Management](#).

 **Important:** Only users in orgs with the Service Cloud can enable, create, and update entitlement management items.

SEE ALSO:

[Planning for Entitlement Management](#)

[Entitlement Management Setup Checklist](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Planning for Entitlement Management

Entitlement management is highly customizable, which means you have many choices during setup. Before you begin the setup process, it's essential to choose an entitlement management model.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Choose What Determines Support Eligibility

You can set up entitlement management so customers are eligible for support based on one or several of the following types of records:

- *Accounts*: Any contact on the account is eligible for support.
- *Contacts*: Specific contacts are eligible for support.
- *Assets*: Specific assets (purchased products) are eligible for support.
- *Service contracts*: Customers are eligible for support based on a specific service contract.
- *Contract line items*: Specific products covered by a service contract are eligible for support.

Your approach depends on how detailed you want your support process to be. If you prefer to keep it simple, just have your support agents determine support eligibility based on accounts. Here's what this approach looks like:



Choose a Setup Model

There are three general ways to set up entitlement management. Once you've decided what should determine support eligibility, review the three models and select the one that best meets your business needs. You can always change which model you're using.

Entitlement model	What determines support eligibility	Use this model if
Entitlements only (simplest option)	Support agents determine whether a customer is eligible for support at the account, contact, or asset level.	<ul style="list-style-type: none"> • There's no need to manage your customers' entitlements as part of a service contract

Entitlement model	What determines support eligibility	Use this model if
		<ul style="list-style-type: none"> Your entitlements don't have a renewal process Entitlements aren't purchased by your customers; they're bundled with products (warranties) Your customers' entitlements are short term and managed independently of each other
Entitlements + service contracts	Support agents determine whether a customer is eligible for support based on their service contract.	<ul style="list-style-type: none"> Entitlements are purchased and managed separately from the products they cover and are part of a service contract Your customers' entitlements are renewed at a contract level You use Salesforce for customer support but not necessarily for service contract management
Entitlements + service contracts + contract line items (most complex option)	Support agents determine whether a customer is eligible for support based on the products covered in their service contract.	<ul style="list-style-type: none"> You use Salesforce for customer support and to manage your customers' service contracts Your support team manages service contract transactions, such as transfers, mergers, and renewals Warranties, subscriptions, or other support products appear as line items on your sales orders and map to one or more entitlements Entitlements are created and updated through an integration with your order management system

Regardless of the setup model you choose, you can enhance your support process with other entitlement management features. For example, you can:

- Create entitlement processes to enforce required, time-dependent steps in your support process
- Use entitlement versioning to create and maintain multiple versions of entitlement processes
- Add entitlements to communities
- Report on entitlements

After you select a setup model, head to the invaluable [Entitlement Management Setup Checklist](#).

SEE ALSO:

[What's Entitlement Management?](#)

Entitlement Management Setup Checklist

When you set up entitlement management, you decide which features to use. Use this checklist to confirm that you've set up entitlement management in a way that fits your support processes.

Step	Complete if...
<input type="checkbox"/> Read Planning for Entitlement Management	You're thinking about using entitlements in your org.
<input type="checkbox"/> Set Up Entitlements	You want customer support eligibility to be determined at the account or contact level.
<input type="checkbox"/> Enable Entitlements	You want to use entitlements in your org.
<input type="checkbox"/> Customize Entitlements	You want to control which fields users see on entitlements, and how and where users associate entitlements with other records.
<input type="checkbox"/> Set Up Entitlement and Asset Lookup Filters on Cases	You want to control which entitlements and assets users can link to a case.
<input type="checkbox"/> Give Users Access to Entitlement Management	You want to give users the appropriate user permissions, field access, and tab access.
<input type="checkbox"/> Set Up an Entitlement Template	You want to predefine the terms of support for specific products.
<input type="checkbox"/> Automatically Add Entitlements to Cases from Web, Email, and Communities	You want the correct entitlement to be added automatically to cases created using Web-to-Case, Email-to-Case, or communities.
<input type="checkbox"/> Set Up Milestones	You want to define required steps that support agents must complete to close a support record.
<input type="checkbox"/> Customize Milestone Page Layouts	You want to control which milestone-related fields users see.
<input type="checkbox"/> Enable Milestone Feed Items	You want automatic notifications to be added to the feed and the record owner's profile page when a milestone is completed or violated.
<input type="checkbox"/> Set Up the Milestone Tracker	You want your support team to be able to see a list of upcoming and completed milestones and countdowns for active and overdue milestones.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up entitlement management

- [Manage Entitlements](#)

Step	Complete if...
<input type="checkbox"/> Limit User Updates to Milestones	You want to prevent users from updating milestones unless certain criteria are met.
<input type="checkbox"/> Create a Milestone	You want to define a required step in your support process.
<input type="checkbox"/> Auto-Complete Case Milestones	You want milestones to be automatically marked Completed on cases that match unique criteria.
<input type="checkbox"/> Set Up Entitlement Processes	You want to be able to apply the required steps in your support process to specific records.
<input type="checkbox"/> Create an Entitlement Process	You want to create a timeline that includes all of the steps that your support team must complete to resolve support records.
<input type="checkbox"/> Customize Entitlement Process Fields	You want to control which entitlement process fields users see.
<input type="checkbox"/> Add a Milestone to an Entitlement Process	You want to specify which required support steps occur, and when, on your timeline.
<input type="checkbox"/> Add a Milestone Action to an Entitlement Process	You want to define time-dependent workflow actions that occur at every step (milestone) in an entitlement process when the milestone is nearing violation, violated, or completed.
<input type="checkbox"/> Apply an Entitlement Process to an Entitlement	You want a specific entitlement's support records to follow the steps defined in your entitlement process.
<input type="checkbox"/> Create a New Version of an Entitlement Process	You want to update an entitlement process.
<input type="checkbox"/> Use a New Version of an Entitlement Process	You want to apply a new version of an entitlement process to new or existing entitlements.
<input type="checkbox"/> Set Up Service Contracts	You want customer support eligibility to be determined at the service contract level.
<input type="checkbox"/> Add Contract Line Items to Service Contracts	You want to be able to limit a service contract to cover specific products.
<input type="checkbox"/> Set Up Entitlement Management in Communities	You want customers or partners to be able to view their entitlements and service contracts and create support records from them.
<input type="checkbox"/> Report on Entitlements	You want to view and share data on entitlements and service contracts.
<input type="checkbox"/> Give your support team entitlement management guidelines.	You want your support team to understand: <ul style="list-style-type: none"> • How to verify that a customer is entitled to support • How to link cases or work orders to entitlements

Step	Complete if...
	<ul style="list-style-type: none"> How entitlement processes affect the way they resolve cases or work orders

SEE ALSO:

[Planning for Entitlement Management](#)

Entitlement Management Limits and Limitations

The following limits and limitations apply to entitlements and their related features.

Limits

Limit	Details
Maximum number of entitlement processes per org	1,000
Maximum number of milestones per entitlement process	10
Maximum number of service contracts in a service contract hierarchy	10,000
Maximum number of contract line items in a contract line item hierarchy	10,000

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Limitations

Entitlement Limitations

- Every entitlement must be associated with an account.
- You can't share entitlements. Entitlements inherit their parent account's sharing settings. To update an entitlement, you need Read access on the parent account.
- If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.
- Merge fields for entitlements on cases aren't supported. For example, if you add the `Entitlement Name {!Case.Entitlement}` merge field to an email template, the field is not populated on the template.
- Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.
- Entitlements don't automatically apply to cases created with Web-to-Case or Email-to-Case. For details on how to auto-add entitlements to these types of cases, see [Automatically Add Entitlements to Cases from Web, Email, and Communities](#).

Milestone Limitations

- You can't add milestones to support records without using entitlement processes. Entitlement processes apply milestones to support records.

- Milestones aren't marked completed automatically. For details on how to auto-complete milestones on records that match unique criteria, see [Auto-Complete Case Milestones](#).
- Actions on time-based milestones may execute a few seconds before their target date. For example, if you set up a violation action to occur 0 minutes after the milestone is violated, the action may execute in the minute before the target date.
- After an entitlement process is activated, you can't delete its milestones or create milestone actions. However, you can create versions of entitlement processes with different milestone settings and apply the new version to existing entitlements.
- By default, the tracker displays only one milestone countdown at a time. To view upcoming milestones, use the links in the tracker.
- Business hours on entitlement processes aren't supported in change sets. To transfer an entitlement process with business hours from one Salesforce org to another, use one of these approaches:
 - Create the entitlement process from scratch in the new org
 - Use an alternative method to transfer the entitlement process, such as the Ant Migration Tool
 - Remove the business hours from the entitlement process before adding it to a change set

Service Contract Limitations

- You can only use contract line items if your org uses the Product object.
- You can't create list views for contract line items.
- You can't share contract line items. Contract line items inherit their parent service contract's sharing settings. For example, users with the "Read" permission on service contracts inherit the "Read" permission on contract line items.
- In the Salesforce app, contract line items can be edited and deleted, but not created.
- You can't select a record type when creating contract line items. To change a line item's record type from the default type, manually update the record after it's created.

 **Note:** If you experience issues with the Root Service Contract field being blank, please contact Salesforce for help.

Lightning Experience Limitations

- The Entitlements related list isn't available on contacts.
- The Entitlement Templates related list isn't available on products.
- The Contacts related list isn't available on entitlements.
- The Case Milestones related list isn't available on cases.
- The Milestone Status Icon field on cases isn't available.
- In the Object Milestones related list on work orders, only the following fields are supported: Created By, Created Date, Last Modified By, Last Modified Date, Deleted, Object Milestone ID, Object Milestone Name, Stopped Time (Mins), Elapsed Time (Mins), Target Date, Completion Date, and Parent Object.
- The Status Icon field on service contracts isn't available.
- When you are adding multiple contract line items to a service contract, picklist fields on contract line items show all values in your org rather than only the values corresponding to the line item's record type. However, selecting a value corresponding to a different record type results in an error. This issue doesn't occur when you are editing a single line item.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

[Set Up Entitlement Processes](#)

Entitlements

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.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Determining Whether a Customer is Entitled to Support



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 Salesforce—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.

IN THIS SECTION:

[Set Up Entitlements](#)

Entitlements are units of customer support in Salesforce, such as “phone support” or “web support”. Set up entitlements in your Salesforce org to help support agents determine whether a customer is eligible for support.

[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.

SEE ALSO:

[Guidelines for Working with Entitlements](#)

[Entitlements: Terms to Know](#)

Set Up Entitlements

Entitlements are units of customer support in Salesforce, such as “phone support” or “web support”. Set up entitlements in your Salesforce org to help support agents determine whether a customer is eligible for support.

IN THIS SECTION:

1. [Enable Entitlements](#)
Enable entitlements in your Salesforce org to help support agents deliver the correct service level to your customers.
2. [Customize Entitlements](#)
Customize entitlement fields and page layouts based on your business needs and how your agents work.
3. [Set Up Entitlement and Asset Lookup Filters on Cases](#)
Set up lookup filters on entitlement-related case fields to restrict the entitlements that users can select on a case.
4. [Give Users Access to Entitlement Management](#)
After you set up entitlement management, make sure that users have the appropriate user permissions, field access, and tab access.
5. [Set Up an Entitlement Template](#)
Entitlement templates let you predefine terms of support that users can add to products.
6. [Automatically Add Entitlements to Cases from Web, Email, and Communities](#)
Entitlements don't automatically apply to cases created using Web-to-Case, Email-to-Case, or communities. However, you can add entitlements to these features using Apex code.
7. [Report on Entitlements](#)
Use custom report types to define report criteria that users can use to run and create reports on entitlements, service contracts, and contract line items.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Enable Entitlements

Enable entitlements in your Salesforce org to help support agents deliver the correct service level to your customers.

 **Note:** Only users with a standard System Administrator profile can enable entitlements.

1. From Setup, enter *Entitlement Settings* in the **Quick Find** box, then select **Entitlement Settings**.
2. Select **Enable Entitlement Management**.
3. Click **Save**. This takes you to a page where you can customize entitlement management settings. You'll come back to those settings later on in the entitlement management setup process.

Customize Entitlements

Customize entitlement fields and page layouts based on your business needs and how your agents work.

1. Customize entitlements fields.

This lets you control what information users add to entitlements.

 **Tip:** Create custom entitlement fields that are specific to your industry or your support processes. For example:

- Customize the values for the **Type** field to match the types of entitlements your team provides or sells, like online support or online training.
- If your business charges for entitlement renewals, create a currency field on entitlements named **Cost to Renew**.

2. Customize entitlement page layouts.

This lets you specify which fields and related lists users see on entitlements. Consider making the following customizations:

- Add the **Status Icon** field so users can easily see whether the entitlement is active, expired, or inactive.
- Add the **Cases, Contacts, and Work Orders** related lists so users can:
 - View cases, contacts, and work orders associated with entitlements
 - Create cases or work orders automatically associated with the correct entitlements
 - Add contacts to entitlements

 **Note:** In Lightning Experience, the Entitlement Templates related list isn't available on product page layouts.

3. Set field history tracking on entitlements.

This lets you see when field values were changed. Changes are listed in the Entitlement History related list on entitlements. From the object management settings for entitlements, go to the fields section and click **Set History Tracking**.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable entitlements:

- "Customize Application"

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

4. Customize other objects' page layouts.

- Add the `Entitlement Name` lookup field to case and work order page layouts. This lets users add entitlements to cases or work orders.
-  **Important:** To let a user create cases from entitlements or change a case's assigned entitlement, make the `Entitlement Name` field on cases editable for their profile.
- Add the Entitlements related list to other objects' page layouts:

Add the Entitlements related list to this object's page layouts...	So users can view and create entitlements when...
Accounts	Any contact on the account is eligible for support
Contacts	Specific contacts are eligible for support
Assets	Specific assets (purchased products) are eligible for support

 **Note:** In Lightning Experience, the Entitlements related list isn't available on Contacts.

5. Make the Entitlements tab visible in Salesforce and any custom apps.

The Entitlements tab is where users create and edit entitlements. Add the tab to an app or instruct your users to add it to an existing tab set in Salesforce. Users need the "Read" permission on entitlements to see the Entitlements tab.

Set Up Entitlement and Asset Lookup Filters on Cases

Set up lookup filters on entitlement-related case fields to restrict the entitlements that users can select on a case.

For example, when community users create a case and use the lookup on the `Entitlement Name` field, you can set up lookup filters so they can choose only entitlements registered to their account or contact.

1. From Setup, enter `Entitlement Settings` in the `Quick Find` box, then select **Entitlement Settings**.
2. Choose the item(s) you'd like returned in the lookup fields.

Lookup Field on Cases	Click...	To Return...
<code>Asset</code>	Same account on the case	Assets registered to the account on the case.
	Same contact on the case	Assets registered to the contact on the case.

 **Tip:** If you want the lookup field to return all assets that share an account with the case, select only this option.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up entitlement-related lookups on cases:

- **Manage Entitlements**

Lookup Field on Cases	Click...	To Return...
	Entitlements on the case's account	Assets associated with entitlements that belong to the case's account.
	Entitlements on the case's contact	Assets associated with entitlements related to the case's contact.  Note: In Lightning Experience, the Entitlements related list isn't available on Contacts.
Entitlement	Active status	Entitlements with an Active Status.
	Same account on the case	Entitlements associated with the account on the case.
	Same asset on the case	Entitlements associated with the asset on the case.
	Same contact on the case	Entitlements associated with the contact on the case.

Choosing multiple items acts as an AND function, so the more items you select, the more it restricts the options returned. For example, choosing Same account on the case and Same contact on the case means the Asset lookup field only returns assets registered to both the account and the contact on the case.

 **Tip:** Choose items that match the way your support agents verify support eligibility. For example, choose the account-related items if your support agents verify support eligibility based on accounts.

3. Click **Save**.

 **Note:** Equivalent lookup filters aren't available for work orders.

Give Users Access to Entitlement Management

After you set up entitlement management, make sure that users have the appropriate user permissions, field access, and tab access.

1. Assign entitlement management permissions to users.

Users Who Will	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Set up entitlement management, including milestones, entitlement processes, and entitlement templates	"Manage Entitlements"	System Administrator
Provide entitlement management to a community	"Customize Application" AND "Create and Set Up Communities"	System Administrator
Create or update custom report types that include entitlement management	"Manage Custom Report Types"	System Administrator
Create and run reports based on entitlement management custom report types	"Create and Customize Reports"	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create cases with entitlements	"Create" on cases AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change a case's entitlement	"Edit" on cases AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create work orders with entitlements	"Create" on work orders AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change a work order's entitlement	"Edit" on work orders AND "Read" on entitlements	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Verify or view entitlements	"Read" on entitlements	Read Only, Standard User, Solution Manager, Contract

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit users:

- Manage Internal Users

Users Who Will	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
		Manager, Marketing User, and System Administrator
Create entitlements	"Create" on entitlements	None: enable the permission in a permission set or custom profile
Change entitlements	"Edit" on entitlements	None: enable the permission in a permission set or custom profile
View entitlement contacts	"Read" on entitlement contacts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Change entitlement contacts	"Create" on entitlement contacts AND "Delete" on entitlement contacts	None: enable the permissions in a permission set or custom profile
Verify or view service contracts	"Read" on service contracts	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create service contracts	"Create" on service contracts	None: enable the permission in a permission set or custom profile
Change service contracts	"Edit" on service contracts	None: enable the permission in a permission set or custom profile
Verify or view contract line items	"Read" on contract line items	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Add contract line items to service contracts	"Edit" on service contracts AND "Create" on contract line items and "Read" on products and price books	None: enable the permissions in a permission set or custom profile
Change contract line items on service contracts	"Edit" on service contracts AND "Edit" on contract line items and "Read" on products and price books	None: enable the permissions in a permission set or custom profile



Tip: If a standard profile doesn't include a certain user permission, you can create a permission set and enable the permission in it. Or, clone the standard profile and enable the permission in the custom profile.

2. Set field-level security.

Choose which entitlement management fields users can view and edit. Field-level security settings let you specify users' access to fields in several areas of the user interface:

- Detail and edit pages
- Related lists
- List views
- Reports
- Search results
- Email and mail merge templates
- Communities

You can set field-level security from a permission set, profile, or a particular field.

 **Important:** To let a user create cases from entitlements or change a case's assigned entitlement, make the `Entitlement Name` field on cases editable for their profile.

Set Up an Entitlement Template

Entitlement templates let you predefine terms of support that users can add to products.

You can create entitlement templates for specific products so support agents can quickly add the right entitlement whenever a customer purchases the product. For example, you can create entitlement templates for web or phone support so agents can easily add entitlements to products offered to customers.

 **Note:** In Lightning Experience, the contact related list isn't available on Entitlements.

Purchased or installed products are represented in Salesforce as assets. That means:

- A *product* (for example, "Laser Scanner") is linked to an entitlement template
- A corresponding *asset* (for example, the laser scanner purchased by ABC Labs) is linked to an entitlement that was created from the entitlement template

 **Note:** Entitlement templates are only available if entitlements and products are enabled in your org.

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating an entitlement template. And, it's fun! To get started, see [Entitlement Management](#).

1. Add the Entitlement Templates related list to product page layouts.
2. Optionally, add the `Type` and `Business Hours` fields to the Entitlement Templates related list. This lets users view the type of entitlement, such as Web or phone support, and any business hours that apply to the entitlement.
3. Create an entitlement template.
 - a. From Setup, enter `Templates` in the Quick Find box, then select **Entitlement Templates**.
 - b. Click **New Template**.
 - c. Enter any details:

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create entitlement templates:

- **Manage Entitlements**

Field	Description
Entitlement Template Name	The name of the entitlement template. Use a descriptive name, like <i>Phone Support</i> . This helps users better understand entitlement templates when they see them on related lists for products.
Term (Days)	The number of days the entitlement is in effect. For example, if you want the entitlement template to entitle all customers who purchase this product to 90 days of phone support, enter <i>90</i> .
Entitlement Process	The entitlement process associated with the entitlement.
Per Incident	Lets you limit the number of cases the entitlement supports. The admin determines whether this field is visible.
Cases Per Entitlement	The total number of cases the entitlement supports. This field is only available if <i>Per Incident</i> is selected.
Business Hours	The entitlement's supported business hours.
Type	The type of entitlement, such as Web or phone support. Admins can customize this field's values.

4. Click **Save**.
5. Add the entitlement template to a product.
 - a. Go to the product detail page.
 - b. Click **Add Entitlement Template** on the Entitlement Templates related list.
 - c. Select the entitlement template.
 - d. Click **Insert Selected**.
 - e. Click **Done**.

Now when a user creates an asset and links it to that product, the Entitlements related list on the asset includes an entitlement created from the entitlement template. That way, support agents responding to a call about the asset can quickly see what kind of support the customer is entitled to receive.



Note: All users, even those without the "View Setup and Configuration" user permission, can view entitlement templates via the API.

Automatically Add Entitlements to Cases from Web, Email, and Communities

Entitlements don't automatically apply to cases created using Web-to-Case, Email-to-Case, or communities. However, you can add entitlements to these features using Apex code.

When a case is created via Web-to-Case, Email-to-Case, or a community, it isn't automatically associated with an entitlement. When a case's `Entitlement` field is empty, this sample trigger checks whether the case contact has an active entitlement. If the contact has an active entitlement, the entitlement is added to the case. If the contact doesn't have an active entitlement, the trigger then checks whether the case account has an active entitlement. If the case account has an active entitlement, the entitlement is added to the case. The trigger helps ensure that cases are resolved according to your customer support agreements.

To define this case trigger in your Salesforce org:

1. From Setup, enter *Case Triggers* in the Quick Find box, then select **Case Triggers**.
2. Click **New**.
3. Copy the text below and paste it in the text field.
4. Click **Save**.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define Apex triggers:

- Author Apex

```
trigger DefaultEntitlement on Case (Before Insert, Before Update) {
    List <EntitlementContact> entlContacts =
        [Select e.EntitlementId,e.ContactId,e.Entitlement.AssetId
        From EntitlementContact e
        Where e.ContactId in :contactIds
        And e.Entitlement.EndDate >= Today
        And e.Entitlement.StartDate <= Today];
    if(entlContacts.isEmpty()==false){
        for(Case c : Trigger.new){
            if(c.EntitlementId == null && c.ContactId != null){
                for(EntitlementContact ec:entlContacts){
                    if(ec.ContactId==c.ContactId){
                        c.EntitlementId = ec.EntitlementId;
                        if(c.AssetId==null && ec.Entitlement.AssetId!=null)
                            c.AssetId=ec.Entitlement.AssetId;
                        break;
                    }
                }
            }
        }
    } else{
        List <Entitlement> entls = [Select e.StartDate, e.Id, e.EndDate,
        e.AccountId, e.AssetId
        From Entitlement e
        Where e.AccountId in :acctIds And e.EndDate >= Today
        And e.StartDate <= Today];
        if(entls.isEmpty()==false){
            for(Case c : Trigger.new){
                if(c.EntitlementId == null && c.AccountId != null){
                    for(Entitlement e:entls){
                        if(e.AccountId==c.AccountId){
                            c.EntitlementId = e.Id;
                            if(c.AssetId==null && e.AssetId!=null)
                                c.AssetId=e.AssetId;
                        }
                    }
                }
            }
        }
    }
}
```


 **Tip:** If you want to view a list of work orders with milestones in your org, use the Object Milestones custom report type to create a work order report.

SEE ALSO:

[Set Up Entitlements](#)

[Set Up Service Contracts](#)

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:

[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.

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:** Depending on how your Salesforce admin set up entitlements, your console app might include the Entitlements tab. In the console, you can 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. To update an entitlement, you need Read access on the parent account.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view entitlements:

- Read on entitlements

To edit entitlements:

- Edit on entitlements

AND

Read on the parent account

To create or clone entitlements:

- Create on entitlements

To delete entitlements:

- Delete on entitlements

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](#)

[Entitlements: Terms to Know](#)

[Entitlement Fields](#)

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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 1. View the contact. 2. Confirm that the entitlement is on the Entitlements related list. <p> Note: In Lightning Experience, the Entitlements related list isn't available on Contacts.</p>
Whether specific assets (purchased products) are entitled to support	Asset detail page	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 1. Click the Service Contracts tab. 2. Click the service contract name. 3. Confirm that the entitlement in question is

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view entitlements:

- Read on entitlements

To view accounts, contacts, assets, and service contracts:

- Read on that object

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.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

- *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](#)

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 <code>Per Incident</code> 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 <code>End Date</code> to 365 days after the <code>Start Date</code> .
Entitlement Name	The entitlement's name. We recommend using a descriptive name, such as <i>Phone Support</i> . This helps users better

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Field	Description
	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 <code>Filter by</code> 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 <code>Start Date</code> to the date when the <code>Status</code> changes to <code>Active</code> .
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 <code>Per Incident</code> is selected.
Status	The entitlement's status. Status is determined by your Salesforce org's current system date and the entitlement's <code>Start Date</code> and <code>End Date</code> . The status is: <ul style="list-style-type: none"> • Active if the system date is equal to or later than the <code>Start Date</code> and equal to or earlier than the <code>End Date</code>. • Expired if the system date is later than the <code>End Date</code>. • Inactive if the system date is earlier than the <code>Start Date</code>.
Status Icon	Represents the entitlement's status with one of the following icons: <ul style="list-style-type: none"> •  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](#)

Milestones

Milestones represent required, time-dependent steps in your support process, like first response or case resolution times. Milestones are added to entitlement processes to ensure that agents resolve support records correctly and on time.

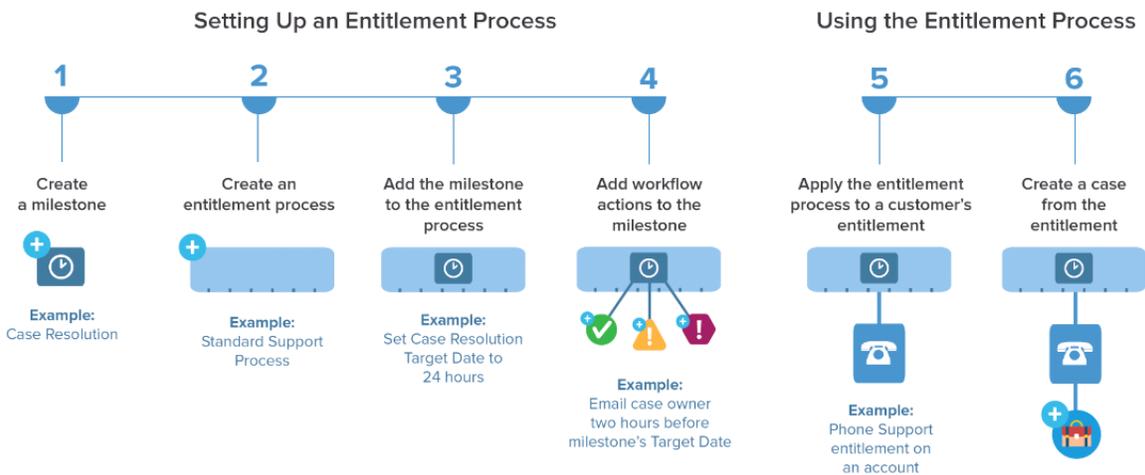
An entitlement process can have up to 10 milestones. You can set up a milestone to occur once in an entitlement process, or to recur until the entitlement process exits.

Here's how milestones fit into your support process:

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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



Before using milestones in your support process, review [Milestone Limitations](#).

Tip: The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating milestones. And it's fun! To get started, see [Entitlement Management](#).

IN THIS SECTION:

[Set Up Milestones](#)

Milestones represent required steps in your support management process, like first response times. Set up and customize milestones in your org so they can be added to entitlement processes and applied to support records like cases and work orders.

[Work with Milestones](#)

Milestones help you give your customers a consistent support experience. Learn about milestones statuses, actions, and recurrence types.

Set Up Milestones

Milestones represent required steps in your support management process, like first response times. Set up and customize milestones in your org so they can be added to entitlement processes and applied to support records like cases and work orders.

Before setting up milestones, make sure that you understand where milestones can appear. See [Where Can I View Milestones?](#)

IN THIS SECTION:

1. [Customize Milestone Page Layouts](#)

Customize your page layouts for milestones to help support agents and supervisors track support progress.

2. [Enable Milestone Feed Items](#)

Help support agents monitor support activity by enabling milestone feed items. This option posts a notification to the feed and the record owner's profile page when a milestone is completed or violated.

3. [Set Up the Milestone Tracker](#)

The milestone tracker gives support agents a complete view of upcoming and completed milestones, and displays countdowns for active and overdue milestones. Add it to the case feed, work order feed, a custom page, or the Service Console.

4. [Limit User Updates to Milestones](#)

Add validation rules to milestones to prevent users from updating milestones unless certain criteria are met.

5. [Create a Milestone](#)

Milestones represent required steps in your support process, such as case resolution time and first response time. You create master milestones in your org and then add them to entitlement processes to enforce different service levels on support records, like cases and work orders.

6. [Auto-Complete Case Milestones](#)

Create an Apex trigger that automatically marks milestones Completed on cases that match unique criteria. In your trigger, define which events and related case criteria must be satisfied for a milestone to be marked Completed. You can implement a similar trigger to auto-complete work order milestones.

SEE ALSO:

[Work with Milestones](#)

[Entitlement Management Setup Checklist](#)

[Milestones: Supported Objects](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Customize Milestone Page Layouts

Customize your page layouts for milestones to help support agents and supervisors track support progress.

1. Add any of the following fields to case and object milestone detail pages.

Use Setup in Salesforce Classic:

- To edit case milestone detail page layouts, from Setup, enter *Case Milestones* in the Quick Find box, then click **Page Layouts** under Case Milestones.
- To edit object milestone detail page layouts (which apply to work order milestones), from Setup, enter *Object Milestones* in the Quick Find box, then click **Page Layouts** under Object Milestones.

Field	Description
Actual Elapsed Time	<p>The amount of time that it took to complete a milestone.</p> <p>$(\text{Elapsed Time}) - (\text{Stopped Time}) = (\text{Actual Elapsed Time})$</p> <p> Note: If you want to be able to display this field, Enable stopped time and actual elapsed time must be selected on the Entitlement Settings page.</p>
Completed	Icon that indicates milestone completion.
Completion Date	The date and time the milestone was completed.
Elapsed Time	The time it took to complete a milestone. Automatically calculated to include any business hours on the support record. Elapsed time is calculated only after the Completion Date field is populated.
Entitlement Process	The entitlement process that is being used for the record. Entitlement processes are optional.
Start Date	The date and time that the milestone tracking started.
Stopped Time	<p>How long an agent has been blocked from completing a milestone. For example, an agent might wait for a customer to reply with more information.</p> <p> Note: Enable stopped time and actual elapsed time must be selected on the Entitlement Settings page. Then give your agents access to the field through field-level security.</p>

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit page layouts:

- Customize Application

To create milestones:

- Manage Entitlements AND Customize Application

To enable the Stopped Time and Actual Elapsed Time fields:

- Manage Entitlements

Field	Description
Target Date	The date and time to complete the milestone.
Target Response	The time to complete the milestone. Automatically calculated to include any business hours on the support record.
Time Remaining	The time that remains before a milestone violation. Automatically calculated to include any business hours on the support record.
Time Since Target	The time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the support record.
Violation	Icon that indicates a milestone violation.

2. Add milestone elements to case and work order page layouts.

Use Setup in Salesforce Classic or Lightning Experience.

a. Add milestone fields.

Field	Description
Milestone Status	The milestone's status.
Milestone Status Icon	An icon that corresponds to the milestone status: <ul style="list-style-type: none"> •  Compliant •  Open Violation •  Closed Violation <p> Note: In Lightning Experience: The Milestone Status Icon field on cases isn't available.</p>
Entitlement Process Start Time	The time the record enters the entitlement process.
Entitlement Process End Time	The time the record exits the entitlement process.

b. Add the Case Milestones or Object Milestones related list to display the record's milestones.

In Lightning Experience, the Case Milestones related list isn't supported, and only certain fields in the Object Milestones related list are supported.

Enable Milestone Feed Items

Help support agents monitor support activity by enabling milestone feed items. This option posts a notification to the feed and the record owner's profile page when a milestone is completed or violated.

Important:

- Chatter and entitlements must be enabled in your org.
- Enabling milestone feed items doesn't create feed items for milestones that have already been completed or violated.
- If you add entitlement management to a community, enabling milestone feed items also makes feed items visible to community users.

1. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
2. Select **Enable milestone feed items**. This enables feed items for both cases and work orders. When milestones feed items are posted, agents can click the milestone name to view its details.

Set Up the Milestone Tracker

The milestone tracker gives support agents a complete view of upcoming and completed milestones, and displays countdowns for active and overdue milestones. Add it to the case feed, work order feed, a custom page, or the Service Console.

Often, support agents' performance is measured by how often they meet milestones. The milestone tracker helps agents be prepared for support deadlines by showing them:

- The time remaining until an active milestone reaches its Target Date
- The time passed since an overdue milestone's Target Date
- A list of upcoming milestones
- A list of completed milestones

When a milestone is in progress, the milestone is represented by a green circle. The circle winds down clockwise as time elapses. The remaining time is shown in the center of the circle. When the time to complete the milestone expires, the circle turns red. The amount of time that the milestone is overdue is shown in the center of the circle. If more than 24 hours remain on a milestone, the countdown displays in days (for example, 1d). When fewer than 24 hours remain, the countdown format switches to hours/minutes/seconds.

In Salesforce Classic



EDITIONS

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USER PERMISSIONS

To enable milestone feed items:

- Manage Entitlements

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit page layouts:

- Customize Application

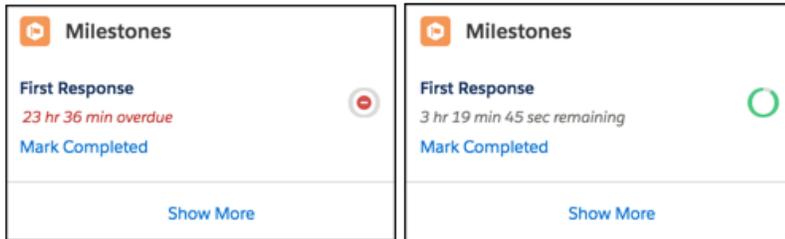
To assign page layouts:

- Manage Users

To set how time displays in the milestone tracker:

- Manage Entitlements

In Lightning Experience



1. Expose the milestone tracker to support agents.

In Salesforce Classic, you can:

- Add it to the case feed. If you plan to use milestones on work orders, follow the same steps to add the tracker to the work order feed.
 - a. From the object management settings for cases, go to Page Layouts.
 - b. In the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - c. In the Other Tools and Components section, select the **Milestone Tracker** and specify where on the page you want it to appear.
 - d. Click **Save**.
- Add it to a custom Visualforce page using the `<apex:milestoneTracker>` component.
- Add it as a component to the Service Console.

In Lightning Experience, go to Lightning App Builder and add the Milestones component. See [Create and Configure Lightning Experience Record Pages](#). In the Lightning App Builder, you can opt to hide the Mark Completed link from your agents.

2. Set how the milestone tracker displays time remaining or time overdue on milestones.

 **Note:** By default, the tracker displays actual hours.

To make it display time remaining or time overdue in business hours, follow these steps.

- a. From Setup, enter *Entitlement Settings* in the Quick Find box, then select **Entitlement Settings**.
- b. In the Milestone Tracker section, deselect **Show the time remaining in actual hours, not business hours**.
- c. Click **Save**.

 **Example:** Suppose an active milestone's business hours are 9 a.m. to 5 p.m. Right now, it's 4:30 p.m. and the milestone's Target Date is 11:00 a.m. tomorrow.

- If the milestone tracker shows the remaining time in business hours (the default setting), it displays a countdown of 2 hours and 30 minutes (4:30 to 5 p.m. today and 9 to 11 a.m. tomorrow).
- If the milestone tracker shows the remaining time in actual hours, it displays a countdown of 18 hours and 30 minutes (4:30 p.m. today to 11:00 a.m. tomorrow).

Limit User Updates to Milestones

Add validation rules to milestones to prevent users from updating milestones unless certain criteria are met.

 **Note:** To create validation rules, use Setup in Salesforce Classic. Don't worry, your validation rules still apply in Lightning Experience.

1. From the object management settings for case milestones, go to Validation Rules.
2. Click **New**.
3. Enter the rule details.
4. Save your changes.

 **Example:** This validation rule prevents users from selecting milestone completion dates that are earlier than the case creation date. You can create a similar validation rule for work orders from the object management settings for Object Milestones in Setup.

Field	Value
Rule Name	<code>milestone_completion_date</code>
Description	<i>A milestone's completion date must be later than the case creation date.</i>
Error Condition Formula	<code>CompletionDate < Case.CreatedDate</code>
Error Message	<i>Error: The milestone completion date must be later than the case creation date.</i>
Error Location	<i>Top of Page</i>

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define or change field validation rules:

- Customize Application

To create or edit milestones:

- Manage Entitlements

Create a Milestone

Milestones represent required steps in your support process, such as case resolution time and first response time. You create master milestones in your org and then add them to entitlement processes to enforce different service levels on support records, like cases and work orders.

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through the process of creating milestones. And it's fun! To get started, see [Entitlement Management](#).

1. From Setup, enter *Milestones* in the Quick Find box, then select **Milestones** under Entitlement Management.
2. Click **New Milestone**.
3. Enter a name and description. Try to name milestones after common support tasks, like "First Response Time" or "Resolution Time." Descriptive names help users understand milestones when they see them on cases, work orders, or entitlement processes.
4. Select a recurrence type.

Recurrence Type	Description	Example
No Recurrence	The milestone occurs only once on the record.	First Response Resolution Time
Independent	The milestone occurs whenever the milestone criteria are met on the record.	Response Time
Sequential	The milestone occurs on repeat whenever the milestone criteria are met on the record.	Customer Contact Made

5. Click **Save**.

You can't apply a milestone to a record by itself. It must be part of an entitlement process. So after you create your milestone, [add it to an entitlement process](#).

 **Tip:** You can add validation rules to a milestone so that users can update a milestone only if it meets specific standards. For details, see [Limit User Updates to Milestones](#).

SEE ALSO:

[Milestone Recurrence Types](#)

EDITIONS

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

USER PERMISSIONS

To create milestones:

- Manage Entitlements

Auto-Complete Case Milestones

Create an Apex trigger that automatically marks milestones Completed on cases that match unique criteria. In your trigger, define which events and related case criteria must be satisfied for a milestone to be marked Completed. You can implement a similar trigger to auto-complete work order milestones.

 **Tip:** In Lightning Experience, agents can click the **Mark Completed** link in the Milestones component to mark a milestone completed. It's not automation, but it is easy. For more information, see [Set Up the Milestone Tracker](#).

The following triggers mark specific types of milestones Completed when the case they are on meets unique criteria. We've also provided a milestone utility Apex class and accompanying unit tests. Define the milestone utility class before you use any of the triggers.

Milestone Utility Apex Class

Apex classes reduce the size of your triggers and make it easier to reuse and maintain Apex code. To define this Apex class in your org:

1. From Setup, enter *Apex Classes* in the Quick Find box, then click **Apex Classes**.
2. Click **New**.
3. Copy the class text and paste it into the text field.
4. Click **Save**.

```
public class MilestoneUtils {
    public static void completeMilestone(List<Id> caseIds,
        String milestoneName, DateTime complDate) {
        List<CaseMilestone> cmsToUpdate = [select Id, completionDate
            from CaseMilestone cm
            where caseId in :caseIds and cm.MilestoneType.Name=:milestoneName
            and completionDate = null limit 1];
        if (cmsToUpdate.isEmpty() == false){
            for (CaseMilestone cm : cmsToUpdate){
                cm.completionDate = complDate;
            }
            update cmsToUpdate;
        }
    }
}
```

Apex Class Unit Test

You can set up Apex unit tests in the developer console to scan your code for any issues.

```
/**
 * This class contains unit tests for validating the behavior of Apex classes
 * and triggers.
 *
 * Unit tests are class methods that verify whether a particular piece
 * of code is working properly. Unit test methods take no arguments,
 * commit no data to the database, and are flagged with the testMethod
 * keyword in the method definition.
 *
 * All test methods in an organization are executed whenever Apex code is deployed
 * to a production organization to confirm correctness, ensure code
 * coverage, and prevent regressions. All Apex classes are
```

EDITIONS

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

USER PERMISSIONS

To define Apex triggers and classes:

- Author Apex

```

* required to have at least 75% code coverage in order to be deployed
* to a production organization. In addition, all triggers must have some code coverage.
*
* The @isTest class annotation indicates this class only contains test
* methods. Classes defined with the @isTest annotation do not count against
* the organization size limit for all Apex scripts.
*
* See the Apex Language Reference for more information about Testing and Code Coverage.
*/
@isTest
private class MilestoneTest {

    static testMethod void TestCompleteMilestoneCase(){

        List<Account> acts = new List<Account>();
        Account myAcc = new Account(Name='TestAct', phone='1001231234');
        acts.add(myAcc);

        Account busAcc = new Account(Name = 'TestForMS', phone='4567890999');
        acts.add(busAcc);
        insert acts;
        Contact cont = new Contact(FirstName = 'Test', LastName = 'LastName', phone='4567890999',
            accountid = busAcc.id);
        insert(cont);

        Id contactId = cont.Id;

        Entitlement entl = new Entitlement(Name='TestEntitlement', AccountId=busAcc.Id);
        insert entl;

        String entlId;
        if (entl != null)
            entlId = entl.Id;

        List<Case> cases = new List<Case>{};
        if (entlId != null){
            Case c = new Case(Subject = 'Test Case with Entitlement ',
                EntitlementId = entlId, ContactId = contactId);
            cases.add(c);
        }
        if (cases.isEmpty()==false){
            insert cases;
            List<Id> caseIds = new List<Id>();
            for (Case cL : cases){
                caseIds.add(cL.Id);
            }
            milestoneUtils.completeMilestone(caseIds, 'First Response', System.now());
        }
    }

    static testMethod void testCompleteMilestoneViaCase(){

        List<Account> acts = new List<Account>();
        Account myAcc = new Account(Name='TestAct', phone='1001231234');

```

```

acts.add(myAcc);

Account busAcc = new Account(Name = 'TestForMS', phone='4567890999');
acts.add(busAcc);
insert acts;
Contact cont = new Contact(FirstName = 'Test', LastName = 'LastName', phone='4567890999',
    accountid = busAcc.id);
insert(cont);

Id contactId = cont.Id;

Entitlement entl = new Entitlement(Name='TestEntitlement', AccountId=busAcc.Id);
insert entl;

String entlId;
if (entl != null)
entlId = entl.Id;

List<Case> cases = new List<Case>{};
for(Integer i = 0; i < 1; i++){
Case c = new Case(Subject = 'Test Case ' + i);
cases.add(c);
if (entlId != null){
c = new Case(Subject = 'Test Case with Entitlement ' + i,
EntitlementId = entlId);
cases.add(c);
}
}

```

Sample Trigger 1

You can create a milestone named Resolution Time that requires cases to be closed within a certain length of time. It's a great way to enforce case resolution terms in SLAs. This sample case trigger marks each Resolution Time milestone Completed when its case is closed. This way, the support agent doesn't have to manually mark the milestone completed after closing the case.

 **Note:** This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Case Triggers* in the Quick Find box, then click **Case Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```

trigger CompleteResolutionTimeMilestone on Case (after update) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        List<Id> updateCases = new List<Id>();
        for (Case c : Trigger.new){
            if (((c.isClosed == true) || (c.Status == 'Closed')) && ((c.SlaStartDate
                <= completionDate) && (c.SlaExitDate == null)))
                updateCases.add(c.Id);
        }
        if (updateCases.isEmpty() == false)

```

```

        milestoneUtils.completeMilestone(updateCases, 'Resolution Time', completionDate);
    }
}

```

Sample Trigger 2

You can create a milestone named First Response that requires agents to get in touch with a case contact within X minutes or hours of the case's creation. It's a nice way to ensure that your support team is communicating with case contacts as soon as possible. This sample email trigger marks a First Response milestone Completed when an email is sent to the case contact. That way, the support agent doesn't have to manually mark the First Response milestone Completed after they email the case contact.

 **Note:** This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Email Triggers* in the Quick Find box, then click **Email Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```

trigger CompleteFirstResponseEmail on EmailMessage (after insert) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        Map<Id, String> emIds = new Map<Id, String>();
        for (EmailMessage em : Trigger.new){
            if(em.Incoming == false)
                emIds.put(em.ParentId, em.ToAddress);
        }
        if (emIds.isEmpty() == false){
            Set <Id> emCaseIds = new Set<Id>();
            emCaseIds = emIds.keySet();
            List<Case> caseList = [Select c.Id, c.ContactId, c.Contact.Email,
                c.OwnerId, c.Status,
                c.EntitlementId,
                c.SlaStartDate, c.SlaExitDate
                From Case c where c.Id IN :emCaseIds];
            if (caseList.isEmpty()==false){
                List<Id> updateCases = new List<Id>();
                for (Case caseObj:caseList) {
                    if ((emIds.get(caseObj.Id)==caseObj.Contact.Email)&&
                        (caseObj.Status == 'In Progress')&&
                        (caseObj.EntitlementId != null)&&
                        (caseObj.SlaStartDate <= completionDate)&&
                        (caseObj.SlaStartDate != null)&&
                        (caseObj.SlaExitDate == null))
                        updateCases.add(caseObj.Id);
                }
                if(updateCases.isEmpty() == false)
                    milestoneUtils.completeMilestone(updateCases,
                        'First Response', completionDate);
            }
        }
    }
}

```

Sample Trigger 3

While the previous trigger dealt with email messages, this sample case comment trigger marks a First Response milestone Completed when a public comment is made on the case. You can use it if a public case comment is a valid first response in your support terms.

 **Note:** This trigger references the milestone utility test class, so be sure to define the test class first.

To define this trigger in your org:

1. From Setup, enter *Case Comment Triggers* in the Quick Find box, then click **Case Comment Triggers**.
2. Click **New**.
3. Copy the trigger text and paste it into the text field.
4. Click **Save**.

```
trigger CompleteFirstResponseCaseComment on CaseComment (after insert) {
    if (UserInfo.getUserType() == 'Standard'){
        DateTime completionDate = System.now();
        List<Id> caseIds = new List<Id>();
        for (CaseComment cc : Trigger.new){
            if(cc.IsPublished == true)
                caseIds.add(cc.ParentId);
        }
        if (caseIds.isEmpty() == false){
            List<Case> caseList = [Select c.Id, c.ContactId, c.Contact.Email,
                c.OwnerId, c.Status,
                c.EntitlementId, c.SlaStartDate,
                c.SlaExitDate
                From Case c
                Where c.Id IN :caseIds];
            if (caseList.isEmpty() == false){
                List<Id> updateCases = new List<Id>();
                for (Case caseObj:caseList) {
                    if ((caseObj.Status == 'In Progress')&&
                        (caseObj.EntitlementId != null)&&
                        (caseObj.SlaStartDate <= completionDate)&&
                        (caseObj.SlaStartDate != null)&&
                        (caseObj.SlaExitDate == null))
                        updateCases.add(caseObj.Id);
                }
                if(updateCases.isEmpty() == false)
                    milestoneUtils.completeMilestone(updateCases,
                        'First Response', completionDate);
            }
        }
    }
}
```

Work with Milestones

Milestones help you give your customers a consistent support experience. Learn about milestones statuses, actions, and recurrence types.

When working with milestones, keeping track of everything is key to success. Here are a few ways you can track all records that have milestones in your org.

- To view work orders with milestones, create a work order report using the Object Milestones custom report type.
- To view cases with milestones, create a case report using the Cases with Milestones custom report type.
- Create list views that filter on milestone fields.

Let's get started!

IN THIS SECTION:

[Where Can I View Milestones?](#)

Your org's settings and configurations for entitlements and milestones determine where you and your agents can view milestones.

[Milestone Statuses](#)

Milestones on support records display one of three statuses.

[Milestone Actions](#)

Milestone actions are time-dependent workflow actions that occur on milestones in an entitlement process. Actions can be added to milestones after the milestone is added to an entitlement process.

[Milestone Recurrence Types](#)

When you create a milestone, you must choose its recurrence type. Learn what each recurrence type means and when to use it.

[Milestones: Supported Objects](#)

Milestones represent required support steps that your team must complete to resolve a customer issue. Find out where you can use milestones in Salesforce.

SEE ALSO:

[Set Up Milestones](#)

Where Can I View Milestones?

Your org's settings and configurations for entitlements and milestones determine where you and your agents can view milestones.

Here's where milestones can appear in your org.

View Milestones From	Available in Salesforce Classic	Available in Lightning Experience	Notes
In Setup			
Milestones page	Yes	Yes	Access this page under the Entitlement Management page.

EDITIONS

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View Milestones From	Available in Salesforce Classic	Available in Lightning Experience	Notes
Entitlement Process page	Yes	Yes	Access this page under the Entitlement Management page. Then click an entitlement process to view its record details and associated milestones.
In the app			
Related list	Yes	No	You can add related lists to pages for cases, work orders, and entitlements. Keep in mind that the Case Milestones related list is for cases and the Object Milestones related list is for work orders.
Feed item updates	Yes	Yes	Enable milestone feed items in your org.
Tracker	Yes	Yes (for Case Milestones only)	In Lightning Experience, add the Milestones component to the Lightning page for cases and work orders using Lightning App Builder.

In the Salesforce app, agents can view case milestone updates in the case feed, open the case milestones record page, and view the Case Milestones related list. Agents can't view the milestone tracker.

SEE ALSO:

[Customize Milestone Page Layouts](#)

[Enable Milestone Feed Items](#)

[Set Up the Milestone Tracker](#)

Milestone Statuses

Milestones on support records display one of three statuses.

Status	What It Means	Example
Compliant	<p>Milestones on the record are either complete or not in violation.</p> <p> Important: New records display as compliant because they're not in violation.</p>	The first response on a case is complete or not in violation.
Open Violation	One or more milestones on the record have been violated, and steps in the support process are incomplete.	The assigned agent didn't complete the first response on a case before the milestone expired.

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Status	What It Means	Example
Closed Violation	One or more milestones on the record were violated, but the steps in the support process were still completed.	The assigned agent completed the first response on a case after the milestone expired.

The status icons you see differ based on where the milestone appears and whether you're in Salesforce Classic or Lightning Experience. In Salesforce Classic, milestones display in the following locations:

- On the Milestone Status Icon field and Case Milestones related list
 - Compliant: 
 - Open Violation: 
 - Close Violation: 
- In the milestone tracker
 - Completed: 
 - Violated: 

In Lightning Experience, milestones display in the Milestone component:

- Completed: 
- Violated: 

 **Note:** For a list of Lightning Experience limitations related to milestones, see [Entitlement Management Limits and Limitations](#).

If milestone feed items are enabled, icons also display in the feed. Remember that these feed item icons are different in Salesforce Classic and Lightning Experience.

SEE ALSO:

[Work with Entitlement Processes](#)

[Add a Milestone to an Entitlement Process](#)

[Milestone Actions](#)

Milestone Actions

Milestone actions are time-dependent workflow actions that occur on milestones in an entitlement process. Actions can be added to milestones after the milestone is added to an entitlement process.

For example, you can create a milestone action that:

- Sends an email alert to certain users an hour before a First Response milestone is near violation
- Updates certain fields on a case one minute after a First Response milestone successfully completes

You can add three types of actions to milestones:

Action Type	Description
 Success Actions	The actions to take when a milestone successfully completes. Success actions still fire on milestones that are completed late.

EDITIONS

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Action Type	Description
 Warning Actions	The actions to take when a milestone is near violation.
 Violation Actions	The actions to take when a milestone is violated.

You can automate the following actions for each action type:

Workflow Action	What It Does	Example
New Task	Create a workflow task	Create a task for a support agent to call a customer when a First Response milestone is violated.
New Email	Create an email alert	Notify case owners when a First Response milestone on their case is near violation.
New Field Update	Define a field update	Update the case Priority field to High when a First Response milestone is near violation.
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a First Response milestone is completed.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

SEE ALSO:

[Add a Milestone Action to an Entitlement Process](#)

[Work with Entitlement Processes](#)

[How a Record Moves Through an Entitlement Process](#)

Milestone Recurrence Types

When you create a milestone, you must choose its recurrence type. Learn what each recurrence type means and when to use it.

There are three milestone recurrence types in Salesforce:

Recurrence Type	What It Means	How the Start Date is Determined	Examples
No Recurrence	The milestone only occurs once on the support record*.	The Start Date is the time when the milestone criteria are met on the record.	"First Response" "Resolution Time"
Independent	The milestone occurs whenever the	The Start Date is the time when the	"Response Time"

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Recurrence Type	What It Means	How the Start Date is Determined	Examples
	<p>milestone criteria match the record criteria.</p> <p> Note: Only one occurrence of an independently recurring milestone can be active at a time.</p>	<p>milestone criteria are met on the record, regardless of when the previous occurrence was completed.</p>	
Sequential	<p>The milestone occurs on repeat whenever the milestone criteria match the record criteria.</p> <p> Note: Only one occurrence of a sequentially recurring milestone can be active at a time.</p>	<p>For the first occurrence, the Start Date is the time when the milestone criteria are met on the case.</p> <p>For future occurrences:</p> <ul style="list-style-type: none"> The Start Date is the time when the milestone criteria are met on the record, as long as it's later than the previous occurrence's Target Date. If an occurrence is completed <i>before</i> its Target Date and the milestone criteria are met on the record again, the next occurrence starts at the previous occurrence's Target Date. If an occurrence is completed <i>after</i> its Target Date, the next occurrence's Start Date is the time when the milestone criteria are met on the record. 	"Customer Contact Made"

*In these definitions, a support record includes cases and work orders.



Example:

No Recurrence Type

A milestone named "Resolution Time" is set up to ensure that cases are resolved within 4 hours. The milestone has one criterion: *Case: Status EQUALS New, Working, Escalated.*

Here's how this milestone can be used:

- At 10 a.m., a case is created whose Status is `New`, causing the milestone criteria to match the case criteria.
- The "Resolution Time" milestone is automatically created with these settings:

- Start Date = 10 a.m. (the current time)
- Target Date = 2 p.m. (4 hours from the Start Date)

3. At 1 p.m., the support agent resolves the customer's issue and closes the case, and the milestone is marked complete.

Independent

A milestone named "Engineer Solution Proposed" is set up to track case escalation to Engineering. When this milestone occurs, the support agent expects a proposed solution from Engineering within 4 hours. The milestone has one criterion: "*Case : Status EQUALS Waiting on Engineer*" (a custom status).

Here's how this milestone can be used:

1. At 10 a.m., the support agent escalates a case to Engineering, causing the milestone criteria to match the case criteria.
2. An occurrence of the "Engineer Solution Proposed" milestone is automatically created with these settings:
 - Start Date = 10 a.m. (the current time)
 - Target Date = 2 p.m. (4 hours after the Start Date)
3. At 11 a.m., well before the Target Date, an engineer proposes a solution that's sent to the customer. The milestone is marked complete manually or via a workflow.

If the proposed solution works, there may be no other occurrences of the "Engineer Solution Proposed" milestone on the case. However, if the solution doesn't solve the customer's issue, another occurrence would be created:

1. At 1 p.m., the support agent re-escalates the case to Engineering, causing the milestone criteria to match the case criteria.
2. A second occurrence of the "Engineer Solution Proposed" milestone is created with these settings:
 - Start Date = 1 p.m. (the current time)
 - Target Date = 5 p.m. (4 hours after the Start Date)

The case now has two "Engineer Solution Proposed" milestones:

- One completed milestone that started at 10 a.m.
- One incomplete milestone that started at 1 p.m. and has a Target Date of 5 p.m.

The milestone can recur as many times as necessary until the entitlement process is completed.

Sequential

A milestone named "Customer Contact Made" is set up to track daily contact with a customer as part of an SLA. When this milestone occurs, the support agent has 24 hours to communicate with the customer.

Here's how this milestone can be used:

1. At 10 a.m. on Monday, a case is created whose entitlement process includes the "Customer Contact Made" milestone. The milestone has these settings:
 - Start Date = 10 a.m. Monday (the current time)
 - Target Date = 10 a.m. Tuesday (24 hours after the Start Date)
2. At 11 a.m. on Monday, the support agent communicates with the customer. This means that the milestone can be marked complete, and milestone's second occurrence is created. However, because the previous occurrence's Target Date is still in the future, the Start Date of the second occurrence is 10 a.m. Tuesday.

The case now has two "Customer Contact Made" milestones:

- One completed milestone that started at 10 a.m. Monday
- One incomplete milestone that is scheduled to start at 10 a.m. Tuesday with a Target Date of 10 a.m. Wednesday

If the support agent communicates with the customer multiple times on Monday, it doesn't affect the Tuesday milestone.

SEE ALSO:

[Work with Entitlement Processes](#)

[Add a Milestone to an Entitlement Process](#)

Milestones: Supported Objects

Milestones represent required support steps that your team must complete to resolve a customer issue. Find out where you can use milestones in Salesforce.

What types of records can I add milestones to?

- Cases
- Work orders

How do I add milestones to a record?

Here are the general steps you'll follow:

1. Create "master" milestones in Setup that represent required steps in your support process.
2. Add the milestones to an entitlement process, which is a customizable timeline of milestones.
3. Apply the entitlement process to a customer entitlement.

When you link a support record, such as a work order, to an entitlement that includes an entitlement process, the process—with its milestones—is automatically applied to the record. To learn more, see [Set Up Milestones](#).

Can I use the same entitlement for work orders and cases?

If the entitlement has an entitlement process associated with it, don't use the entitlement for multiple types of support records. Every entitlement process has a type—Case or Work Order—and a process only works on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process runs only on cases associated with the entitlement. If a work order is also associated with the entitlement, the process doesn't run on the work order.

When I create a milestone, can I add it to both types of entitlement processes?

Yes. For example, if you create a First Response milestone in Setup, you can add it to both Case and Work Order entitlement processes.

How do I set the type of an entitlement process?

You select the type when you create the entitlement process. Entitlement processes created before Summer '16 use the Case type. You can see an entitlement process's type on its detail page.

Can I change the type of an entitlement process?

No. Once an entitlement process is created, all its versions must use the same type. Want to make the most of a particularly awesome entitlement process? Remember that you can easily create a similar process of a different type using the same milestones.

Are milestones supported in Lightning Experience?

Milestones are available in Lightning Experience with some limitations. For details, see [Entitlement Management Limits and Limitations](#).

Where do I manage milestones in my org?

- View and create milestones from the Milestones node in Setup under Entitlement Management.
- Manage case milestone page layouts and validations rules from the Case Milestones node in Setup.
- Manage work order milestone page layouts and validation rules from the Object Milestones node in Setup.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Entitlement Processes

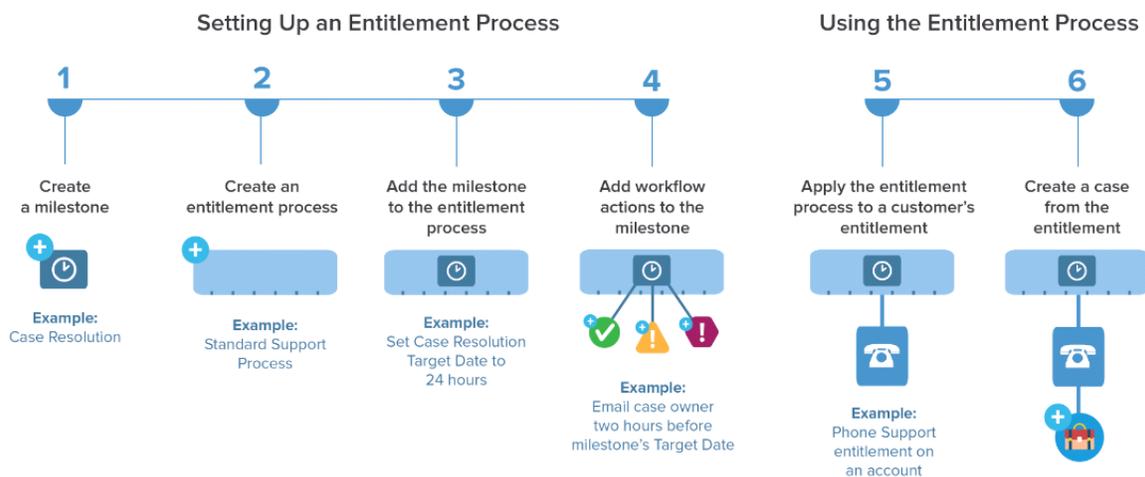
Entitlement processes are timelines that include all the steps (or milestones) that your support team must complete to resolve support records like cases or work orders. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

Not all entitlements require entitlement processes. For example, an entitlement might just state that a customer is eligible for phone support and business hours define phone support to be 24/7. If you need to add more to that definition—for example, if certain people must be emailed after a customer's case goes unresolved for two hours—use an entitlement process.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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



IN THIS SECTION:

[Set Up Entitlement Processes](#)

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases or work orders. Set up an entitlement process to apply to entitlements in your Salesforce org.

[Work with Entitlement Processes](#)

Entitlement processes help you provide a consistent level of support to your customers. Learn how entitlement processes work and how to update them.

Set Up Entitlement Processes

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases or work orders. Set up an entitlement process to apply to entitlements in your Salesforce org.

IN THIS SECTION:

1. [Create an Entitlement Process](#)

Create an entitlement process to give support agents a timeline of required steps to follow when solving support records. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

2. [Customize Entitlement Process Fields](#)

If you intend to use entitlement processes in your Salesforce org, customize page layouts to ensure that support agents can see and interact with entitlement processes.

3. [Add a Milestone to an Entitlement Process](#)

Add milestones to entitlement processes to define required steps in your support process.

4. [Add a Milestone Action to an Entitlement Process](#)

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. After you create an entitlement process and add milestones to it, add milestone actions to the milestones.

5. [Apply an Entitlement Process to an Entitlement](#)

You've created an entitlement process; now it's time to use it! Apply an entitlement process to a customer's entitlement so all support records linked to the entitlement use that process.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

Create an Entitlement Process

Create an entitlement process to give support agents a timeline of required steps to follow when solving support records. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

You must create milestones before you create an entitlement process.

 **Tip:** The Entitlement Management Trailhead module introduces you to common terms and walks you through creating an entitlement process. And, it's fun! To get started, see [Entitlement Management](#).

1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes** under Entitlement Management.
2. Click **New Entitlement Process**.
3. Select an entitlement process type. If you intend to use the process to enforce milestones on cases, select Case. If you intend to use the process to enforce milestones on work orders, select Work Order. (If work orders aren't enabled in your org, you only see the Case option.)

 **Note:** If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.
4. Enter a name—for example, *Standard Support Process*—and a description.
5. If you want to enable the process, select **Active**.

 **Tip:** We recommend waiting to activate an entitlement process until you add milestone actions to it. You can't update or delete milestone actions on a process after it's activated and applied to a record.

6. Optionally, if entitlement versioning is enabled, select **Default Version** to make this version of the entitlement process the default.
7. Choose the criteria for records to enter and exit the entitlement process.

Field	Description	More Actions to Take?
Record* enters the process	<p>Based on record created date</p> <p>Select if records should enter the process when they're created.</p>	No
	<p>Based on a custom date/time field on the record</p> <p>Select if you want the value of a custom date/time field on the record to determine when the record enters the process.</p>	Yes, a drop-down list displays for selecting the custom date/time. You can only choose a custom date/time, not a custom date.
Record exits the process	<p>Based on when record is closed</p> <p>Select if records should exit the process when they're closed.</p>	No

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view entitlements:

- Read on entitlements

To change entitlements:

- Edit on entitlements

To create and update entitlement processes:

- Manage Entitlements

Field	Description	More Actions to Take?
	<p>Based on custom criteria</p> <p>Select if records should exit the process based on criteria you define.</p>	<p>Yes, select one of the following:</p> <ul style="list-style-type: none"> Choose <code>criteria are met</code> and select the filter criteria that a record must meet for it to exit the process. For example, set a case filter to <code>Priority equals Low</code> if you want cases with the <code>Priority</code> field marked <code>Low</code> to exit the process. Choose <code>formula evaluates to true</code> and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True." Choose <code>formula evaluates to true</code> and enter a formula that returns a value of "True" or "False." Records exit the process if the formula returns "True." For example, the formula <code>(Case: Priority equals Low) AND (Case: Case Origin equals Email, Web)</code> moves cases out of the process if their <code>Priority</code> field is <code>Low</code> and the <code>Case Origin</code> field is marked <code>Email</code> or <code>Web</code>.

*The field names you see will reflect the entitlement process type you selected.

- Optionally, choose the business hours you'd like to apply to the entitlement process. The business hours you set here calculate the Target Date for all the milestones on this entitlement process. To learn more, see [How Business Hours Work in Entitlement Management](#).
- Save your changes.

 **Important:** All users, even those without the "View Setup and Configuration" user permission, can view entitlement processes via the API.

Customize Entitlement Process Fields

If you intend to use entitlement processes in your Salesforce org, customize page layouts to ensure that support agents can see and interact with entitlement processes.

1. Add these fields to case and work order page layouts.

Field	Description
Timeline (available only on case page layouts)	<p>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:</p> <ul style="list-style-type: none"> •  Completed milestone •  Violated milestone <p>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.</p>
Stopped	<p>Lets you stop an entitlement process on a record, which might be necessary if you're waiting for a customer's response.</p> <p> Tip: If you want to use this feature, give your agents access to the field through field-level security.</p> <p>If a case is stopped and a user doesn't have access to the field, the Case Milestone component in Lightning Experience continues to track time for them, even though the timer is paused. Until the Stopped field is updated (unpaused), each time the user refreshes the case record, the milestone timer restarts from where it was paused. Don't confuse your users; give them access to the Stopped field.</p>
Stopped Since	The date and time the entitlement process was stopped on the record.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

- To edit page layouts:
- Customize Application

2. Save your changes.

Add a Milestone to an Entitlement Process

Add milestones to entitlement processes to define required steps in your support process.

1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
2. Click the name of an entitlement process.
3. If you're using versioning, click the name of the entitlement process again under Entitlement Process Versions.
4. Click **New** on the Milestones related list.
5. Choose the milestone.
6. In **Time Trigger (Minutes)**, enter the number of minutes in which users must complete the milestone before it triggers an action.

Or, if you'd like the trigger time for the milestone to be calculated dynamically based on the milestone type and properties of the case or work order, click **Enable Apex Class for the Time Trigger (Minutes)**.

 **Note:** You must have a custom Apex class that implements the `Support.MilestoneTriggerTimeCalculator` Apex interface to use this option.

7. If you selected **Enable Apex Class for the Time Trigger (Minutes)**, use the lookup to specify an Apex class for the dynamically calculated milestone.
8. Choose when the milestone starts:

Select	To	Use If
Milestone Criteria	Calculate the milestone <code>Target Date</code> when the milestone is applied to a support record (matches the record criteria).	A milestone's <code>Target Date</code> is based on when it's applied to a record. Use if the milestone is recurring.  Note: An entitlement process usually starts when the record is created, but its milestones aren't always applied right away.
Entitlement Process	Calculate the milestone <code>Target Date</code> when the entitlement process starts (by default, when a support record is created).	A milestone's <code>Target Date</code> is based on the start of the entitlement process. For example, first response and resolution times on a case always calculate their <code>Target Date</code> when the entitlement process starts.

9. Optionally, select the business hours that you want to apply to the `Target Date` calculation for this milestone. If you don't specify business hours for the milestone, then the Entitlement Process business hours are used. If neither are specified, then the business hours on the case or work order are used.
10. Specify the order in which Salesforce should process the milestones. This applies to situations where a support record matches the criteria of multiple milestones at the same time.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add milestones to entitlement processes:

- Manage Entitlements

11. Enter the criteria a record must match for the milestone to apply to it:

- Choose `criteria are met` and select the filter criteria that a record must meet for a milestone to apply to it. For example, set a case filter to `Priority equals High` if you want the milestone to apply to cases with the `Priority` field marked High.

Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." Salesforce triggers the rule if the formula returns "True."

- Choose `formula evaluates to true` and enter a formula that returns a value of "True" or "False." The milestone applies to records if the formula returns "True." For example, the formula `(Case: Priority equals High) AND (Case: Case Origin equals Email, Web)` applies the milestone to cases where the `Priority` field is High and the `Case Origin` field is marked Email or Web. You can't use the `Case Owner` field in formulas.

12. Click **Save**.

-  **Note:** Milestones are measured in minutes and seconds, but their start and end times are only accurate to the minute. For example, suppose a milestone is triggered at 11:10:40 a.m. and the time to complete the milestone is 10 minutes. In this case, the milestone target time is 11:20:00 am, not 11:20:40. As a result, the remaining time for the agent to complete the milestone is 9 minutes and 20 seconds, not the full 10 minutes.

SEE ALSO:

[Milestone Statuses](#)

[Milestone Actions](#)

Add a Milestone Action to an Entitlement Process

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. After you create an entitlement process and add milestones to it, add milestone actions to the milestones.

- From Setup, enter *Entitlement Processes* in the `Quick Find` box, then select **Entitlement Processes**.
- Click the name of an entitlement process.
- Click the name of a milestone on the Milestones related list.
- If you want to add a warning or violation action, add a time trigger first. After you add a trigger, the option to add a workflow action appears. Success actions use the milestone's time trigger.

-  **Tip:** If you want a violation action to fire immediately after the milestone is violated, set the time trigger to 0 minutes.

- Click **Add Workflow Action** and select an option.

Workflow Action	What It Does	Example
New Task	Create a workflow task	Create a task for a support agent to call a customer when a First Response milestone is violated.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add milestone actions to entitlement processes:

- Manage Entitlements AND Customize Application

Workflow Action	What It Does	Example
New Email	Create an email alert	Notify case owners when a First Response milestone on their case is near violation.
New Field Update	Define a field update	Update the case Priority field to <code>High</code> when a First Response milestone is near violation.
New Outbound Message	Define an outbound message	Send data about parts or services to an external system after a First Response milestone is completed.
Select Existing Action	Select an existing action	Use an existing email alert to notify a case owner when their case is near violation of a first response.

 **Note:** Time-triggered actions only occur during your Salesforce org's business hours. You can add up to 10 actions and 10 time triggers to each type of milestone action.

SEE ALSO:

[Milestone Actions](#)

Apply an Entitlement Process to an Entitlement

You've created an entitlement process; now it's time to use it! Apply an entitlement process to a customer's entitlement so all support records linked to the entitlement use that process.

1. Go to the entitlement.
2. In the `Entitlement Process` lookup field, select the process you want to apply.

 **Important:** If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.

3. Click **Save**.

 **Tip:** If you've set up entitlement templates, you can associate an entitlement process with a template so all entitlements created using that template automatically use the selected entitlement process.

SEE ALSO:

[How a Record Moves Through an Entitlement Process](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit entitlements:

- Edit on entitlements

Work with Entitlement Processes

Entitlement processes help you provide a consistent level of support to your customers. Learn how entitlement processes work and how to update them.

You can create up to 1,000 entitlement processes total, with up to 10 milestones per process. If your org was created before Summer '13, its maximum entitlement processes can be lower. Contact Salesforce to increase it.

 **Note:** If you're using entitlement processes, manage customers' work orders and cases on separate entitlements. This is because an entitlement process only runs on records that match its type. For example, when a Case entitlement process is applied to an entitlement, the process only runs on cases associated with the entitlement. If a work order is also associated with the entitlement, the process won't run on the work order.

To view or cancel active entitlement processes, from Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**. You can also use the entitlement process queue to view or cancel active entitlement process actions. (Entitlement process monitoring isn't available in Professional Edition orgs.)

 **Tip:** Entitlement process versioning lets you update existing entitlement processes, even if they're assigned to active entitlements and cases. This can be useful if the business rules behind your entitlement processes change, for example, or if you need to create multiple versions of the same entitlement process that have only minor differences.

 **Important:** All users, even those without the "View Setup and Configuration" user permission, can view entitlement processes via the API.

IN THIS SECTION:

[How a Record Moves Through an Entitlement Process](#)

When an entitlement process is applied to an entitlement, the entitlement process runs on all support records linked to the entitlement. Learn how support records like cases and work orders move through an entitlement process.

[How Business Hours Work in Entitlement Management](#)

When a support record is linked to an entitlement, the record, its milestones, its entitlement process, and the entitlement itself can each use different business hours. Learn how Salesforce approaches business hours in these situations.

[Updating an Entitlement Process](#)

Entitlement versioning lets you create multiple versions of an entitlement process, even if it's assigned to active entitlements and support records.

[Create a New Version of an Entitlement Process](#)

Entitlement versioning lets you create multiple versions of an entitlement process, even if it's assigned to active entitlements and support records. You can use multiple versions of an entitlement process at the same time in your Salesforce org.

[Use a New Version of an Entitlement Process](#)

After you create a new version of an entitlement process, you can choose to apply it to all entitlements assigned to the previous version, or only to new entitlements. When you apply an entitlement process to an entitlement, it also applies the process to that entitlement's active support records.

SEE ALSO:

[Set Up Entitlement Processes](#)

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

How a Record Moves Through an Entitlement Process

When an entitlement process is applied to an entitlement, the entitlement process runs on all support records linked to the entitlement. Learn how support records like cases and work orders move through an entitlement process.

1. A support agent linked a record to an entitlement that has an entitlement process. This can be done in several ways:
 - The support agent creates the record from the Cases or Work Orders related list on the entitlement.
 - The support agent creates the record, then uses the Entitlement lookup field on the record to select the proper entitlement.
2. The record enters the process based on its creation date or a custom date/time field. A custom date/time field lets users edit a date on the record to trigger when it enters the process.
3. Salesforce assigns milestones with matching criteria to the record. For example, if a milestone's criteria is *Priority equals High*, and a case has a Priority of *High*, Salesforce assigns it to the *Priority equals High* milestone. A record associates with one milestone at a time. It can associate with many milestones as it moves through the process.
4. Milestone actions determine when and if warning, violation, or success workflow actions fire for the record.
5. A support agent updates the record to complete a milestone action.
6. After a record is updated, it cycles through the entitlement process and initiates any milestones that match its criteria.
7. The record exits the process based on custom criteria or when it's closed.

You can view records with assigned entitlements by creating case or work order list views that filter on entitlement process fields.

SEE ALSO:

[Set Up Entitlements](#)

[Entitlement Management Setup Checklist](#)

How Business Hours Work in Entitlement Management

When a support record is linked to an entitlement, the record, its milestones, its entitlement process, and the entitlement itself can each use different business hours. Learn how Salesforce approaches business hours in these situations.

On records that include entitlement processes, business hours are applied according to a hierarchy. Salesforce uses the business hours specified at the highest level.

EDITIONS

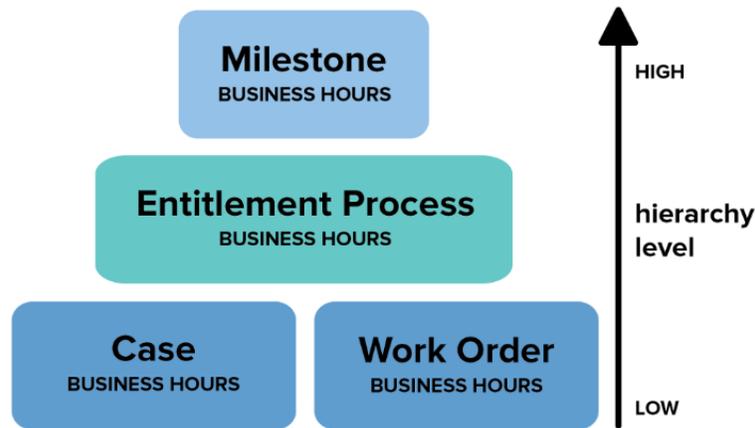
Available in both: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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



So a milestone’s business hours override the entitlement process’ business hours, which override the case or work order’s business hours. If no business hours are set on the milestone, then the entitlement process business hours are used. And if business hours aren’t specified on the milestone or the entitlement process, the case or work order business hours are used.

You can also set business hours on entitlements. If you create a record from an entitlement, it inherits the entitlement’s business hours. However, if the entitlement is part of an entitlement process, we recommend leaving the entitlement’s business hours field blank. Related records automatically use the entitlement process’ business hours.

When setting business hours, follow these best practices:

- If you want to use the same entitlement process for records that have different business hours, set business hours at the entitlement process level. For example, suppose that you set the business hours on an entitlement process to weekdays from 9 to 5. If a customer requests evening and weekend updates to their case, you can create an “Update Customer” milestone with its own 24/7 business hours.
- If you want to use different business hours for different severity levels, set business hours at the milestone level. For example, if the severity level of a case increases, the customer may need to be contacted more frequently. You can create a “Last Touch” milestone that changes business hours according to severity level while the other milestones in the entitlement process remain unchanged.

SEE ALSO:

[Set Up Entitlement Processes](#)

Updating an Entitlement Process

Entitlement versioning lets you create multiple versions of an entitlement process, even if it’s assigned to active entitlements and support records.

Use entitlement versioning if:

- You want to make several versions of an entitlement process that have minor differences
- You want to update an entitlement process to reflect changes in your business processes

You might find that an entitlement process needs to be updated seasonally, or that you need to roll back to a previous version.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

When you create a new version of an entitlement process, you can change any of the following:

- Name
- Description
- Whether the process is active
- Whether the version is the default
- Entry criteria
- Exit criteria

You can also add notes about the version. This makes it easy to differentiate between multiple versions of the same process, especially if they have the same name.

On new versions of entitlement processes that are currently in use, you can add new milestones, but you can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.

Once you create a new version of an entitlement process, you can choose to apply it to all entitlements and support records assigned to the previously used version, or only to new entitlements and support records. All versions of an entitlement process must be the same type: Case or Work Order.

SEE ALSO:

[Create a New Version of an Entitlement Process](#)

[Use a New Version of an Entitlement Process](#)

Create a New Version of an Entitlement Process

Entitlement versioning lets you create multiple versions of an entitlement process, even if it's assigned to active entitlements and support records. You can use multiple versions of an entitlement process at the same time in your Salesforce org.

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
2. Click the name of the entitlement process for which you want to create a new version.
3. In the Entitlement Process Versions list, click the version of the process from which you want to create a new version.
4. On the Entitlement Process Detail page, click **Create New Version**.
5. Add details about the new version. Follow these best practices:

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and update entitlement processes:

- Manage Entitlements

- Use the `Version Notes` field to explain what makes the version you're creating different from others. This makes it easier to differentiate between multiple versions of the same entitlement process.
- Leave the name as is.
- Click **Active** to be able to use the new version.
- Click **Default** if you want to make the new version the default version of the process. This makes it easier to find in lookup field searches.

6. Click **Save**.

After saving, you can modify the entitlement process' milestones if needed.

 **Important:**

- On new versions of entitlement processes that are currently in use, you can add new milestones, but you can't edit existing ones. On new versions of processes that aren't currently in use, you can both add new milestones and edit existing ones.
- All versions of an entitlement process must be the same type.

When you create a new version of an entitlement process, it isn't automatically applied to entitlements that were using the previous version. To learn how to apply a new version of an entitlement process to existing and new entitlements, see [Use a New Version of an Entitlement Process](#).

SEE ALSO:

[Updating an Entitlement Process](#)

Use a New Version of an Entitlement Process

After you create a new version of an entitlement process, you can choose to apply it to all entitlements assigned to the previous version, or only to new entitlements. When you apply an entitlement process to an entitlement, it also applies the process to that entitlement's active support records.

 **Note:** To create multiple versions of entitlement processes, entitlement versioning must be enabled in your org. Select **Enable Entitlement Versioning** on the Entitlement Settings page in Setup.

When you create versions of entitlement processes with the same name, the version number and notes help you differentiate between versions. Salesforce prevents you from disabling entitlement versioning so you always know which version you're working with.

Applying an Entitlement Process to a New Entitlement

Scenario: You're creating an entitlement and want to apply a particular version of an entitlement process to it.

1. Choose the entitlement process you want in the Entitlement Process lookup field on the entitlement.

 **Tip:** After you click the lookup icon on the Entitlement Process field, select "All Versions" in the lookup dialog box. Otherwise, you can only choose from the default versions of existing entitlement processes.

Applying an Entitlement Process to an Existing Entitlement

Scenario: You made a new version of an entitlement process, and you want to switch all the entitlements that were using the previous version over to your new version.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and update entitlement processes:

- Manage Entitlements

1. From Setup, enter *Entitlement Processes* in the Quick Find box, then select **Entitlement Processes**.
2. Click the name of the entitlement process you want to work with.
The list on the main Entitlement Processes page shows the default version of each process. Click the name of a process to see a list of all available versions of it.
3. On the detail page for the entitlement process, click the name of the new version that you want to apply to existing entitlements (and by default, to cases or work orders linked to those entitlements).
4. Click **New Update Rule**.
5. Choose the version of the entitlement process you want to update from.
You can update from any other version of the process, whether or not it's active.
6. Depending on the differences between the old and new versions of the entitlement process, updating an entitlement to the new version can trigger milestone warning and violation actions on that entitlement's support records (such as cases or work orders). To avoid such warnings and violation actions, select **Don't Trigger New Milestone Warnings and Violations**. We recommend selecting this so you don't trigger violation warnings on old entitlements and support records.
7. Click **Save**.
The update rule detail page shows the estimated number of entitlements and support records that will be updated to use the new process.
8. Click **Start** to begin the update process.

Usually the update process completes within an hour, but it depends on the number of entitlements and records being updated. Throughout the update process, the update rule detail page refreshes periodically to show the number of entitlements and records processed. To stop the update at any time, click **Stop**.

When the update rule displays a **Completed** status, all related entitlements and support records have been updated to use the new version of the entitlement process. If the status is **Completed With Exceptions**, some records couldn't be updated to the new version because of errors. To find out which records weren't updated and why, contact Salesforce Support.

SEE ALSO:

- [Set Up Entitlement Processes](#)
- [Updating an Entitlement Process](#)
- [Create a New Version of an Entitlement Process](#)

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.

IN THIS SECTION:

- [Set Up Service Contracts](#)
Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).
- [Add Contract Line Items to Service Contracts](#)

Set up contract line items to be able to specify which products a service contract covers. Contract line items only display to users on the Contract Line Items related list on service contracts (not on contracts!). You can only use contract line items if your Salesforce org uses products.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

[Work with Service Contracts](#)

Service contracts are an advanced entitlement feature that help you track your customer support agreements. Learn how to create and manage service contracts.

[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.

Set Up Service Contracts

Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

 **Note:** Entitlements must be enabled in your org for you to set up service contracts.

From the object management settings for service contracts:

1. Customize service contract fields.

This lets you control what information users add to service contracts. You can create custom service contract fields that are specific to your industry or support process.

2. Customize service contract page layouts.

This lets you specify which fields and related lists users see on service contracts. Consider making the following customizations:

- Add the `Status Icon` field so users can easily see whether the service contract is active, expired, or inactive.
- To let users make one service contract the parent of another, add the `Parent Service Contract` field and `Child Service Contracts` related list. You can also add the read-only `Root Service Contract` field so users can see the top-level service contract in a service contract hierarchy. A service contract hierarchy can contain up to 10,000 service contracts.

3. Set field-level security on service contract fields.

This lets you choose which service contract fields users can access.

4. Set field history tracking on service contracts.

This lets you see when field values were changed. Changes are listed in the `Service Contract History` related list on service contracts. From the object management settings for service contracts, go to the fields section, and then click **Set History Tracking**.

5. Make the Service Contracts tab visible in Salesforce and any custom apps.

The `Service Contracts` tab is where users create and edit service contracts and contract line items. Add the tab to an app or instruct your users to add it to an existing tab set in Salesforce. Users need the "Read" permission on service contracts to see the `Service Contracts` tab.

6. Add the Service Contracts related list to account and contact page layouts.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up service contracts:

- `Manage Entitlements`
- AND
- `Customize Application`

This lets users create, update, and verify service contracts from accounts and contacts.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

[Add Contract Line Items to Service Contracts](#)

Add Contract Line Items to Service Contracts

Set up contract line items to be able to specify which products a service contract covers. Contract line items only display to users on the Contract Line Items related list on service contracts (not on contracts!). You can only use contract line items if your Salesforce org uses products.

 **Note:** Entitlements must be enabled in your org for you to set up contract line items.

From the object management settings for contract line items:

1. Customize contract line item fields.

This lets you control what information users add to contract line items. You can create custom contract line item fields that are specific to your industry or support process.

2. Customize contract line item page layouts.

This lets you specify which fields and related lists users see on contract line items. Consider making the following customizations:

- Add the `Status Icon` field so users can easily see whether the line item is active, expired, or inactive.
- To let users make one line item the parent of another, add the `Parent Contract Line Item` field and `Child Contract Line Items` related list. You can also add the read-only `Root Contract Line Item` field, which lists the top-level line item in a contract line item hierarchy. A contract line item hierarchy can contain up to 10,000 line items.

3. Customize other objects' page layouts.

This lets you choose how users can associate contract line items with other records. Consider making the following customizations:

- (Required) Add the `Contract Line Items` related list to service contract page layouts. This lets users create, edit, and delete contract line items from service contracts.
- Add the `Contract Line Items` related list to asset layouts. This lets users view and change associations between assets and contract line items.
- Add the `Contract Line Item` lookup field to entitlement page layouts. This lets users associate a line item with a particular entitlement.

4. Set field-level security on contract line items.

This lets you choose which contract line item fields users can access.

5. Set field history tracking on contract line items.

This lets you see when field values were changed. Changes are listed in the `Contract Line Item History` related list on contract line items. From the object management settings for contract line items, go to the fields section, and then click **Set History Tracking**.

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up service contracts and contract line items with entitlements:

- **Manage Entitlements**
- AND
- Customize Application**

 **Note:** Schedules aren't available for contract line items, and community users can't access them.

SEE ALSO:

[Entitlement Management Setup Checklist](#)

Work with Service Contracts

Service contracts are an advanced entitlement feature that help you track your customer support agreements. Learn how to create and manage service contracts.

Use service contracts 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 and Lightning Experience

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:

[Set Up Service Contracts](#)

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 contracts 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 and Lightning Experience

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.
Contact Name	The contact associated with the service contract. Select from the drop-down list.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Field	Description
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 <code>End Date</code> to 365 days after the <code>Start Date</code> .
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.
Price Book	The price book associated with the service contract. Only products from the specified price book can be added to the service contract as contract line items.

Field	Description
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)
Service Contract Owner	The assigned owner of the service contract.
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 <code>Start Date</code> to the date when the <code>Status</code> 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 <code>Start Date</code> and <code>End Date</code> . The status is: <ul style="list-style-type: none"> • Active if the system date is equal to or later than the <code>Start Date</code> and equal to or earlier than the <code>End Date</code>. • Expired if the system date is later than the <code>End Date</code>. • Inactive if the system date is earlier than the <code>Start Date</code>.
Status Icon	Represents the service contract's status with one of the following icons: <ul style="list-style-type: none"> •  Active •  Expired •  Inactive

Field	Description
Subtotal	Total of the service contract line items (products) before discounts, taxes, and shipping are applied. (Read only)
Tax	Total taxes for the service contract. This is a currency field, so enter the amount, not percentage. For example, enter <i>\$10.50</i> .
Term (months)	Number of months that the service contract is in effect. This field is independent of the <code>Start Date</code> and <code>End Date</code> values. Depending on how your business uses service contracts, you may choose to hide the <code>Term</code> field or set up data validation that populates the <code>End Date</code> when a <code>Term</code> 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.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

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.

In the Salesforce app, contract line items can be edited and deleted, but not created.



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. In Lightning Experience, you can add or edit multiple line items at once.

1. In the Contract Line Items related list, click **Add Line Item** (if you're using Salesforce Classic) or **Add Line Items** (if you're using Lightning Experience).
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 each 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**. A contract line item is created for each product you selected.



Tip: To customize the fields that appear in the mass-create and mass-edit windows in Lightning Experience, update the search page layout for price book entries and the multi-line page layout for contract line items in Setup.

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.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add contract line items to service contracts:

- Edit on service contracts
AND
Create on contract line items and Read on products and price books

To view contract line items:

- Read on contract line items AND Read on products and price books

To edit contract line items:

- Edit on contract line items AND Read on products and price books

To delete contract line items:

- Delete on contract line items AND Read on products and price books

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](#)

[Entitlements: Terms to Know](#)

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)

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Field	Description
Parent Contract Line Item	<p>The contract line item's parent line item, if it has one.</p> <p> Tip: View, create, and delete a contract line item's child line items in the Child Contract Line Items related list.</p>
Product	The name of the contract line item (product) as listed in the price book.
Quantity	<p>Number of units of the contract line item (product) included in the service contract.</p> <p>The value must be 1 or greater.</p>
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	<p>Price to use for the contract line item.</p> <p>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.</p>
Service Contract	The service contract associated with the contract line item.
Start Date	<p>Start date of the contract line item.</p> <p>This field is blank unless you set up an Apex trigger or quick action to populate it.</p>
Status	<p>The status of the contract line item.</p> <p>Status is determined by your organization's current system date and the contract line item's <code>Start Date</code> and <code>End Date</code>. The status is:</p> <ul style="list-style-type: none"> • Active if the system date is equal to or later than the <code>Start Date</code> and equal to or earlier than the <code>End Date</code>. • Expired if the system date is later than the <code>End Date</code>. • Inactive if the system date is earlier than the <code>Start Date</code>.
Status Icon	<p>Represents the contract line item's status with one of the following icons:</p> <ul style="list-style-type: none"> •  Active •  Expired •  Inactive <p> Note: This field isn't available in Lightning Experience.</p>
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](#)

Set Up Entitlement Management in Communities

Add entitlement management to your communities to let customers or partners view their entitlements and service contracts. Contract line items don't display in communities.

Follow these steps to expose entitlements and/or service contracts in a community.

- Update user profiles.
 - Clone the Customer Community User, Customer Community Plus User, or Partner Community User profiles and enable the "Read" permission on entitlements and/or service contracts.

 **Note:** Remember to click **Edit Profiles** at the bottom of the detail page to activate the new profiles.
 - Optionally, on the profiles of delegated community moderators, enable the "Create" and "Delete" permissions on entitlement contacts. This lets moderators update entitlement contacts.
 - Verify that the tab visibility for the Entitlements and/or Service Contracts tabs is Default On.
- Add the Entitlements and/or Service Contracts tabs to the community.
- Add the `Entitlement Name` field to case and work order page layouts assigned to community users.

This lets users add entitlements to cases and work orders.

 **Note:** To avoid exposing your internal support processes, we recommend **not** adding the following fields to case and work order page layouts for community users:

- `Entitlement Process Start Time`
- `Entitlement Process End Time`
- `Stopped`
- `Stopped Since`

- Optionally, add the Entitlements related list to account and contact page layouts assigned to community moderators. This lets moderators create cases automatically associated with the right entitlements.

EDITIONS

Available in: Salesforce Classic

Communities are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Entitlement Management is available in **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To create, customize, or activate a community:

- Create and Set Up Communities AND is a member of the community they're updating

To set up entitlement management:

- Manage Entitlements

To assign user licenses:

- Manage Internal Users

Set Up and Manage Assets

Keep tabs on the products that your customers buy. Assets represent purchased or installed products, and are an essential piece of the Salesforce puzzle. You can link assets to maintenance plans, entitlements, work orders, and more so your support team can quickly assess the history of a customer's product.

IN THIS SECTION:

[Assets](#)

While products represent the items that your company sells, assets represent the specific products your customers have purchased. Use assets to store information about your customers' products.

[Set Up Assets](#)

To start tracking the products you sell to customers, customize asset page layouts, edit object permissions, and set up asset sharing.

[Considerations for Using Assets](#)

If you're working with assets, review these considerations to keep things running smoothly.

[Relationships Between Assets](#)

Some assets settle down and have child assets, while others fly solo. Assets can also be linked through replacements and upgrades. Learn how assets can be related to each other, and how (and why) to track those relationships in Salesforce.

[Asset Fields](#)

Assets and asset relationships have the following fields. Depending on your page layout and field security settings, some fields may not be visible or editable.

Assets

While products represent the items that your company sells, assets represent the specific products your customers have purchased. Use assets to store information about your customers' products.

Assets have a serial number, purchase date, and other information related to an individual sale. Depending on how your organization uses assets, they can represent competitor products that your customers have or versions of your products.

View and manage assets from the Assets tab. Depending on your page layout settings, you can also view lists of related assets on account, contact, product, and location page layouts.

You can create asset hierarchies to represent products with multiple components, and view a tree grid of an asset's hierarchy on its detail page. On the support side, assets can be linked to cases, work orders, maintenance plans, entitlements, and contract line items, making it easy to see an asset's history from production to retirement.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Set Up Assets

To start tracking the products you sell to customers, customize asset page layouts, edit object permissions, and set up asset sharing.

IN THIS SECTION:

1. [Configure Asset Settings](#)
Customize your page layouts and object permissions to control how your users work with assets.
2. [Create Assets](#)
Create assets to track products purchased by your customers.
3. [Create Asset Sharing Rules](#)
Asset sharing rules can be based on the record owner or on other criteria, including record type and certain field values.

Configure Asset Settings

Customize your page layouts and object permissions to control how your users work with assets.

1. Make the Assets tab visible to your users.
Users create and manage assets from this tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.
2. Add the Assets related list to record page layouts. It's available on page layouts for the following objects:
 - Accounts
 - Contacts
 - Products
 - Locations (available only if Field Service Lightning is enabled)
3. Customize user permissions. By default, standard users have Read, Create, Edit, and Delete permissions on assets.

Users Who Will...	Need These Permissions
View assets and the Assets tab	Read on assets
Create assets	Create on assets
Update assets	Edit on assets
Delete assets	Delete on assets

4. Customize page layouts.
 - a. If you want to be able to make one asset a child of another asset, add the Parent Asset field and Child Assets related list to asset page layouts. To give users more context, add the read-only Root Asset field, which lists the top-level asset in an asset hierarchy.
 - b. Control which related lists appear on asset detail pages. You may want to add the following related lists:
 - Cases: Cases tracking issues with the asset.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

- Child Assets: The asset's child assets.
-  **Tip:** If an asset is part of a hierarchy of 500 or fewer assets, click **View Asset Hierarchy** on the asset's detail page to view an expandable tree grid of the hierarchy.
- Contract Line Items: Contract line items associated with the asset. Available only if entitlement management is enabled.
 - Entitlements: Entitlements associated with the asset, which indicate the level of customer service its owner is entitled to. Available only if entitlement management is enabled.
 - Locations: Locations associated with the asset, such as warehouses. Available only if Field Service Lightning is enabled.
 - Maintenance Plans: Maintenance plans tracking periodic maintenance performed on the asset. Available only if Field Service Lightning is enabled.
 - Primary Assets: Assets that replaced the current asset (for example, if the current asset required maintenance or was an older model).
 - Related Assets: Assets that were replaced by the current asset.
 - Work Orders: Work orders tracking work performed on the asset.
 - Work Order Line Items: Work order line items tracking work performed on the asset.
- c. Update your asset page layouts to let view a tree grid of an asset hierarchy in Lightning Experience. In the page layout editor, select **Mobile & Lightning Actions**, then drag the **View Asset Hierarchy** action onto the layout.

SEE ALSO:

[Asset Fields](#)

Create Assets

Create assets to track products purchased by your customers.

1. Click **New** on the Assets home page or on the Assets related list on a record.
2. Select a product.
3. Enter a name for the asset.

If you're using Salesforce Classic, you can opt to leave this field blank. When you save the asset, the Asset Name field auto-populates to reflect the product name.

4. Select an account, contact, or both to indicate who has purchased the asset (required).



Note:

- You can enter person accounts in either the Account or Contact fields of an asset. The Assets related list on a person account includes all assets related to the person account, including those where the person account is in the Contact field.
- If you enter an account and a contact that aren't related, the contact's account won't list the asset in its Assets related list.

5. Optionally, select a parent asset. Creating hierarchical relationships between assets lets you link work order line items to child assets and represent complex products.
6. If the asset is a competitor's product, select **Competitor Asset**. If it is produced or used internally, select **Internal Asset**.
7. Fill out the remaining [fields](#) according to your needs.
8. Save your changes.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create assets:

- Create on assets

 **Note:** If you have read-only access to an asset field and you clone an asset, that field is blank on the cloned asset.

SEE ALSO:

[Asset Fields](#)

[Relationships Between Assets](#)

Create Asset Sharing Rules

Asset sharing rules can be based on the record owner or on other criteria, including record type and certain field values.

You can define up to 300 asset sharing rules, including up to 50 criteria-based sharing rules.

1. If you plan to include public groups in your sharing rule, confirm that the appropriate groups have been created.
2. From Setup, enter *Sharing Settings* in the *Quick Find* box, then select **Sharing Settings**.
3. In the Asset Sharing Rules related list, click **New**.
4. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.
5. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
6. Select a rule type.
7. Depending on the rule type you selected, do the following:
 - **Based on record owner**—In the *owned by members of* line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).
 - **Based on criteria**—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.
8. In the *Share with* line, specify the users who should have access to the data: select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
9. Select a setting for *Asset Access*.
10. In the remaining fields, select the access settings for the records associated with the shared assets.

 **Note:** To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create sharing rules:

- **Manage Sharing**

Access Setting

Controlled by Parent

Description

Users can view, edit, or delete an asset based on whether he or she can perform that same action on the parent object associated with the Asset object. Controlled by Parent is the default access setting.

Access Setting	Description
Private (available for associated contacts, opportunities, and cases only)	Users can't view or update records, unless access is granted outside of this sharing rule.
Read Only	Users can view, but not update, records.
Read/Write	Users can view and update records.

11. Click **Save**.

Considerations for Using Assets

If you're working with assets, review these considerations to keep things running smoothly.

Deleting Assets

- Deleting a product does not delete any asset records associated with it.
- Deleting an account or contact deletes all associated assets. If you delete an account with a related contact that is associated with an asset, all three records are deleted. Restoring the account restores all three records.
- Assets associated with cases can't be deleted. This means accounts or contacts that are associated with an asset listed on a case also can't be deleted.
- If you delete an asset with both a parent asset and child assets, its parent and children are no longer linked in an asset hierarchy.

Viewing Asset Hierarchies

- The asset hierarchy view isn't searchable or editable.
- The asset hierarchy view isn't available in communities, Salesforce mobile web, Salesforce for iOS, Salesforce for Android, or the Field Service Lightning mobile app.
- The **View Asset Hierarchy** action appears only on assets that are part of a hierarchy, and is available only for hierarchies of 500 or fewer assets. If a hierarchy contains more than 500 assets, you can still refer to each asset's Child Assets related list and `Parent Asset`, `Root Asset`, and `Asset Level` fields.

Relationships Between Assets

Some assets settle down and have child assets, while others fly solo. Assets can also be linked through replacements and upgrades. Learn how assets can be related to each other, and how (and why) to track those relationships in Salesforce.

IN THIS SECTION:

[Asset Hierarchies](#)

Create parent-child relationships between assets to represent products with multiple components.

[Asset Replacements](#)

When a customer's asset needs to be replaced or upgraded, track the replacement in Salesforce on asset detail pages.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Asset Hierarchies

Create parent-child relationships between assets to represent products with multiple components.

For example, perhaps your business sells a tent which is tracked as an asset, but the tent poles (which customers have a tendency to misplace) are tracked as a separate asset. You can make the tent poles asset a child of the tent asset.

To create hierarchical relationships between assets, use the Parent Asset field and the Child Assets related list on asset detail pages. Assets also come with a few additional fields related to hierarchies:

- The read-only Root Asset field lists the top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root might be the same as its parent. If an asset is at the top of a hierarchy, it is its own root asset, and the Parent Asset field is blank.
- The read-only Asset Level field is a number that reflects the asset's position in a hierarchy. If the asset has no parent or child assets, its level is 1. Assets that belong to a hierarchy have a level of 1 for the root asset, 2 for the child assets of the root asset, 3 for their children, and so forth.

An asset hierarchy can have up to 10,000 assets. Here are some ways to use hierarchical assets to improve your support process.

- When creating a work order to repair a broken asset, create line items on the work order that correspond to specific child assets.
- For situations where a work order is created from an asset, set up a workflow rule or process that creates a work order line item for each child asset.
- Set up a trigger that notifies the owner of an asset by email when the install date for one of the asset's child assets was more than five years before the current date.

 **Note:** The Parent Asset and Root Asset fields aren't available in standard reports that include assets. However, you can reference them in custom reports.

Viewing Asset Hierarchies

To view an expanded tree grid of all assets in an asset's hierarchy, click **View Asset Hierarchy** in the drop-down action menu on any asset detail page in Lightning Experience. (That's in the top right-hand corner of the page.) The action is also available on assets in the console. This view gives field service workers a way to quickly identify parts, assess bills of materials, and understand how assets are related to each other.

Click the caret next to each asset name (1) to collapse and expand a node. You can go up to 20 levels deep in a hierarchy. The asset whose hierarchy you're viewing is shown with a CURRENT stamp (2).

 **Note:** The fields that appear in the hierarchy aren't customizable. If you don't see the action, add it to your asset page layouts: In the layout editor, select **Mobile & Lightning Actions**, then drag it onto your page layout.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

ASSET	STATUS	PRODUCT SKU	PRODUCT CODE	SERIAL NUMBER	LAST MODIFIED DATE	LAST MODIFIED BY	INSTALL DATE
 BMW 528i CURRENT 	Registered			BM542333C	07/10/2017	Admin User	07/07/2015
 Engine Compartment	Installed			BM222337	08/01/2017	Admin User	07/07/2015
 Twin Turbo V4 Engine	Registered			BM2V4EA223426L	07/04/2017	Admin User	07/07/2015
Spark Plug 24A	Installed			BM5P24A	07/04/2017	Admin User	07/10/2016
Radiator 65M	Installed			BMRA65M23332	07/04/2017	Admin User	06/14/2017
Battery					07/10/2017	Admin User	
 Cabin	Installed				08/01/2017	Admin User	07/07/2015
 Passenger's Seat	Installed			BMP5	07/04/2017	Admin User	07/07/2015
Leather 34A	Installed				07/04/2017	Admin User	07/07/2015
 Driver's Seat3	Installed			BMD5	07/10/2017	Admin User	07/07/2015
Leather 34A	Installed			BML34A	07/10/2017	Admin User	07/07/2015
 Dashboard	Installed			BMDB	07/04/2017	Admin User	07/07/2015

The **View Asset Hierarchy** action is available only for hierarchies of 500 or fewer assets. If a hierarchy contains more than 500 assets, you can still refer to each asset's Child Assets related list and Parent Asset, Root Asset, and Asset Level fields.

Here's what happens if you don't have access to certain elements of an asset hierarchy:

- If your field-level security settings prohibit you from accessing a particular field in the asset hierarchy view, you can see the field name in the column title, but the column is blank.
- If sharing settings prohibit you from viewing an asset that's lower in the current asset's hierarchy, the restricted asset doesn't appear in the hierarchy view for you.
- If sharing settings prohibit you from viewing an asset that's higher in the current asset's hierarchy, an error appears and you can't view the asset hierarchy. This is because record sharing settings also apply to child records.

The asset hierarchy view isn't searchable or editable. It isn't available in Salesforce Classic, communities, Salesforce mobile web, Salesforce for iOS, Salesforce for Android, or the Field Service Lightning mobile app.

Asset Replacements

When a customer's asset needs to be replaced or upgraded, track the replacement in Salesforce on asset detail pages.

You can view and manage asset replacements from two related lists on asset detail pages.

- The Primary Assets related list shows assets that replaced the current asset.
- The Related Assets related list shows assets that the current asset replaced.

For example, suppose an elevator's door is tracked as an asset named Door Model 1. Your customer decides to install a newer door, and Door Model 1 is replaced with Door Model 2. To track this replacement:

1. Navigate to the Door Model 1 record.
2. In the Primary Assets related list, click **New Asset Relationship**.
3. In the Asset field, select **Door Model 2**. The Related Asset field auto-populates to list Door Model 1.
4. Select a relationship type. This field comes with three options—Replacement, Upgrade, and Crossgrade—but you can define more in Setup.
5. If Door Model 2 will only be installed for a certain amount of time—for example, if it's being leased—enter a From and To date to indicate when it will be in use.
6. Save your changes.

This asset relationship now appears in the Primary Assets related list on the Door Model 1 record, and the Related Assets related list on the Door Model 2 record. (You can get the same results by creating the asset relationship record from the Related Assets related list on the Door Model 2 record.)

If Door Model 2 is replaced by Door Model 3 down the road, keep in mind that Door Model 3 won't appear in either related list on the Door Model 1 asset record.

 **Tip:** Customize fields, page layouts, and more for asset relationships from the Asset Relationships page in Setup.

To save your team time and ensure that asset replacements are adequately tracked, create a visual flow to automate asset replacements. For example, the flow could be launched in the Field Service Lightning mobile app by an on-site technician when an asset is being replaced.

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Asset Fields

Assets and asset relationships have the following fields. Depending on your page layout and field security settings, some fields may not be visible or editable.

Asset

Field Name	Description
Account	Account associated with the asset. Each asset must be associated with an account or contact.
Asset Division	Division to which the asset belongs. This value is automatically inherited from the related account if any. Otherwise the value is inherited from the related contact. Available only in organizations that use divisions to segment their data.
Asset Level	<p>(Read Only) The asset's position in an asset hierarchy. If the asset has no parent or child assets, its level is 1. Assets that belong to a hierarchy have a level of 1 for the root asset, 2 for the child assets of the root asset, 3 for their children, and so forth.</p> <p> Note: On assets created before Summer '17 that are part of an asset hierarchy, the asset level defaults to -1. Once the asset record is updated, the asset level is calculated and automatically updated.</p>
Asset Name	<p>Identifying name for the asset.</p> <p> Note: In Salesforce Classic, if you select a product from the product lookup and leave the asset name blank, the name auto-populates to reflect the product name when the record is saved.</p>
Asset Owner	Individual user to which the asset is assigned. By default, the asset owner is the user who created the asset record.
Asset Provided By	The account that provided the asset, typically a manufacturer.
Asset Serviced By	The account in charge of servicing the asset.
Competitor Asset	Indicates whether the asset represents a competitor's product. This checkbox helps you

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

Field Name	Description
	track which customers are using your competitor's products.
Contact	Contact associated with the asset. Each asset must be associated with an account or contact. If you choose both an account and contact, they don't need to be related to each other. Contacts that are not associated with an account cannot be linked to assets.  Note: If the Contact field lists a person account, the asset doesn't appear in the account's Assets related list.
Description	Description of the asset.
Install Date	Date the asset was installed.
Internal Asset	Indicates that the asset is produced or used internally.
Location	The asset's location. Typically, this is the place where the asset is stored, such as a warehouse or van.
Parent Asset	The asset's parent asset.  Tip: View, create, and delete an asset's child assets in the Child Assets related list. To view a tree grid of an asset hierarchy in Lightning Experience, click View Asset Hierarchy from the action drop-down menu on an asset detail page.
Price	Amount the customer paid for the asset.
Product	The product on which the asset is based.
Product Code	The internal code or product number used to identify the related product.
Product Description	The description of the related product.
Product Family	The related product's category.
Product SKU	The SKU of the related product.
Purchase Date	Date the customer bought the asset.
Quantity	The number of assets purchased.
Root Asset	(Read Only) The top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root might be the same as its parent.
Serial Number	The model number on the asset.
Status	The asset's status. This picklist contains the following values, which can be customized: <ul style="list-style-type: none"> • Purchased • Shipped

Field Name	Description
	<ul style="list-style-type: none"> • Installed • Registered • Obsolete
Usage End Date	The date the asset expires or the last date it is under warranty. Use this field to store whatever date is appropriate for your business.

Asset Relationship

Asset relationships represent non-hierarchical relationships between assets due to replacements, upgrades, or other circumstances. Relationships appear in the Primary Assets and Related Assets related lists on asset records.

Field Name	Description
Asset	The replacement asset.
Asset Relationship Number	An autogenerated number identifying the asset relationship.
From Date	The day the replacement asset is installed.
Related Asset	The asset being replaced.
Relationship Type	The type of relationship between the assets. This field comes with three options—Replacement, Upgrade, and Crossgrade—but you can create more in Setup.
To Date	The day the replacement asset is uninstalled.

SEE ALSO:

- [Set Up Assets](#)
- [Relationships Between Assets](#)
- [Considerations for Using Assets](#)

Set Up Routing with Omni-Channel

Omni-Channel routes work requests to the most available and qualified support agents in the console. You can also provide real-time operational intelligence to support supervisors with Omni-Channel Supervisor.

IN THIS SECTION:

[Omni-Channel for Administrators](#)

Route any type of incoming work item to the most qualified, available support agents in your call center. Omni-Channel integrates seamlessly into the console in both Salesforce Classic and Lightning Experience.

[Omni-Channel Supervisor](#)

Access real-time operational intelligence with Omni-Channel Supervisor.

Omni-Channel for Administrators

Route any type of incoming work item to the most qualified, available support agents in your call center. Omni-Channel integrates seamlessly into the console in both Salesforce Classic and Lightning Experience.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

To modify permission sets and profiles:

- Manage Profiles and Permission Sets

Omni-Channel is a flexible, customizable feature, and you can configure it declaratively—that is, without writing code. Use Omni-Channel to manage the priority of work items, which makes it a cinch to route important work items to agents quickly. Manage your agents' capacity to take on work items so that they're given only the number of assignments that they can handle. You can also define which agents can work on different types of assignments. For example, you can create one group of agents to respond to leads and sales inquiries, and another group that helps customers with support questions.

Best of all, Omni-Channel routes all these assignments to the correct agents automatically. Agents no longer have to pick and choose work assignments manually from a queue, which saves everyone in your call center time, effort, and brainpower. Because it's easier for agents to work on their assignments, they can assist your customers faster and more effectively and close assignments more quickly.

Let's get started!

IN THIS SECTION:

[Set Up Omni-Channel with a Guided Setup Flow](#)

Get ready to route cases with Omni-Channel in Lightning Experience with a quick guided setup flow. Create a queue and routing configuration, select your support agents, and add Omni-Channel to the utility bar in your default Lightning Service Console app.

[Customize Omni-Channel](#)

The first step towards getting your Omni-Channel implementation up and running is to create the necessary objects in Salesforce.

[Set Access to Presence Statuses](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Once you've created your Presence Statuses for Omni-Channel, you need to set up how your users will access them. You can set access through permission sets or profiles.

[Add the Omni-Channel Widget to the Salesforce Console](#)

After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce console so that your agents can start receiving work.

[Add the Omni-Channel Utility to a Lightning Console App](#)

Add the Omni-Channel utility to your Lightning Service console to route work to agents in a flash.

[Test Your Omni-Channel Implementation](#)

Now that you've got Omni-Channel set up and enabled, test your implementation to make sure it's working correctly.

[Use Omni-Channel with Your Existing Live Agent Implementation](#)

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Skills-Based Routing for Omni-Channel

Your agents have different skills sets and abilities. Your customers have different needs. Skills-based routing lets your contact center route work to the best agent for the job, so that customer work items are assigned to the agent who is best able to solve the issue. Skills-based routing improves the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

Use External Routing for Omni-Channel

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs. External routing is supported with Omni-Channel in both Salesforce Classic and Lightning Experience.

Omni-Channel Reference

Understand how Omni-Channel routing works and reference the fields for agent work records and user presence records.

Set Up Omni-Channel with a Guided Setup Flow

Get ready to route cases with Omni-Channel in Lightning Experience with a quick guided setup flow. Create a queue and routing configuration, select your support agents, and add Omni-Channel to the utility bar in your default Lightning Service Console app.

The Omni-Channel setup flow is the fastest and easiest way to get up and running with case routing in Lightning Experience. When you complete the flow, Omni-Channel is ready to use in the default Lightning Service Console app. Cases are routed to your support agents using your shiny new queue and routing configuration.

 **Note:** This setup flow sets up queue-based routing for Omni-Channel, not skills-based routing. You must set up skills-based routing manually.

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking  and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Enabling Omni-Channel
- Creating a queue to hold incoming cases until they're routed to an agent
- Creating a routing configuration and a presence configuration, which work in tandem to control your agents' workload and set the priority for work in your queue
- Selecting the users who can receive work requests
- Setting agent capacity and the work item size for cases that come in through your new queue

 **Note:** We name a few of these objects for you. The presence configuration name is based on what you entered as the name for the group of agents you created. If you didn't have a routing configuration already, we gave it the same name as your queue. You can change these names in your Omni-Channel settings in Setup.

We turn on several things in the background during the setup flow.

Enable Omni-Channel

If it isn't enabled already, we turn on Omni-Channel.

Create a Service Channel for Cases

Service channels let you choose which objects you want to route in Omni-Channel. We create one for cases to get you started.

Create Presence Statuses

Presence statuses are what agents use to go online in Omni-Channel. We create three presence statuses for your agents to use: Available, On Break, and Busy. The Available status makes the agent available only to accept cases.

Create and Assign a Permission Set with Presence Statuses Assigned to Users

To make sure that your agents have access to the presence statuses we create, we make a permission set that assigns the presence statuses to the users you select in the setup flow. The permission set is called Omni Setup Flow (with developer name `Omni_Setup_Flow`).

Add the Omni-Channel Utility to Your Console

We add the Omni-Channel utility to the default Lightning Service Console app.

IN THIS SECTION:

[Omni-Channel Setup Flow: What's Next?](#)

Learn where you can customize and view what you set up during the Omni-Channel setup flow.

SEE ALSO:

[Get Started with Service Setup](#)

[Omni-Channel Utility for Lightning Console Apps](#)

Omni-Channel Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Omni-Channel setup flow.

After completing the setup flow, you have an Omni-Channel queue with agents assigned and ready to get to work!

Get Work into Your New Queue

Set up automatic assignment for cases so incoming work goes straight to your queue, where it's routed to an agent. Head on over to Process Builder to set criteria for your incoming cases.

Make More Queues

If you want to create more queues to cover different support tier levels or work priorities, for example, then run through the setup flow again. And again, and again...

Test it Out

We added Omni-Channel to the utility bar in your default Lightning Service Console app, so when you're ready, hop into your console to test out your implementation as a support agent. Simply log in, create a case, change the case owner to your new queue, and watch the case appear as a work request in the utility.



Note: If you didn't add yourself as an agent during the setup flow, you can add yourself to the permission set we created for you.

Customize Omni-Channel

To route other objects like chats and leads, go to Setup and enter `Omni-Channel` in the `Quick Find` box. Then, select **Service Channels**.

You can create statuses that make the agent available for one or more work types at a time. For example, you can have a presence status that makes the agents available for cases and another for cases and chats. To create and edit presence statuses, go to Setup and enter *Omni-Channel* in the **Quick Find** box. Then, select **Presence Statuses**. To assign presence statuses to you and your team, you can use permission sets or profiles.

You can also add Omni-Channel to any console app. Simply edit or create a console app in the App Manager in Setup, or in your app settings in Salesforce Classic Setup.

Hit the Trails with Trailhead

Don't forget to check out more awesome Omni-Channel features like Omni-Channel Supervisor, decline reasons, and push timeout in the [Omni-Channel Basics](#) module on Trailhead.

SEE ALSO:

[Trailhead: Omni-Channel Basics](#)

[Test Your Omni-Channel Implementation](#)

[Give Users Access to Presence Statuses with Profiles](#)

Customize Omni-Channel

The first step towards getting your Omni-Channel implementation up and running is to create the necessary objects in Salesforce.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Enable Omni-Channel](#)

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

[Create Service Channels](#)

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

[Create Routing Configurations](#)

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

[Associate Routing Configurations and Agents with Queues](#)

Queues are a classic element of Salesforce that help your teams manage leads, cases, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

[Create Presence Configurations](#)

Let's focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

[Create Presence Statuses](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- **Customize Application**

1. From Setup, enter *Omni-Channel Settings* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.
3. Click **Save**.

Create Service Channels

Service channels let you turn nearly any Salesforce object such as a case, lead, SOS session, or even a custom object into a work record. Omni-Channel then plucks these work items from their queues like flowers from the garden of agent productivity and routes them to your agents in real time.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- **Customize Application**

Service channels let you manage sources of work and their priority compared to other work items. After you create service channels, you'll associate them with queues, which determine how work items are routed to your agents. You can create service channels for support channels, such as cases or SOS calls, or for sales channels, such as leads.

1. From Setup in Salesforce Classic, enter *Service Channels* in the Quick Find box, select **Service Channels**, then click **New**.
2. Specify the settings for your service channel.
3. Click **Save**.

IN THIS SECTION:

[Service Channel Settings](#)

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

[Supported Objects for Omni-Channel](#)

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Service Channel Settings

Customize your service channel settings to define how your organization receives work from various sources, such as chat, email, SOS calls, or social channels.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited, and Developer** Editions

Setting	What It Does
Service Channel Name	Names the service channel. This service channel name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the service channel.
Salesforce Object	The type of Salesforce standard or custom object that's associated with this service channel. For example, if you have a service channel for Web cases set the Related Object Type to <i>Case</i> . For a complete list of objects that service channels support, see Supported Objects for Omni-Channel .
Custom Console Footer Component	(Optional) Opens the specified custom console footer component when an agent accepts a work item request. For example, open a marketing campaign widget when an agent accepts a lead.

Supported Objects for Omni-Channel

Omni-Channel turbocharges your agents' productivity by assigning records to them in real time. But which objects and records does Omni-Channel support?

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited, and Developer** Editions

Omni-Channel currently supports routing for the following objects and records.

- Cases
- Chats
- SOS video calls
- Social posts
- Orders
- Leads
- Custom objects that don't have a master object

Lightning Omni-Channel Routing (Beta) doesn't support routing for the following objects and records.

- SOS video calls

Create Routing Configurations

Routing configurations determine how work items are routed to agents. Use them to prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. To start routing work items to agents, create routing configurations and assign them to queues.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- **Customize Application**

Create a routing configuration for each service channel in your organization. After you create routing configurations, associate them with queues so your agents can receive work after we get Omni-Channel set up.

1. From Setup in Salesforce Classic, enter *Routing* in the Quick Find box, select **Routing Configurations**, then click **New**.
2. Specify the settings for your routing configuration.
3. Click **Save**.

IN THIS SECTION:

[Routing Configuration Settings](#)

Customize your routing configuration settings to define how work items are pushed to agents.

[Omni-Channel Routing Model Options](#)

Specify how incoming work items are directed to agents using Omni-Channel.

Routing Configuration Settings

Customize your routing configuration settings to define how work items are pushed to agents.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

Basic Information

Setting	What It Does
Routing Configuration Name	Names the service routing configuration. This routing configuration name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for the service channel.
Overflow Assignee	Sets the user or queue that Omni-Channel routes items to when your org reaches Omni-Channel limits. Ensure that you: <ul style="list-style-type: none"> • Select a user or queue that has access to the objects that the queue(s) using this routing configuration handles

Setting	What It Does
	<ul style="list-style-type: none"> Assign a routing configuration with an overflow assignee to all Omni-Channel queues involved in a bulk operation, such as changing the status or owner for multiple requests

Routing Settings

Setting	What It Does
Routing Priority	<p>The order in which work items from the queue that are associated with this routing configuration are routed to agents. Objects in queues with a lower number are routed to agents first.</p> <p>For example, if you set the priority for highly qualified leads to <i>1</i> and the priority for less qualified leads to <i>2</i>, highly qualified leads are routed and assigned to agents before less qualified leads.</p> <p>On the backend, we identify agents with available capacity; then we assign work to them based on this priority order:</p> <ol style="list-style-type: none"> The priority of the queue from which the work item came The amount of time that the work item has been waiting in the queue Members of the queue who are available to receive new work items from the queue <p>When the work item is assigned to an agent, the owner of the object changes from the queue to the agent. If an agent declines the work item, we reassign it back to the queue with its original age so that it can be properly rerouted.</p>
Routing Model	Determines how incoming work items are routed to agents who are assigned to the configuration's service channel.
Push Time-Out (seconds)	Sets a time limit for an agent to respond to an item before it's pushed to another agent.

Work Item Size

Setting	What It Does
Units of Capacity	<p>Indicates the amount of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration.</p> <p>The <code>Capacity</code> setting in the presence configuration the agent is assigned to determines the agent's overall capacity. When the agent is assigned a work item from the queue that's associated with this configuration, the <code>Capacity Weight</code> is subtracted</p>

Setting	What It Does
	<p>from the agent's overall capacity. Agents can be assigned work items until their overall capacity reaches 0.</p> <p>You can select a <code>Capacity Weight</code> or a <code>Capacity Percentage</code>, but not both.</p>
Percentage of Capacity	<p>The percentage of an agent's overall capacity that's consumed when the agent is assigned a work item from queues that are associated with this configuration.</p> <p>The agent's overall capacity is determined by the <code>Capacity</code> setting in the presence configuration that the agent is assigned to. When the agent is assigned a work item from the queue that's associated with this configuration, the <code>Capacity Percentage</code> is deducted from the agent's overall capacity until the agent has 0% capacity remaining.</p> <p>You can select a <code>Capacity Weight</code> or a <code>Capacity Percentage</code>, but not both.</p>

Omni-Channel Routing Model Options

Specify how incoming work items are directed to agents using Omni-Channel.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

In Omni-Channel, work items are automatically routed or "pushed" to agents who are assigned to the appropriate queue.

Routing Option	Description	Example
Least Active	Incoming work items are routed to the agent with the least amount of open work. When work items all consume 1 capacity, the agent with the lowest number of work items receives incoming work. The example presents a scenario in which agents have work with varying capacity impacts.	<ul style="list-style-type: none"> Agent A and Agent B each have an overall capacity of 5. Agent A has 3 active work items with capacity impact of 1. Agent B has 1 active work item with capacity impact of 4. Because Agent A has a lower capacity impact than Agent B, incoming work items are routed to Agent A.
Most Available	Incoming work items are routed to the agent with the greatest difference between work item capacity and open work items. Capacity is determined by the presence configuration that the agent is assigned to.	<ul style="list-style-type: none"> Agent A and Agent B each have an overall capacity of 5. Agent A has 3 active work items while Agent B has 1.

Routing Option	Description	Example
		<ul style="list-style-type: none"> Because Agent B has the most open capacity, incoming work items are routed to Agent B.

Associate Routing Configurations and Agents with Queues

Queues are a classic element of Salesforce that help your teams manage leads, cases, and custom objects. Omni-Channel supercharges your queues to be able to route work items to your agents in real time. Agents don't have to select work items manually from queues because Omni-Channel routes work items to agents automatically and in real time!

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

The work items in the queue are assigned the priority that you specified in the routing configuration that you created earlier. If your organization already uses them, you can reuse queues that are available in your organization. That way, you can route work items in real time to the agents who are assigned to those queues.

If your organization doesn't use queues, create at least one queue to integrate with Omni-Channel. You can also create multiple queues to handle the different types of work items. For example, you might create one queue for incoming cases and another queue for incoming leads.

 **Note:** Omni-Channel doesn't limit the number of queues that you can use. However, you can only modify (insert, update, or delete) up to 16 queues in a single batch.

For routing to work correctly, assign each of your agents to the queue from which they are receiving work items.

For more information about queues, see "Queues Overview" in the Salesforce Help.

1. In Setup, enter `Queues` in the Quick Find box, then select **Queues**.
2. Create a queue or edit an existing one.
3. In the `Routing Configuration` field, look up the routing configuration that you want to associate with the queue.
4. In the Queue Members section, add agents to the `Selected Users` field.
These agents will receive work items from this queue.
5. Click **Save**.

Create Presence Configurations

Let's focus on agents for a minute. Presence configurations determine how much work agents can take on and what Omni-Channel behaviors they can access while they assist customers. Your organization can have multiple configurations for different groups of agents who support different channels.

Available in: Salesforce Classic, Lightning Experience

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

When you enable Omni-Channel in your organization, Salesforce creates a presence configuration for you, called the Default Presence Configuration. All your agents are assigned to that configuration automatically. However, you can create a presence configuration and assign individual agents to it to customize Omni-Channel settings for a subset of your agents. If you reassign agents to a custom presence configuration, they're excluded from the Default Presence Configuration.

1. From Setup in Salesforce Classic, enter `presence` in the Quick Find box, select **Presence Configurations**, then click **New**.
2. Choose the settings for your presence configuration.
3. Click **Save**.

IN THIS SECTION:

[Presence Configuration Settings](#)

Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Presence Configuration Settings

Customize your presence configuration settings to define the Omni-Channel settings that are assigned to agents.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

Basic Information

These settings configure the basic functionality that's available to agents when they're signed in to Omni-Channel.

Setting	What It Does
Presence Configuration Name	Names the presence configuration. This configuration name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for the configuration.
Capacity	Determines the agent's maximum capacity for work. The size of the work item that you specified in the routing configuration consumes the agent's capacity.
Automatically Accept Requests	Automatically accepts work assignments that are pushed to an agent. These work items open automatically in the agent's workspace, so the agent doesn't have to accept these work items manually from the Omni-Channel footer component (or the utility in Lightning Experience). If <code>Allow Agents to Decline Requests</code> is enabled, you can't use this setting.

Setting	What It Does
Allow Agents to Decline Requests	Allows agents to decline incoming work items. If <code>Automatically Accept Requests</code> is enabled, agents can't decline requests.
Update Status on Decline	Automatically changes the agent's status to the status that you specify when the agent declines a work item. This setting is available only if <code>Allow Agents to Decline Requests</code> is enabled.
Allow Agents to Choose a Decline Reason	Allows agents to choose a reason when declining work assignments. This setting is available only if <code>Allow Agents to Decline Requests</code> is enabled.
Update Status on Push Time-Out	Automatically changes the agent's status when a work assignment that's been pushed to them times out. This setting is available only if <code>Push Time-Out</code> is enabled.
Request Sound Enabled	Plays a sound in the agent's widget when a work request is received.
Disconnect Sound Enabled	Plays a sound in the agent's widget when the agent loses connection with Omni-Channel.

Assign Decline Reasons

These settings appear when `Allow Agents to Decline Requests` and `Allow Agents to Choose a Decline Reason` are selected.

Setting	What It Does
Available Decline Reasons	Indicates the decline reasons that are eligible to be assigned to the configuration.
Selected Decline Reasons	Indicates the decline reasons that are assigned to the configuration.

Assign Users

Assign eligible users to the configuration to give them access to Omni-Channel functionality. Later, you'll see that you can also assign profiles to a configuration. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.

 **Warning:** Users can be assigned to only one presence configuration at a time. If you assign the same user to a second presence configuration, the system removes that user from the first presence configuration without warning you. So make sure that you know which presence configuration assignment is required for each user!

For example, let's say that User A is assigned to Presence Configuration A. Then, you create Presence Configuration B and assign User A to it without realizing that the user was assigned to another presence configuration. Salesforce removes User A from Presence Configuration A and reassigns the user to Presence Configuration B without notifying you.

Setting	What It Does
Available Users	Indicates the users who are eligible to be assigned to the configuration.
Selected Users	Indicates the users who are assigned to the configuration.

Assign Profiles

Assign eligible profiles to the configuration to give users who are associated with the profiles access to Omni-Channel functionality. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the user's profile.

Setting	What It Does
Available Profiles	Indicates the user profiles that are eligible to be assigned to the configuration.
Selected Profiles	Indicates the user profiles that are assigned to the configuration.

Create Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- **Customize Application**

A presence status can encompass one or more channels of work items. For example, you might create a presence status called "Available for Web Support" that includes service channels for chats and emails. When agents are signed in to that presence status, they can receive incoming chats and emails. Genius!

1. From Setup in Salesforce Classic, enter *presence* in the Quick Find box, select **Presence Statuses**, then click **New**.
2. Choose the settings for your presence status.
3. Click **Save**.

IN THIS SECTION:

[Presence Status Settings](#)

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Presence Status Settings

Customize your presence status settings to define which service channels are assigned to difference statuses. Agents can sign in to Omni-Channel with different statuses depending on the types of work that they're available to receive.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

Basic Information

Use these settings to name your presence status.

Setting	What It Does
Status Name	Names the presence status. This presence status name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the presence status.

Status Options

These settings indicate whether agents are online or busy when they use this status.

Setting	What It Does
Online	Lets agents who use this status receive new work items.
Busy	Lets agents who use this status appear away and indicates that they're unable to receive new work items.

Service Channels

Assign service channels to your presence status. Agents who sign in with this presence status can receive work items from the channels that you select.

Setting	What It Does
Available Channels	Indicates the service channels that are eligible to be assigned to the presence status.
Selected Channels	Indicates the service channels that are assigned to the presence status.

Set Access to Presence Statuses

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Once you've created your Presence Statuses for Omni-Channel, you need to set up how your users will access them. You can set access through permission sets or profiles.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Give Users Access to Presence Statuses with Permission Sets](#)

Make presence statuses available to agents who are assigned to certain permission sets.

[Give Users Access to Presence Statuses with Profiles](#)

Make presence statuses available to agents who are assigned to certain profiles.

Give Users Access to Presence Statuses with Permission Sets

Make presence statuses available to agents who are assigned to certain permission sets.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through permission sets, or alternatively, through profiles.

1. In Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click the name of the permission set to which you want to give access to statuses.
3. Click **Service Presence Statuses Access**.
4. Click **Edit**.
5. Select the presence statuses that you want to associate with the permission set.
Agents who are assigned to this permission set can sign in to Omni-Channel with any of the presence statuses that you make available to them.
6. Click **Save**.

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

To modify permission sets:

- Manage Profiles and Permission Sets

Give Users Access to Presence Statuses with Profiles

Make presence statuses available to agents who are assigned to certain profiles.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. You can give users access to presence statuses through profiles, or alternatively, through permission sets.

1. In Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click the name of the profile to which you want to give access to statuses.
Don't click **Edit** next to the profile name. If you do, you won't see the correct page section where you can enable statuses.
3. In the Enabled Service Presence Status Access section, click **Edit**.
4. Select the presence statuses that you want to associate with the profile.
Agents who are assigned to this profile can sign in to Omni-Channel with any of the presence statuses that you make available to them.
5. Click **Save**.

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

To modify profiles:

- Manage Profiles and Permission Sets

Add the Omni-Channel Widget to the Salesforce Console

After you get Omni-Channel all set up for your organization, it's time to add the Omni-Channel widget to the Salesforce console so that your agents can start receiving work.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

The Omni-Channel widget appears in the bottom right corner of the Salesforce console. From there, agents can change their presence status and triage their incoming work assignments.

 **Note:** If your organization uses Live Agent to manage chats, you can either use the Live Agent widget or the Omni-Channel widget to manage chats, but not both. To learn more about managing Live Agent, see [Use Omni-Channel with Your Existing Live Agent Implementation](#).

1. From Setup, enter *Apps* in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the Omni-Channel widget to.
3. In the Choose Console Components section, add Omni-Channel to your list of selected items.
4. Click **Save**.

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

IN THIS SECTION:

[Control Visible Work Item Details in Omni-Channel with Compact Layouts](#)

Ever wanted to customize the information that your agents see when they get a new work item in Omni-Channel? You can! Just customize primary compact layout for that work item's object.

Control Visible Work Item Details in Omni-Channel with Compact Layouts

Ever wanted to customize the information that your agents see when they get a new work item in Omni-Channel? You can! Just customize primary compact layout for that work item's object.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

If you look closely, you'll notice that a few fields are visible by default on new work item requests. For example, if your agent receives a request to manage a case, the request features the case's priority, status, and case number by default. An object's primary compact layout controls all of the visible fields in the Omni-Channel footer component (or Omni-Channel utility, if you're using Lightning Experience). But what if you want to see more information, such as the case's owner or its subject? Just edit the primary compact layout so that it includes the fields that you want to appear in the widget.

 **Tip:** The Omni-Channel footer component and Omni-Channel utility are, well, compact, so there's only so much room to display fields on work item requests. While you can technically put up to 10 fields on a compact layout, Omni-Channel displays only 4 fields. As a best practice, select up to 4 of the most important fields that you want to expose on work item requests, then add those to your compact layout.

1. Decide which object's compact layout you want to edit.
2. From the management settings for the object whose work item you want to edit, select **Compact Layouts**, and then select **New**. For example, to edit the compact layout for cases, go to the object management settings for cases, select **Compact Layouts**, then select **New**.
3. Select the settings for your compact layout, including the fields that you want it to include. The fields that you pick appear in Omni-Channel when an agent receives a request.
4. Click **Save**.
5. Change the primary compact layout to your new layout by clicking **Compact Layout Assignment > Edit Assignment**.
6. Select your new compact layout from the Primary Compact Layout drop-down list.
7. Click **Save**.

Add the Omni-Channel Utility to a Lightning Console App

Add the Omni-Channel utility to your Lightning Service console to route work to agents in a flash.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

The Omni-Channel utility appears in the utility bar in your Lightning Console app. From there, agents can change their presence status and triage their incoming work assignments.

1. From Setup in Lightning Experience, enter *Apps* in the Quick Find box, then select **App Manager**.
2. Click the dropdown next to the console app you want to add Omni-Channel to, then click **Edit**.
3. Under Utility Bar, click **Add**.
4. Click **Omni-Channel**.
5. Click **Save**.
6. Click **Done**.

Test Your Omni-Channel Implementation

Now that you've got Omni-Channel set up and enabled, test your implementation to make sure it's working correctly.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

To test your implementation, route a work item to yourself in the console.

1. Log in to the console where you added Omni-Channel.
Make sure that you log in as a user who's enabled to use Omni-Channel. For the sake of testing the feature, make sure that you're the only agent who's signed into Omni-Channel.
2. Open Omni-Channel and change your status so that you can receive incoming work items.
3. In the console, navigate to the record that corresponds to the service channel you've set for your current presence status.
For example, if you're logged in with a status that's called "Available for Cases," navigate to a list of your open cases in the console.
4. If you're using Salesforce Classic, select the checkbox next to the record that you want to route to yourself. If you're using Lightning Experience, open the record you want to route to yourself.
5. Click **Change Owner**.
6. Select *Queue*.
7. Enter the name of the queue that you associated with your routing configuration.
8. Click **Submit**.

Sit back and relax. You'll see an incoming request notification in Omni-Channel within a few seconds.

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

So, you've decided to take your customer service to the next level by using Live Agent and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Live Agent is powered by Live Agent Configurations, which control the behaviors and settings that are available to Live Agent users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Live Agent with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats. Whichever way you use Omni-Channel with Live Agent, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Live Agent and Omni-Channel, your Live Agent users also become Omni-Channel users, so your chat agents need to be associated with both a Live Agent Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Live Agent implementation.

For each Live Agent Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Live Agent Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Live Agent Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Live Agent enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Live Agent Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through Omni-Channel in the console. The only difference they see is that they now use Omni-Channel in the console to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel presence statuses are configurable.

If you want to use Live Agent and Omni-Channel in Lightning Experience, you must use Omni-Channel routing for your chats. All you have to do is create a chat button with the routing type Omni and assign your chat agents to queues. Then, add the Omni-Channel utility and Live Chat Transcripts to your Lightning Console app, and you agents can start accepting chat requests.

IN THIS SECTION:

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

There's a lot to keep in mind as you decide whether to try Omni-Channel routing for chats. Omni-Channel routing for chats is enabled when you enable Live Agent for the first time, or when you create a chat button that uses the routing option **Omni**.

Let's compare the two routing model options when using Live Agent and Omni-Channel together.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Agents must chat with customers in the console in Salesforce Classic.	Agents can chat with customers in the console in either Salesforce Classic or Lightning Experience.
Agents use the Omni-Channel widget in Salesforce Classic to handle their work.	Agents use the Omni-Channel widget in Salesforce Classic or the Omni-Channel utility in Lightning Experience to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can't be prioritized with Omni-Channel work, or relative to each other. Un-routed Omni-Channel items are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can be prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni-Channel Supervisor, but they use the Live Agent Supervisor Panel to observe chats and assist agents with their chats. You must create a skill for agents handling chats routed with Omni-Channel to make them visible in the Live Agent Supervisor Panel.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	In Salesforce Classic, you can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats. In Lightning Experience, you can customize Live Chat Transcript pages in the Lightning App Builder.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. They have the option to do this on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Live Agent .	Uses the Console Integration Toolkit Methods for Omni-Channel for Salesforce Classic, or Omni-Channel Objects for the Lightning Console JavaScript API for Lightning Experience.

However, there are a few limitations to using Omni-Channel routing for chats:

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- You can't use chat conferencing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- Chats routed with Omni-Channel can't use supervisor whisper messages and assistance flags with Omni-Channel Supervisor.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This situation occurs because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the next agent accepts the chat.

Skills-Based Routing for Omni-Channel

Your agents have different skills sets and abilities. Your customers have different needs. Skills-based routing lets your contact center route work to the best agent for the job, so that customer work items are assigned to the agent who is best able to solve the issue. Skills-based routing improves the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

Available in: Salesforce Classic and Lightning Experience

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

IN THIS SECTION:

[How Does Skills-Based Routing Work?](#)

Skills-based routing looks at the skills required to complete a work item (requested skills) and matches these skills to the skills that are assigned to the agent (agent's skills). Omni-Channel routes the work to the first agent who has the requested skills and who is available (that is, has the capacity to take the work item).

[How Does Skills-Based Routing Differ from Queue-Based Routing?](#)

Skills-based routing allows work items to be routed using more sophisticated and dynamic criteria than queue-based routing.

[Considerations](#)

Skills-based routing is set up using the Salesforce setup pages and the API. Administrators who are setting up skills-based routing should be familiar with Apex and using the API.

[Skills-Based Routing Limitations](#)

Skills-based routing has the following limitations.

[Set Up Skills-Based Routing](#)

Follow these steps to set up skills-based routing for Omni-Channel in your org.

[Transfer a Work Item to a Different Skill Set](#)

You can transfer a work item, such as a case, to a different skill set, so an agent with the right skills can resolve the issue.

How Does Skills-Based Routing Work?

Skills-based routing looks at the skills required to complete a work item (requested skills) and matches these skills to the skills that are assigned to the agent (agent's skills). Omni-Channel routes the work to the first agent who has the requested skills and who is available (that is, has the capacity to take the work item).

Available in: Salesforce Classic and Lightning Experience

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

Skills-based routing is supported on the following objects: Cases, Leads, Orders, and Custom Objects. We use the term "work items" to refer to the cases, leads, orders, and custom objects that are routed by Omni-Channel.

You can define whatever skills that you need for your company. Skills typically are used to represent attributes such as language ability, product knowledge, certifications, case origin, and account history. For example, you could define skills for language (Spanish, French, and English); for product knowledge (software and hardware); and for certifications (CompTIA, CCNP).

You can assign each agent a skill and can optionally assign a proficiency level (0–10, where 0 indicates the lowest skill level and 10 indicates the highest level) for that skill. For example, an agent who speaks fluent Spanish could have the skill = Spanish and the proficiency level = 10 for expert.

Skills are assigned to incoming work items by the SkillRequirements object in the API. The PendingServiceRouting object adds attributes to the work item that represent the skill (skill id), priority, skill proficiency, and timestamp.

Work items are routed by creating a PendingServiceRouting object. The PendingServiceRouting object can have multiple SkillRequirements objects associated with it.

When a work item requires multiple skills, it's routed to an agent who possesses all of the required skills.

When multiple agents have the same skill, the work item is routed to the agent who is first available based on the routing type (either most available or least active) that you use in your org. If the agent doesn't accept the work item, then it's routed to the next available agent. The Salesforce API remembers the agent who last declined the work (Last Declined Agent) or who last didn't accept the work within the specified time (Push Timeout), and won't route the work to that agent again.

You can set the push timeout on the PendingServiceRouting object to automatically push work to another agent if the first agent doesn't accept the work within a specified time.

Agents can transfer a work item to another skill set. For example, if an agent accepts a case but realizes that she doesn't have the right skills, she can specify the required skills and transfer the case. The case is transferred to an agent who possess all of the required skills.

Supervisors can monitor agent workload and unassigned work items and agent work in Omni Supervisor. The Agent Summary tab shows agent availability, capacity, and what work items agents are working on. The Backlog tab shows work items that aren't assigned to an agent, and it shows which skills are needed for the work item.

How Does Skills-Based Routing Differ from Queue-Based Routing?

Skills-based routing allows work items to be routed using more sophisticated and dynamic criteria than queue-based routing.

Available in: Salesforce Classic and Lightning Experience

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

 **Important:** You can either use queues or skills-based routing to route work items to agents. If you enable skills-based routing, you can't use queues.

Queues generally are designed to represent a single skill. For example, you might have a Spanish-language queue and a Level 3 technical support queue.

Queues route work to agents who are members of the queue. Although you can have multiple queues, and agents can be members of multiple queues, a work item can be assigned only to one queue at a time.

In contrast, skills-based routing looks at the skills required to complete the work item, identifies agents who have those skills, and routes the work item to an agent who has all of the requisite skills and who has available capacity to take on the work.

Considerations

Skills-based routing is set up using the Salesforce setup pages and the API. Administrators who are setting up skills-based routing should be familiar with Apex and using the API.

Available in: Salesforce Classic and Lightning Experience

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

Skills-Based Routing Limitations

Skills-based routing has the following limitations.

Available in: Salesforce Classic and Lightning Experience

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

 **Important:** You can either use queues or skills-based routing to route work items to agents. If you enable skills-based routing, you can't use queues.

Skills-based routing isn't supported for external routing.

Skills-based routing for Omni-Channel is supported only on the following objects: Cases, Leads, Orders, and Custom Objects. You can't route Live Agent chats, SOS video chats, or Salesforce records for other objects using skills-based routing.

If a work item requires certain skills, but no agents have those skills, then the work item isn't routed. This situation is similar to how items in a queue are treated when no agents are online. If your org uses Omni-Channel Supervisor, the support manager can look at the Backlog and see which work items haven't been assigned to an agent.

Set Up Skills-Based Routing

Follow these steps to set up skills-based routing for Omni-Channel in your org.

Available in: Salesforce Classic and Lightning Experience

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

The setup instructions start at the beginning and assume that you aren't using Omni-Channel. If you're already using Omni-Channel in your org, that's great! In that case, start by reviewing the [considerations](#) on page 226 and [limitations](#) on page 226, and then [enable skills-based routing](#) on page 228.

IN THIS SECTION:

1. [Enable Omni-Channel](#)
Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.
2. [Enable Skills-Based Routing](#)
Enable skill-based routing in your org.
3. [Create Skills for Skills-Based Routing](#)
Skills identify your agents' areas of expertise.
4. [Create Service Resources for Agents](#)
Service resources represent individual agents. Create a service resource for each agent.
5. [Assign Skills to Service Resources](#)
Assign skills to your agents to track their areas of experience and their level of proficiency for each skill.
6. [Route Work Items Using Skills](#)
To route work items using skills, create a PendingServiceRouting object and the associated SkillRequirement objects. The PendingServiceRouting object is a standard Salesforce object that represents the work item that is going to be routed. The SkillRequirement object is a standard Salesforce object that represents the skill and the proficiency level.

Enable Omni-Channel

Enable Omni-Channel to gain access to the objects that you'll use to set up the feature in your organization.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

1. From Setup, enter *Omni-Channel Settings* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Enable Omni-Channel**.
3. Click **Save**.

Enable Skills-Based Routing

Enable skill-based routing in your org.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:

- “Customize Application”

! **Important:** You can either use queues or skills-based routing to route work items to agents. If you enable skills-based routing, you can't use queues.

1. From Setup, enter *Omni-Channel* in the Quick Find box, then select **Omni-Channel Settings**.
2. Select **Use Skills-Based Routing**.
3. Click **Save**.

Create Skills for Skills-Based Routing

Skills identify your agents' areas of expertise.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Omni-Channel:

- “Customize Application”

Agents can transfer work items to skills, so an agent with the right skills can resolve the issue.

When agents open the transfer dialog and search for skills, the search process looks for matching skills within only the first 2,000 skills. If more than 2,000 skills are set up, then the search results show matching skills from only the first 2,000 skills that were created.

1. From Setup, enter *Omni-Channel* in the Quick Find box, then select **Skills**.
2. Click **New**.
3. Enter a name for the skill.
For example, you can create a skill that's called “Spanish” to denote agents who speak Spanish.
4. Optionally, enter a description of the skill.
5. Skip the Assign Users and Assign Profiles sections. Instead, add these skills to service resources.
6. Click **Save**.

SEE ALSO:

[Transfer a Work Item to a Different Skill Set](#)

Create Service Resources for Agents

Service resources represent individual agents. Create a service resource for each agent.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create service resources:

- “Create” on service resources

 **Note:** The visibility of the Service Resource tab might be turned off by default. If you don’t see it, check the tab visibility. For more details, see the topic [Tab Settings](#) in Salesforce Help.

1. Open the Service Resources tab.
2. Click **New**.
3. For **Name**, enter the name of the agent.
4. Select the **Active** checkbox.
A service resource must be active to receive work items.
5. For **User**, use the lookup icon to select the agent.
6. For **Resource Type**, select *Agent*.
7. Click **Save**.

Assign Skills to Service Resources

Assign skills to your agents to track their areas of experience and their level of proficiency for each skill.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign skills to service resources:

- “Edit” on service resources

Create skills before you can assign skills to agents.

1. Open the Service Resources tab.
2. Select the service resources that you want to assign skills to.
3. In the Skills related list, click **New Service Resource Skill**.
4. Select a skill.
Skills must be created before they can be assigned to a resource; to learn how, see topic [Create Skills for Skills-Based Routing](#) in Salesforce Help.
5. Optionally, enter a skill level 0–10 based on how your business measures skill level.
6. Enter a start date, and if needed, an end date.
For example, if an agent must be recertified in a skill every six months, enter an end date that’s six months later than the start date.
7. Click **Save**.
The service resource’s skill now appears in their Skills related list.

Route Work Items Using Skills

To route work items using skills, create a PendingServiceRouting object and the associated SkillRequirement objects. The PendingServiceRouting object is a standard Salesforce object that represents the work item that is going to be routed. The SkillRequirement object is a standard Salesforce object that represents the skill and the proficiency level.

Available in: Salesforce Classic and Lightning Experience

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

This example shows a sample workflow that uses an Apex action class to create the PendingServiceRouting object and the SkillRequirement object. The example assumes that there's a Service Channel object with the DeveloperName "Case" and that there are skill objects with the DeveloperNames "English," "French," and "Spanish."

IN THIS SECTION:

[Define an Apex Action Class for a Skills-Based Workflow](#)

Define an Apex class that routes work items using skills. Here's an example of an Apex action class for skills-based routing that creates the PendingServiceRouting object and SkillRequirement object.

[Create a Workflow to Trigger Skills-Based Routing](#)

Use the Process Builder to define a workflow that triggers skills-based routing. In this example, the workflow operates on the Case object and triggers the Apex action class when a case record is created.

Define an Apex Action Class for a Skills-Based Workflow

Define an Apex class that routes work items using skills. Here's an example of an Apex action class for skills-based routing that creates the PendingServiceRouting object and SkillRequirement object.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To define and edit Apex classes:

- "Author Apex"

See the Salesforce Developer Guide for details about these objects:

- PendingServiceRouting
- ServiceResources
- SkillRequirement

When you create a skills-based PendingServiceRouting object, make sure that any existing code (including triggers and workflows, etc.) doesn't simultaneously add work items to an Omni-Channel queue.

 **Note:** By default, the Skill Level field is protected by [field-level security](#). You might need to change the access level for this field so your users can create the SkillRequirement object with Skill Levels.

1. From Setup, enter `Apex` in the Quick Find box, then select **Apex Classes**.
2. Click **New**.
3. In the **Apex Class** field, enter the Apex code similar to what's shown in the example.
4. Click **Save**.

Use this Apex class when you create a workflow for skills-based routing.

 **Example:**

```
Global class SkillsBasedRouting {
    @InvocableMethod
    public static void routeUsingSkills(List<String> cases) {
        List<Case> caseObjects = [SELECT Id, Description FROM Case WHERE Id in :cases];

        for (Case caseObj : caseObjects) {
            try {
                // Create a PendingServiceRouting to initiate routing
                createPendingServiceRouting(caseObj);
            } catch(exception e) {
                System.debug('ERROR:' + e.getStackTraceString());
                throw e;
            }
        }
    }

    static void createPendingServiceRouting(Case caseObj) {
        // Create a new SkillsBased PendingServiceRouting
        PendingServiceRouting psrObj = new PendingServiceRouting(
            CapacityWeight = 1,
            IsReadyForRouting = FALSE,
            RoutingModel = 'MostAvailable',
            RoutingPriority = 1,
            RoutingType = 'SkillsBased',
            ServiceChannelId = getChannelId(),
            WorkItemId = caseObj.Id,
            PushTimeout = 0
        );
        insert psrObj;
        psrObj = [select id, IsReadyForRouting from PendingServiceRouting where id =
: psrObj.id];

        // Now add SkillRequirement(s) to the PendingServiceRouting
        SkillRequirement srObj = new SkillRequirement(
            RelatedRecordId = psrObj.id,
            SkillId = getSkillId(caseObj.Description),
            SkillLevel = 5
        );
        insert srObj;

        // Update PendingServiceRouting as IsReadyForRouting
        psrObj.IsReadyForRouting = TRUE;
        update psrObj;
    }

    static String getChannelId() {
        ServiceChannel channel = [Select Id From ServiceChannel Where RelatedEntity =
'Case'];
        return channel.Id;
    }
}
```

```

static String getSkillId(String caseDescription) {
    String skillName = 'English';
    if (caseDescription != null) {
        if (caseDescription.contains('Spanish')) {
            skillName = 'Spanish';
        } else if (caseDescription.contains('French')) {
            skillName = 'French';
        }
    }

    Skill skill = [Select Id From Skill Where DeveloperName = :skillName];
    return skill.Id;
}
}

```

After defining the Apex action class, [create a workflow](#) on page 232 that triggers the Apex action class on work items.

Create a Workflow to Trigger Skills-Based Routing

Use the Process Builder to define a workflow that triggers skills-based routing. In this example, the workflow operates on the Case object and triggers the Apex action class when a case record is created.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create, edit, or view processes:

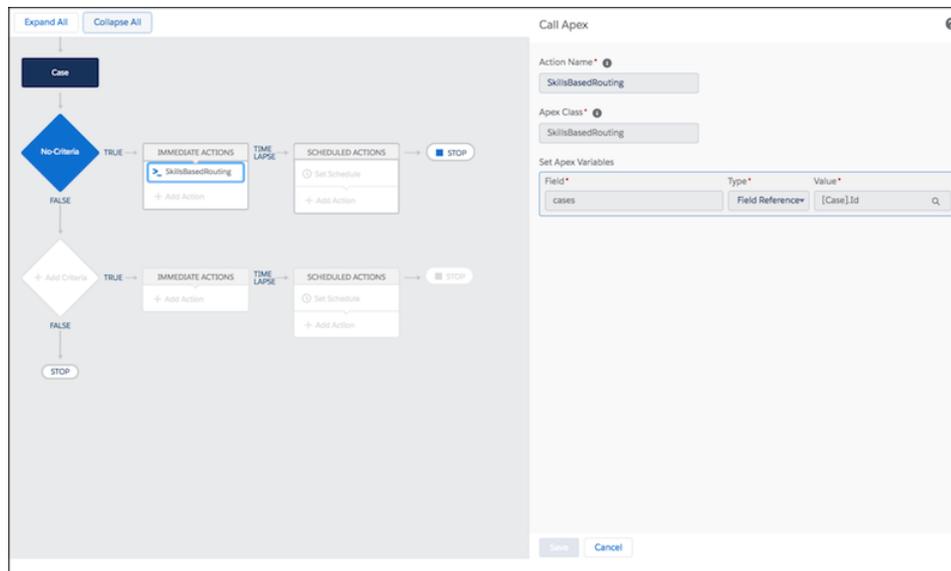
- "Manage Flow" AND "View All Data"

Before you start, [define the Apex action class](#) on page 230 that creates the PendingServiceRouting object and SkillRequirement object.

1. From Setup, enter Process Builder in the Quick Find box, then select Process Builder.
2. Click New.
3. In the New Process modal window, complete the following fields:
 - a. For **Process Name**, specify the name for this process, such as "Skills-based routing."
 - b. The **API Name** is automatically populated.
 - c. For **Description**, optionally describe what this process does.
 - d. For **This process starts when**, select **A record changes**.
4. On the next page, in the **Choose Object and Specify When to Start the Process** configuration, select the **Case** object.
5. For **Start the process**, select **Only when a record is created**.
6. Click **Save**.
In the diagram, the Add Object box is changed to Case.
7. Click the **Add Criteria** diamond.
8. For **Criteria for Executing Actions**, select **No criteria--just execute the actions!**
9. Click **Save**.
10. In the **Immediate Actions** box, click **Add Action**.
11. In **Action Type**, select **Apex**.

12. For **Action Name**, enter the name of your action.
13. For **Apex Class**, enter the name of the Apex class that you created.
14. For **Set Apex Variables**, set the following parameters:
 - a. For **Field**, select **cases**.
 - b. For **Type**, select **Field Reference**.
 - c. For **Value**, use the lookup icon to select **[Case].Id**.
15. Click **Save**.
The activation window opens.
16. To activate this process, click **Confirm**.
The activation window closes. When a case is created, it triggers this workflow and routes the case based on skills.

 **Example:**



Transfer a Work Item to a Different Skill Set

You can transfer a work item, such as a case, to a different skill set, so an agent with the right skills can resolve the issue.

Available in: Lightning Experience

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

USER PERMISSIONS

To transfer work items to a different skill:

- Skills-based routing is enabled and set up in your org

When agents open the transfer dialog and search for skills, the search process looks for matching skills within only the first 2,000 skills. If more than 2,000 skills are set up, then the search results show matching skills from only the first 2,000 skills that were created.

Work items are transferred to an agent who possesses all of the required skills. If an agent who has all of the required skills isn't available, then the work item is not assigned. Supervisors can manually assign the work item to an agent.

If the transferring agent possesses all of the required skills, then the work item can be reassigned to that agent.

When a work item is transferred, the status changes to *Transferred*.

 **Note:** The transfer to skill dialog isn't supported in Salesforce Classic. Agents using Salesforce Classic can accept work items that are transferred to skills, but they can't transfer work items to skills.

1. Click the transfer icon.

The transfer dialog is displayed. The transfer dialog shows the skills that are attached already to the work item.

2. Search for the skill that the work item needs.
3. To add the skill to the work item, select the skill.

You can add several skills to the work item. For example, you could select billing and Spanish for a case that needs a Spanish-speaking agent who's knowledgeable about your company's billing practices. First, search for the "billing" skill and add it. Next, search for "Spanish" and add it, and so on.

4. Click **Transfer**.

The work item is transferred to an agent who has the required skills.

Use External Routing for Omni-Channel

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs. External routing is supported with Omni-Channel in both Salesforce Classic and Lightning Experience.

Available in: Salesforce Classic and Lightning Experience

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

Multiple routing options, one console. Give your agents more routing options by integrating an external routing implementation with Omni-Channel. Learn more about external routing and how to set it up in the [Omni-Channel Developer Guide](#).

Omni-Channel Reference

Understand how Omni-Channel routing works and reference the fields for agent work records and user presence records.

IN THIS SECTION:

[How Does Omni-Channel Queue-Based Routing Work?](#)

Do data models make your heart skip a beat? Want to understand the ins and outs of how Omni-Channel routes work items to your agents? Then we have a treat for you. Omni-Channel pushes work items to the right agent at the right time so that your support team can efficiently help customers with their problems. But how does queue-based routing work under the hood? Let's dive in.

[Fields for Agent Work Records](#)

Every time an object is routed to an agent through Omni-Channel, Salesforce creates an Agent Work record that logs information about the work assignment and how it's routed. Agent Work records contain fields that help you track information about the assignments your agents are working on. If the same work item is routed multiple times, that work item is associated with multiple Agent Work records.

[Fields for User Presence Records](#)

Every time agents change their Presence Statuses in Omni-Channel, Salesforce creates a User Presence record to log all of the agents' activities while they're signed logged in with that status. User Presence records contain fields that help you track information about your agents' availability.

How Does Omni-Channel Queue-Based Routing Work?

Do data models make your heart skip a beat? Want to understand the ins and outs of how Omni-Channel routes work items to your agents? Then we have a treat for you. Omni-Channel pushes work items to the right agent at the right time so that your support team can efficiently help customers with their problems. But how does queue-based routing work under the hood? Let's dive in.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited, and Developer** Editions

Omni-Channel routes work through two separate processes.

- First, when a new work item is assigned to an Omni-Channel queue, Omni-Channel attempts to route it to an agent. Omni-Channel routes work items by the priority of the queue that they're assigned to, so the most important work items are pushed to agents first. Next, items are routed based on how long they've been sitting in the queue. The oldest work items are pushed to agents before more recent ones. (Let's talk about the details of how that happens in a minute.)
- Second, when an agent's ability to receive work changes (perhaps they come back from "away" status, or they finish another work item), Omni-Channel tries to find work that can be routed to that agent.

Routing New Work Items

When a work item is created, it gets assigned to a queue. If that queue is associated with a Routing Configuration, it's added to a list of items that are still waiting to be routed to agents.

Then Omni-Channel determines which agents are available and how much work each agent is working on. This information comes from the UserServicePresence API object, which tracks an agent's current capacity for work items.

Routing Pending Work Items

When a new work item is added to the list of pending items, Omni-Channel determines whether it can immediately route the work item to an agent.

First, Omni-Channel identifies if any agents are online with a Presence Status that's linked to the correct Service Channel. Let's say your organization receives a new case that's assigned to an Omni-Channel queue. Omni-Channel determines if there's a Service Channel for cases. Then it checks which agents are online with a status that lets them receive new work items.

Scenario	What Happens
No agents are available.	If there isn't an agent online who has the right status, Omni-Channel keeps the work item in the list of items that need to be assigned to an agent.
Agents are available, but don't have capacity for new work.	If there are one or more agents who are available, Omni-Channel checks to see if any of those agents have the capacity to take on a new work item. If there are no agents with enough capacity for more work, it leaves the work item in the list.
Agents are available and have capacity for more work.	If there are agents that 1) are available and 2) have capacity to work on the item, Omni-Channel checks which agent to send the work to based on your organization's routing settings. If your routing configuration uses the Least Active routing model , Omni-Channel looks for the agent who currently has the

Scenario	What Happens
	<p>least amount of work compared to other agents who could take on the work item. It then routes the work item to that agent.</p> <p>If your routing configuration uses the Most Available routing model, Omni-Channel looks for the agent who has the largest gap between the maximum amount of work that they can handle and the amount of work that they are working on. It then routes the work item to that agent.</p> <p>But what if there's a tie between two or more agents? In that case, Omni-Channel routes the work to the agent who received a work item the longest ago. Suppose that Agent A received work 10 minutes ago and closed it 2 minutes ago. Agent B received work 8 minutes ago and closed it 5 minutes ago. In this situation, the work would go to Agent A.</p>

When an Agent's Ability to Receive Work Changes

When an agent logs in to Omni-Channel, finishes a work item, or changes status, Omni-Channel checks to see if there is any work that it can route to the agent.

Scenario	What Happens
The agent is away.	Omni-Channel looks for another agent who can take the work.
The agent is available, but doesn't have capacity for work.	Omni-Channel looks for another agent who can take the work.
The agent is available and has capacity for more work	<p>Omni-Channel looks at the list of work items that are waiting to be routed to an agent. It checks to see if the agent is qualified to work on any of the objects, based on how much of the agent's capacity the objects will take up, and the service channel that's associated with the agent's status. For example, if the agent is online with a status that makes them available for cases, it checks the list to see if there are any cases.</p> <p>If the list has work items that the agent is qualified to work on, then the item with the highest priority is routed to the agent. If two or more items have the same priority, the oldest one is routed.</p>

Rerouting a Work Item

Sometimes an agent declines a work item or changes their presence status and are no longer available to accept work. In that case, the work item is rerouted until it finds a qualified agent.

Here's what happens. First, Omni-Channel automatically changes the owner of the work item to the queue from which the object was originally routed. If an agent (Agent A) declines a work item, then Omni-Channel looks for another agent (Agent B) to route it to. However, the work item can be routed to Agent A again if Agent B declines it.

If an agent changes their status and is unavailable, then Omni-Channel looks for another agent to route the work to.

Omni-Channel repeats this process until the work item is routed to a qualified agent.

Assignment Rules, Auto-Response Rules, Escalation Rules, and Workflow Rules

Automation rules, such as assignment, auto-response, escalation, and workflow rules, aren't triggered when Omni-Channel routes a work item to an agent and the agent accepts the work.

When an agent accepts the work and then edits and saves the work item record, automation rules are triggered.

Fields for Agent Work Records

Every time an object is routed to an agent through Omni-Channel, Salesforce creates an Agent Work record that logs information about the work assignment and how it's routed. Agent Work records contain fields that help you track information about the assignments your agents are working on. If the same work item is routed multiple times, that work item is associated with multiple Agent Work records.

An Agent Work record has the following fields, listed in alphabetical order.

Field	Definition
Accept Date	The date and time that the work item was accepted by an agent.
Active Time	The amount of time an agent actively worked on the work item. It tracks when the item is open and in focus in the agent's console.
Agent Capacity when Declined	The amount of an agent's capacity that was available when the agent declined the work item.
Agent Work ID	The Salesforce ID of the Agent Work record.
Assign Date	The date and time that the work item was assigned to an agent and pushed to the agent.
Cancel Date	The date and time that the work item was canceled.
Close Date	The date and time that the agent closed the console tab associated with the work item, setting the Agent Work record's status to "Closed."
Created By	The name of the agent who accepted the work item.
Created Date	The date that the work item was created.
Decline Date	The date that an agent declined the work item request.
Decline Reason	The provided reason for why an agent declined the work request.
Handle Time	The amount of time an agent has the work item open, from the accepted time to the closed time.
Last Modified By	The name of the user who last modified the work item.
Last Modified Date	The date the work item was last modified.
Live Agent Session ID	The session ID for Live Agent chats routed with Omni-Channel.
Name	The unique, Salesforce-generated number of the Agent Work record.
Percentage of Capacity	The percentage of capacity that the work item consumes of the agent's total, possible capacity.

Field	Definition
Push Time-Out	The number of seconds set for push time-out. 0 is returned when push time-out isn't enabled.
Push Time-Out Date	The date and time when push time-out occurred.
Queue	The Salesforce queue from which the work item was routed.
Request Date	The date and time that the Salesforce object was assigned to the queue, creating the associated work item.
Service Channel	The service channel that's associated with the work item.
Should Skip Capacity Check	Indicates whether the check for an agent's available capacity is skipped (true) or not (false) when an externally routed work item is created. This field is used when agents can simultaneously handle work from both Omni-Channel queues and queues using external routing. When true, the receiving agent may exceed their set capacity to accept the item, but they don't receive more Omni-Channel routed work. When false, the receiving agent can't exceed their set capacity and must have enough open capacity to accept the item.
Speed to Answer	The amount of time in seconds between the time the work item was created (the Request Date) and the time the work item was accepted by an agent (the Accept Date).
Status	<p>The status of the Agent Work record. Valid values are:</p> <ul style="list-style-type: none"> Assigned – The item is assigned to the agent but hasn't been opened. Opened – The item was opened by the agent. Unavailable – The item was assigned to the agent but the agent became unavailable (went offline or lost connection). Declined – The item was assigned to the agent but the agent explicitly declined it. DeclinedOnPushTimeout – The item was declined because push time-out is enabled and the item request timed out with the agent. Closed – The item is closed. Canceled – The item no longer needs to be routed. For example: a chat visitor cancels their Omni-Channel routed chat request before it reaches an agent.
Units of Capacity	The number of units of an agent's capacity that the work item consumes of the agent's total, possible capacity.
User	The name of the agent to whom the work item was routed.
Work Item	The name of the work item that's associated with the Agent Work record—for example, "Case 123456."

Fields for User Presence Records

Every time agents change their Presence Statuses in Omni-Channel, Salesforce creates a User Presence record to log all of the agents' activities while they're signed logged in with that status. User Presence records contain fields that help you track information about your agents' availability.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

A User Service Presence record has the following fields, listed in alphabetical order. Depending on your field-level security settings, some fields might not be visible or editable.

Field	Definition
At Capacity Duration	The amount of time in seconds that the agent was working at 100% of the agent's capacity, as indicated in the agent's Presence Configuration.
Configured Capacity	The agent's overall capacity, as indicated in the agent's Presence Configuration.
Created By	The name of the agent who set the Presence Status in Omni-Channel.
Created Date	The date when the User Presence record was created.
Idle Duration	The amount of time in seconds that the agent was assigned no work items.
Is Away	Indicates whether the agent's status is a "busy" status.
Is Current Status	Indicates whether the agent's Presence Status in the Service Presence Status field is the agent's current Presence Status.
Last Modified Date	The date the User Presence record was last modified.
Service Presence Status	The API name of the Presence Status the agent used to log in to Omni-Channel.
Status Duration	The amount of time in seconds that the agent's status was set to the Presence Status indicated by the Status Name field.
Status End Date	The date and time that the agent logged out of Omni-Channel or changed to another Presence Status.
Status Start Date	The date and time that the agent set the Presence Status.
User	The name of the agent who is signed in to Omni-Channel.
User Presence ID	The autogenerated Salesforce ID of the User Presence record.
Alias	The agent's custom name.
Username	The agent's Salesforce username.

Field	Definition
Status Name	The name of the Presence Status the agents used to log in to Omni-Channel.

Omni-Channel Supervisor

Access real-time operational intelligence with Omni-Channel Supervisor.

With Omni-Channel Supervisor, information about your Omni-Channel agents, queues, and work are streamed live into the panel. Yes, you read that right: live. See waiting times, open work, and more with real-time updates. Omni-Channel Supervisor updates continuously to reflect the most up-to-date data so you always know how your agents are doing.

Keep an eye on Omni-Channel activity with intuitive tab views that show you the big picture of how your agents are doing. Take advantage of filtering and sorting to help you find what you need, and drill down to see details for specific agents, queues, or work items. If your org uses skills-based routing, you can drill down to see details about agents, backlogged work items, and the skills required for work items. The best part? You never have to leave the console.

Omni-Channel Supervisor is supported for:

- Queue-based routing for Omni-Channel
- Skills-based routing for Omni-Channel
- External routing for Omni-Channel

So, what are you waiting for? Let's get Omni-Channel Supervisor up and running!

IN THIS SECTION:

[Create an Omni-Channel Supervisor Configuration \(Beta\)](#)

A supervisor configuration determines which agents a supervisor or group of supervisors can see when they're using Omni-Channel Supervisor.

[Add Omni-Channel Supervisor to the Salesforce Console](#)

Add Omni-Channel Supervisor to the console to get your supervisors up and running.

[Add Omni-Channel Supervisor to a Lightning Console App](#)

Add Omni-Channel Supervisor to the console in Lightning Experience to get your supervisors up and running.

[Get to Know the Omni-Channel Supervisor Tabs](#)

Supervisors can check the health of their call center in real time using the Agents, Queues, and Work tabs in Omni-Channel Supervisor. These tabs let supervisors survey the landscape and see what's open and active, who's assigned to what, and other details such as open capacities and average wait times for customers.

[Sort and Filter in Omni-Channel Supervisor](#)

Organize and focus your real-time data in Omni-Channel Supervisor to effortlessly find the information you need.

Create an Omni-Channel Supervisor Configuration (Beta)

A supervisor configuration determines which agents a supervisor or group of supervisors can see when they're using Omni-Channel Supervisor.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up Omni-Channel:

- "Customize Application"

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

 **Note:** As a beta feature, Omni-Channel Supervisor configurations is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Feature in the IdeaExchange in the Trailblazer Community.

You can't add users to supervisor configurations via roles or "Grant Access Using Hierarchies." Supervisor configurations only support users who are directly assigned to a public group.

1. In Salesforce Classic Setup, enter *Supervisor* in the **Quick Find** box, then select **Supervisor Configurations (Beta)**.
2. Click **New**.
3. Enter a name for your configuration. The Developer Name populates automatically.
4. Add users and profiles to this configuration. The users and profiles are the supervisors for which you want to specify agent visibility.
5. Add at least one public group to this configuration. The members of the public group are the agents that the specified supervisors can see in Omni-Channel Supervisor.

A maximum of 2,000 public groups can be shown in the search results.

6. Click **Save**.

Add Omni-Channel Supervisor to the Salesforce Console

Add Omni-Channel Supervisor to the console to get your supervisors up and running.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited**, and **Developer** Editions

USER PERMISSIONS

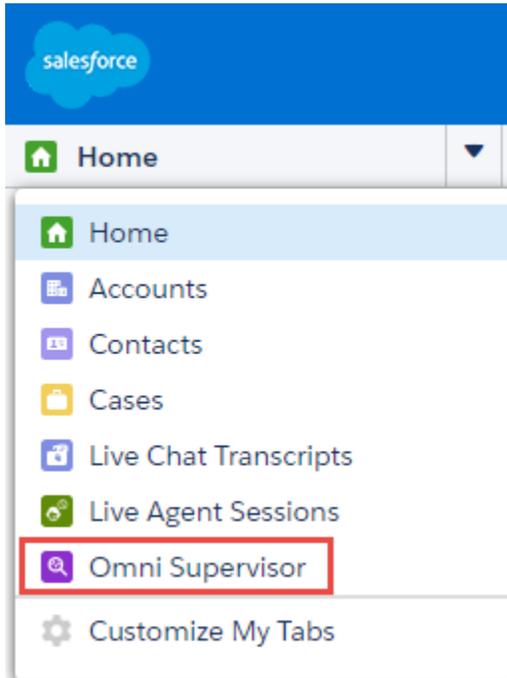
To set up Omni-Channel and manage apps.

- Customize Application

Before adding Omni-Channel Supervisor to the console:

- Make sure you have Omni-Channel enabled and ready-to-go with agents and queues running.
 - Make sure you have a working console app.
1. In Setup, enter *Apps* in the **Quick Find** box, then select **Apps**.
 2. Click **Edit** next to the Salesforce console app that you want to add Omni-Channel Supervisor to. Or, create a new console app. We recommend creating a profile for your supervisors so you can customize a console just for them.
 3. In the **Choose Navigation Tab Items** section, add *Omni Supervisor* to the **Selected Items** list.
 4. Select the profiles you want to assign to this Supervisor-enabled console. The users in the selected profiles must have tab visibility in order to view Omni-Channel Supervisor in their console.
 5. Click **Save**.

Verify that Omni-Channel Supervisor is in the console by opening the console and viewing the tab selections. You should see the option **Omni Supervisor**.



Add Omni-Channel Supervisor to a Lightning Console App

Add Omni-Channel Supervisor to the console in Lightning Experience to get your supervisors up and running.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up Omni-Channel and manage apps.

- Customize Application

Before adding Omni-Channel to the Lightning Service Console:

- Make sure you have Omni-Channel enabled and ready-to-go in Lightning Experience, with agents and queues running.
 - Make sure you have a working Lightning console app for service.
1. In Setup, enter `apps` in the Quick Find box, then select **App Manager**.
 2. Click the dropdown next to the Lightning console app you want to add Omni-Channel Supervisor to, then click **Edit**. We recommend creating a profile for your supervisors so you can customize a console just for them.
 3. Under Select Items, add `Omni Supervisor` to the Selected Items list.
 4. Under Assign to User Profiles, select the profiles you want to assign to this Supervisor-enabled console. The users in the selected profiles must have tab visibility in order to view Omni-Channel Supervisor in their console.
 5. Click **Save**.
 6. Click **Done**.

Verify that Omni-Channel is in the console by opening the console and viewing the tab selections. You should see the option **Omni Supervisor**.

Get to Know the Omni-Channel Supervisor Tabs

Supervisors can check the health of their call center in real time using the Agents, Queues, and Work tabs in Omni-Channel Supervisor. These tabs let supervisors survey the landscape and see what's open and active, who's assigned to what, and other details such as open capacities and average wait times for customers.

IN THIS SECTION:

[Agents Tab](#)

See who's working, who's available, and who's busy with the Omni-Channel Supervisor Agents tab.

[Queues Tab](#)

Gauge your backlog with the Omni-Channel Supervisor Queues tab. The Queues tab is shown if either queue-based routing or external routing for Omni-Channel is enabled in your org.

[Work Tab](#)

Take a stroll through the work items that are making their way through your queues and into your agents' consoles, using the Omni-Channel Supervisor Work tab.

[Backlog Tab](#)

See pending work items for skills-based routing in the Omni-Channel Supervisor Backlog tab. The Backlog tab is shown only if you have skills-based routing enabled in your org.

Agents Tab

See who's working, who's available, and who's busy with the Omni-Channel Supervisor Agents tab.

The Agents tab is a simple way to keep up with your agents' presence statuses, channels, assigned queues, and open capacity. You can even see how long your agents have been logged in and when they last accepted new work.

There are two views in the Agents tab: All Agents and Agents by Queue. All Agents lets you see the big picture of your agents' availability, capabilities, capacity, and workload. It's the default for the Agents tab because it provides the best overall picture of how your agents are doing. Agents logged into Omni-Channel appear in rows, where you can see their status, channels, queues, workload, and capacity.



Note: The Agents by Queue tab isn't available for orgs using skills-based routing.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

AGENT	STATUS	ACTION	TIME IN STATE	TIME SINCE LOGIN	TIME SINCE LAST ACCEPT	CHANNELS	ASSIGNED QUEUES	WORK ITEMS	WORKLOAD	CAPACITY
Agent Awesome	Online since Aug 5, 2016 2:57:02 PM	Change Status	16 s	16 s	16 s	✳️ 🗨️ 📁	Case Queue, Order Queue	1	1 / 1	100%
Agent Casey	Online since Aug 5, 2016 2:57:07 PM	Change Status	12 s	12 s	--	✳️ 🗨️ 📁	Case Queue, Order Queue	0	0 / 1	0%
Agent Colleen	Online since Aug 5, 2016 2:57:06 PM	Change Status	13 s	13 s	12 s	✳️ 🗨️ 📁	Case Lead Queue, Case Queue, Order Queue	1	1 / 1	100%
Agent Kumar	Online since Aug 5, 2016 2:57:05 PM	Change Status	14 s	14 s	--	✳️ 🗨️ 📁	Case Lead Queue, Order Queue	0	0 / 1	0%
Agent Nicholas	Online since Aug 5, 2016 2:57:01 PM	Change Status	18 s	18 s	18 s	✳️ 🗨️ 📁	Case Lead Queue, Order Queue	1	1 / 1	100%
Agent Scott	Online since Aug 5, 2016 2:57:08 PM	Change Status	11 s	11 s	--	✳️ 🗨️ 📁	Hybrid Queue, Order Queue	0	0 / 1	0%
Agent Super	Online since Aug 5, 2016 2:57:04 PM	Change Status	15 s	15 s	--	✳️ 🗨️ 📁	Hybrid Queue, Order Queue	0	0 / 1	0%
Agent Ted	Online since Aug 5, 2016 2:57:09 PM	Change Status	10 s	10 s	--	✳️ 🗨️ 📁	Hybrid Queue, Order Queue	0	0 / 1	0%
Nicolas d'André	Online since Aug 5, 2016 2:57:01 PM	Change Status	18 s	18 s	16 s	✳️ 🗨️ 📁	Case Lead Queue, Case Queue, Hybrid Queue, Order Queue	2	2 / 3	67%
Super Awesome	Online since Aug 5, 2016 2:57:04 PM	Change Status	14 s	14 s	14 s	✳️ 🗨️ 📁	Case Lead Queue, Hybrid Queue, Order Queue	1	1 / 1	100%

Here, you can also change an agent’s status using the Action column. If you select Offline, keep in mind that the agent’s work isn’t tracked anymore.

Select an agent to see Agent Detail and the Agent Timeline to see more nuanced information about how the agent is doing. Agent Detail provides details about an agent’s activity and timestamps. The Agent Timeline displays the agent’s status changes and work via an intuitive calendar view. In Salesforce Classic, you can hover over items in the Agent Timeline for details.

Note: The Agent Timeline shows the AgentWork status, not the status of the work item record itself. When an agent accepts an AgentWork Item and then closes the tab in the console, the AgentWork status is changed to *Closed*.

Agent Detail View

Agent Scott

STATUS: Online since Aug 5, 2016 2:59:31 PM | WORKLOAD: Current Capacity: 1 / 1 | TIME IN STATE: 3 min 17 s | TIME SINCE LOGIN: 3 min 17 s | TIME SINCE LAST ACCEPT: 1 min 21 s

Activity

RECENT STATUSES

- Aug 5, 2016 2:59:31 PM Online
- Aug 5, 2016 2:57:53 PM Offline
- Aug 5, 2016 2:57:08 PM Online
- Aug 5, 2016 2:55:05 PM Offline
- Aug 5, 2016 2:54:19 PM Online

Configurations

QUEUES

- Hybrid Queue, Order Queue

PRESENCE CONFIGURATION

- Default Presence Configuration

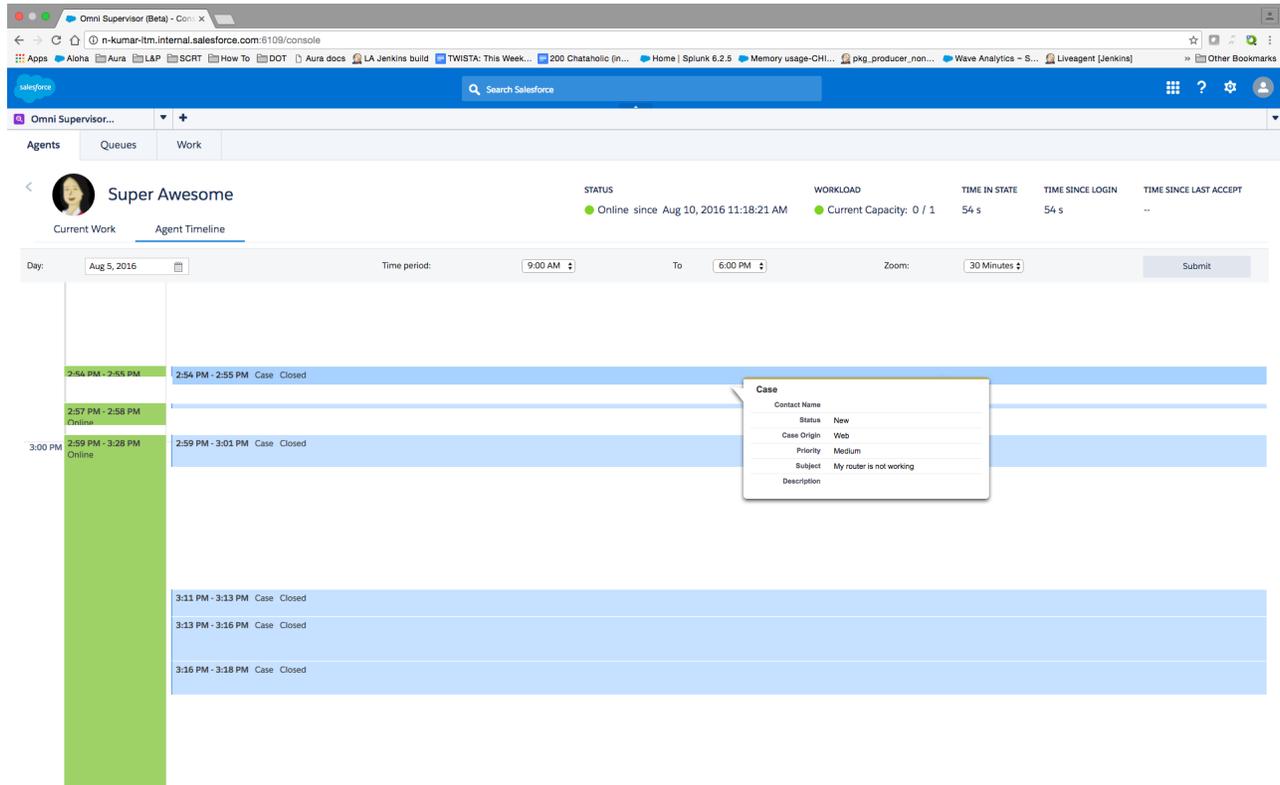
PRESENCE STATUSES

- Busy, Busy3, Online

Current Work

TYPE	DETAILS	QUEUE	WORK SIZE	STATUS	REQUESTED TIME	ASSIGNED TIME	ACCEPTED TIME	HANDLE TIME	SPEED TO ANSWER
✳️	Jim Steele Senior VP BigLife Inc. (555) 555-1212 info@salesforce.com	Hybrid Queue	1	Opened	Aug 5, 2016 2:59:03 PM	Aug 5, 2016 3:01:27 PM	Aug 5, 2016 3:01:27 PM	1 min 21 s	2 min 24 s

Agent Timeline



The Agents by Queue tab provides information about how well your queues are covered. Every queue that has at least one agent that's Online or Away is shown. You can see how many agents are assigned to the queue and how many of them are online, away, or idle. This graph lets you see if you need to rearrange any agents to make sure your incoming work is covered.

QUEUE	TOTAL	# ONLINE	% ONLINE	# AWAY	# AT CAPACITY	% AT CAPACITY	# IDLE	% IDLE	AVG CAPACITY
Case Lead Queue	2	2	100%	0	0	0%	1	50%	10%
Case Queue	1	1	100%	0	1	100%	0	0%	100%
Hybrid Queue	1	1	100%	0	0	0%	0	0%	20%
Order Queue	2	2	100%	0	0	0%	1	50%	10%

IN THIS SECTION:

[Agents Tab Fields](#)

Fields for the Omni-Channel Supervisor Agents tab.

Agents Tab Fields

Fields for the Omni-Channel Supervisor Agents tab.

All Agents Fields

The All Agents view in the Agents tab contains fields with information that lets you know how your agents are doing.

Column	Description
Agent	The first and last name of the agent.
Status	The agent's current presence status, as set in the Omni-Channel widget.
Action	Allows you to change an agent's status.
Time in State	Amount of time the agent has been in the current presence status.
Time Since Login	Amount of time the agent has been logged into an online or busy Omni-Channel status. This field reflects the duration of the agent's entire Omni-Channel session, which ends when the agent goes offline in Omni-Channel or closes their browser.
Time Since Last Accept	Amount of time since the agent last accepted a work item, either explicitly or through auto-accept.
Channels	The agent's associated Service Channels (for agents in an online status), so you know what types of work the available agent can handle.
Assigned Queues	Omni-Channel-enabled Salesforce queues that the agent can receive work through in Omni-Channel. The Assigned Queues column is shown only in orgs that use Omni-Channel queues-based routing.
Skills	Skills that are assigned to the agent. The Skills column is shown only in orgs that use Omni-Channel skills-based routing.
Work Items	All Omni-Channel work currently assigned or open with the agent. You can get an overview of the work items with popup details. <ul style="list-style-type: none"> Assigned work items are in the agent's widget and waiting for acknowledgment

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Column	Description
	<ul style="list-style-type: none"> Open work items have been accepted and the work's tab is open in the agent's Console
Workload	The total size of all assigned and open work with the agent compared to the agent's overall capacity as set through the Presence Configuration. Work is sized through the Routing Configuration associated with the Omni-Channel-enabled queue that's used to route the work to the agent.
Capacity	Percentage calculated from the Workload column. <ul style="list-style-type: none"> 0-50% capacity is shown with a green icon 51-80% capacity is shown with a yellow icon 81-100% capacity is shown with a red icon

Agent Detail Fields

The All Agents view in the Agents tab contains fields that provide information about the particular agent's current work.

Column	Description
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout that provides more context about the work item.
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent.
Work Size	The size of the Omni-Channel work item based on the routing configuration associated with the queue.
Status	Omni-Channel work status. It includes: <ul style="list-style-type: none"> Assigned work items in the agent's widget waiting for acknowledgment Open work items that are assigned to an agent and have an open work tab in the agent's console
Requested Time	Date and time when the item was assigned to the Omni-Channel-enabled queue, which triggers the routing.
Assigned Time	Date and time when Omni-Channel pushed and assigned the item into the agent's Omni-Channel widget.
Accepted Time	Date and time that the item was accepted, either by the agent or by auto-accept. Accepted items are opened in the agent's console.
Handle Time	How long the item has been open with the agent. It's calculated using the difference between "now" and when the agent accepted the work.

Column	Description
Speed to Answer	How quickly the agent responds to work requests. It's calculated using the difference between when the work was requested and when the agent accepted it.

Agents by Queue Fields

The Agents by Queue view in the Agents tab contains fields with information about the work agents are doing in your Omni-Channel queues.

Column	Description
Queue	The name of the Omni-Channel queue used to assign and route the work to the agent. Only queues containing at least one agent in an Online or Away state are displayed.
Total	Total number of agents in the queue.
# Online	Number of agents with an Online status.
% Online	Percentage of agents in the queue who have an online status.
# Away	Number of agents with an Away status.
# At Capacity	Number of agents who are at capacity.
% At Capacity	Percentage of Agents in the queue who are at capacity.
# Idle	Number of agents who are idle. Idle agents have no current work, with 0% capacity consumed.
% Idle	Percentage of agents in the queue who are idle.
Average Capacity	Average capacity among the online and away agents in the queue.

Queues Tab

Gauge your backlog with the Omni-Channel Supervisor Queues tab. The Queues tab is shown if either queue-based routing or external routing for Omni-Channel is enabled in your org.

Spend some time catching up on the activity in your Omni-Channel queues using the Queues Summary view in the Queues tab. You can see your queues' priority, configured work size, type, and wait times. This information can give you an idea of how efficiently work moves through the queue and to your agents, so you can determine which queues are doing well and which could use a few more agents on board.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

QUEUE	PRIORITY	WORK SIZE	TYPE	TOTAL WAITING	LONGEST WAIT TIME	AVERAGE WAIT TIME
Case Lead Queue	1	1 unit	📁 ☆	1	11 min 55 s	11 min 55 s
Case Queue	1	1 unit	📁 🗨️	5	12 min 37 s	12 min 37 s
Hybrid Queue	1	1 unit	📁 ☆	2	12 min 24 s	11 min 45 s
Order Queue	1	1 unit	📁	0	--	--
SOS Queue	1	1 unit	📁	0	--	--

The Queue Details view drills into specific queues so you can see their configurations, available agents, wait times, and work items. If you see lots of agents and not much work, you know it's time to move agents to another queue. But if you see only a few agents and long wait times... it's time to call for backup.

Hybrid Queue		AVAILABLE AGENTS	BUSY AGENTS	AGENTS AT CAPACITY	IDLE AGENTS	TOTAL WAITING	LONGEST WAIT TIME	AVERAGE WAIT TIME
PRIORITY #1 WORK SIZE : 1 unit		0	0	0	0	2	13 min 15 s	12 min 36 s

POSITION	TYPE	DETAILS	WAIT TIME	REQUESTED TIME
1	📁	My router is not working Medium New 00052078	13 min 15 s	Aug 5, 2016 2:39:14 PM
2	☆	John Gardner Exec VP 3C-Systems (555) 555-1212 info@salesforce.com	11 min 56 s	Aug 5, 2016 2:40:33 PM

IN THIS SECTION:

[Queues Tab Fields](#)

Fields for the Omni-Channel Supervisor Queues tab.

Queues Tab Fields

Fields for the Omni-Channel Supervisor Queues tab.

Queues Summary Fields

The Queues Summary view in the Queues tab contains fields that let you know how your agents are doing.

Column	Description
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent. You can click the queue's name to see more detail about it.
Priority	The queue's priority based on its routing configuration.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Column	Description
Work Size	Size of the work items in the queue based on its routing configuration.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Total Waiting	Total number of items currently assigned to the Omni-Channel queue that are waiting for an available agent.
Longest Wait Time	Duration of the longest wait time.
Average Wait Time	Average wait time of all items currently assigned to the queue.

Queue Detail Fields

The Queue Details view in the Queues tab contains fields that provide information about the work items in the queue.

Column	Description
Position	The work item's position in the queue.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout to provide more context about the work item.
Wait Time	Amount of time that the work item is waiting for an agent. It's calculated using the difference between "now" and the item's request time.
Requested Time	Datetime the item was assigned to the queue.

Work Tab

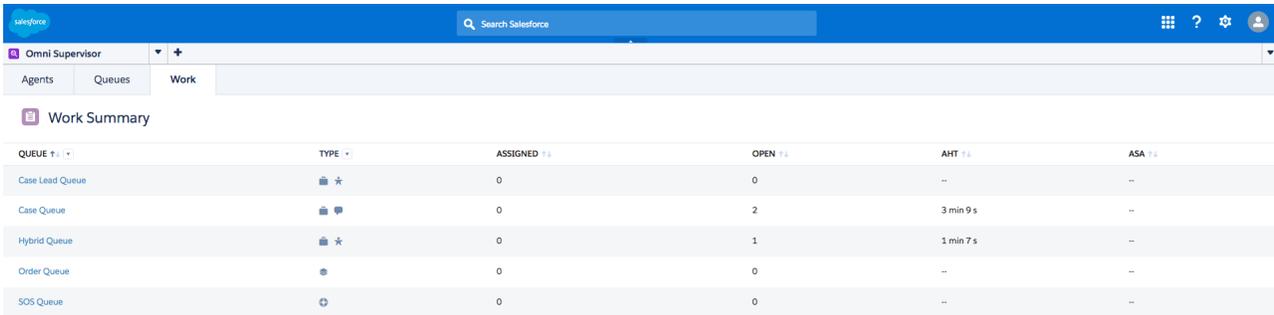
Take a stroll through the work items that are making their way through your queues and into your agents' consoles, using the Omni-Channel Supervisor Work tab.

Use the Work Summary view in the Work tab to get a breakdown of the work that's in your queues. See the type of work each queue can handle alongside a state-of-the-union of its active work items.

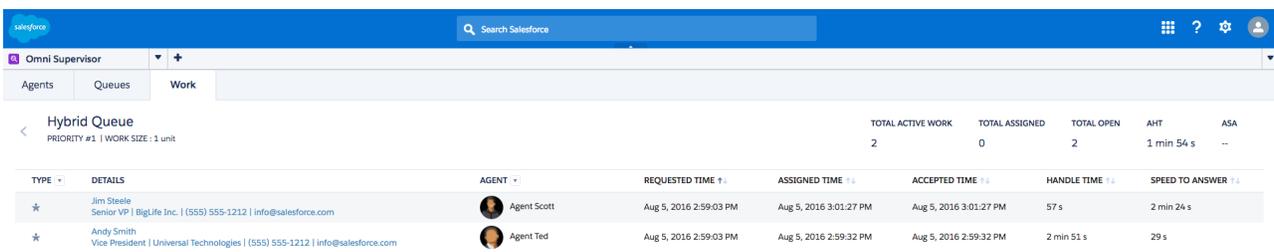
EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



If you want to take a closer look at what’s going on in a queue, click the queue to see its Work Detail.



IN THIS SECTION:

[Work Tab Fields](#)

Fields for the Omni-Channel Supervisor Work tab.

Work Tab Fields

Fields for the Omni-Channel Supervisor Work tab.

Work Summary Fields

The Work Summary view in the Work tab contains fields that show you how work items are being handled.

Column	Description
Queue	The Omni-Channel-enabled queue used to assign and route the work to the agent. You can click a queue for more details about its work.
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Column	Description
Assigned	Total number of items assigned and waiting in the agent's Omni-Channel widget for acknowledgment.
Open	Total number of items accepted and opened in the agent's console.
Average Handle Time (AHT)	Average amount of time the agent's open items have been open. It's calculated using the difference between "now" and when the item was accepted.
Average Speed to Answer (ASA)	Average amount of time an item is waiting before an agent accepts it. It's calculated using the difference between the time the work was requested and accepted. When an agent accepts a work item, the item is removed from this calculation.

Work Detail Fields

The Work Details view in the Work tab contains fields that provide information about the work items in the queue.

Column	Description
Type	Salesforce object type for the work, such as Lead, Case, SOS, etc.
Details	Information from the object's primary compact layout to provide more context about the work item.
Agent	The name of the agent assigned to the work.
Requested Time	Datetime the item was assigned to the queue.
Assigned Time	Datetime when Omni-Channel pushed and assigned the item into the agent's Omni-Channel widget.
Handle Time	Amount of time the item has been open with the agent. It's calculated using the difference between "now" and when the agent accepted the work.
Speed to Answer	How quickly the agent opened the assigned item. It's calculated as the amount of time between when the work was requested and when the agent accepted it.

Backlog Tab

See pending work items for skills-based routing in the Omni-Channel Supervisor Backlog tab. The Backlog tab is shown only if you have skills-based routing enabled in your org.

Available in: Salesforce Classic and Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Skills-based routing for Omni-Channel is available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Keep an eye on your backlog of unassigned work items using the Backlog Summary view in the Backlog tab. You can see your backlog's work item types, work item details, skills, priority, work size, and wait times. The Backlog Summary gives you an overview of the pending work items and the skills that are required to address these work items.

Skills are assigned to work items by the PendingServiceRouting. If there aren't any agents available who possess the required skills, then the work item is placed in the backlog. You can see whether you need more agents with certain skill sets by looking at the skills assigned to the work items in the Backlog.

To drill down and see work items that require a specific skill, go to the Backlog Summary and select a skill in the Skills column. The Skill view shows all pending work items that require the selected skill. You can see the skill set needed and the skill level needed, in addition to the priority, work size, and waiting time for each work item.

IN THIS SECTION:

[Backlog Tab Fields](#)

Fields for the Omni-Channel Supervisor Backlog tab. The Backlog tab is available only in orgs that use skills-based routing for Omni-Channel.

Backlog Tab Fields

Fields for the Omni-Channel Supervisor Backlog tab. The Backlog tab is available only in orgs that use skills-based routing for Omni-Channel.

Available in: Salesforce Classic and Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Skills-based routing for Omni-Channel is available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions with the Service Cloud

Backlog Fields

The Backlog tab shows fields that tell you about pending work items that aren't assigned to an agent.

Column	Description
Type	The type of work item, such as case or lead.
Details	Information from the object's primary compact layout that provides more context about the work item.
Skills	The skills assigned to this work item by the PendingServiceRouting.
Priority	The priority of the work item.
Work Size	The size of the Omni-Channel work item based on the associated routing configuration.
Wait Time	The amount of time that the work item has been pending.

Column	Description
Requested Time	The date and time when the work item entered the backlog.

Skills Fields

The Skills view in the Backlog tab shows you all of the pending work items that require the same skill.

Column	Description
Level	The skill level required for this work item.
Type	The type of work item, such as case or lead.
Details	Information from the object's primary compact layout that provides more context about the work item.
Skills	The skills assigned to this work item by the PendingServiceRouting. The skill level is shown in the parentheses after the skill. For example, Java (2) indicates that you need an agent who's familiar with Java but not an expert.
Priority	The priority of the work item.
Work Size	The size of the Omni-Channel work item based on the associated routing configuration.
Wait Time	The amount of time that the work item has been pending.
Requested Time	Date and time when the item was placed in the Omni-Channel-enabled backlog.

Sort and Filter in Omni-Channel Supervisor

Organize and focus your real-time data in Omni-Channel Supervisor to effortlessly find the information you need.

Now that we've seen what Omni-Channel Supervisor has to offer, we'll show you how to optimize all this great data so you can quickly find what you're looking for. Filter the tables to display particular agents, queues, work types, capacity percentages, etc. and group that information with sorting.

Use filtering to pare down what's on your screen and get what you need faster. For example, if you want to see information about one particular team of agents, go to the All Agents view and select just those agents in the filter. You can apply multiple filters to the same grid, too. Hop seamlessly from an agent's open Leads to the Tier One Queue's open Cases with a Wait Time over 5 minutes.

Use sorting to organize columns as ascending or descending. For example, if you want to see which online agents most recently accepted work, filter the All Agents view to show only agents with an Online status, and sort the Time Since Last Accept column in ascending order.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience

Omni-Channel Supervisor is available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

The screenshot shows the 'Agent Summary' page in Salesforce. It features a table with columns for Agent, Status, Action, Time in State, Time since Login, Time since Last Accept, Channels, Assigned Queues, Work Items, Workload, and Capacity. The agents are sorted by their 'Time since Last Accept' in ascending order, with the most recent acceptances at the top. A search bar for status is visible above the table.

AGENT	STATUS	ACTION	TIME IN STATE	TIME SINCE LOGIN	TIME SINCE LAST ACCEPT	CHANNELS	ASSIGNED QUEUES	WORK ITEMS	WORKLOAD	CAPACITY
Agent Casey	Online	Change Status	1 min 30 s	1 min 30 s	--	☑ ☑ ☑	Case Queue, Order Queue	0	0 / 1	0%
Agent Ted	Online	Change Status	1 min 28 s	1 min 28 s	1 min 27 s	☑ ☑ ☑	Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Scott	Online	Change Status	1 min 29 s	1 min 29 s	1 min 29 s	☑ ☑ ☑	Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Colleen	Online	Change Status	1 min 31 s	1 min 31 s	1 min 31 s	☑ ☑ ☑	Case Lead Queue, Case Queue, Order Queue	1	1 / 1	100%
Agent Kumar	Online	Change Status	1 min 32 s	1 min 32 s	1 min 32 s	☑ ☑ ☑	Case Lead Queue, Order Queue	1	1 / 1	100%
Super Awesome	Online	Change Status	1 min 33 s	1 min 33 s	1 min 32 s	☑ ☑ ☑	Case Lead Queue, Hybrid Queue, Order Queue	1	1 / 1	100%
Agent Super	Online	Change Status	1 min 34 s	1 min 34 s	1 min 33 s	☑ ☑ ☑	Hybrid Queue, Order Queue	1	1 / 1	100%
Nicolas d'André	Online	Change Status	1 min 36 s	1 min 36 s	1 min 34 s	☑ ☑ ☑	Case Lead Queue, Case Queue, Hybrid Queue, Order Queue	3	3 / 3	100%
Agent Nicholas	Online	Change Status	1 min 36 s	1 min 36 s	1 min 35 s	☑ ☑ ☑	Case Lead Queue, Order Queue	1	1 / 1	100%

The online agents who most recently accepted work are at the top of the screen. The possibilities are as endless as your curiosity.

Service Cloud for Mobile

Service Cloud Mobile is the future of customer service on the go. This mobile app is available on both iOS and Android devices. The app gives you real-time access to the same case and queue information that you see on the console, but organized for getting work done from your mobile device.

Use the app to get work done between customer meetings, while waiting for a flight, and even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data, so you can review and update information with just a few taps. The app includes only the features that your case agents and supervisors need for managing cases and queues, so there's no extra clutter in the user interface.

Here's what you can do in the Service Cloud mobile app.

EDITIONS

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

Feature	Description
View and Update Cases	The bread and butter of case management. View cases to learn about customer issues, update case fields with any relevant information, and update case statuses to close or escalate them as needed.
View Case Lists and Case Queues	The case list picker lets you easily view the cases that you're most interested in. You can view all your assigned cases, or view only escalated cases.
Utilize the Case Feed	The case feed that your agents love from Lightning Experience is available in a mobile-friendly UI.
Send Email, Facebook, and Twitter Messages	Easily draft email and social media messages without leaving the app. For Facebook and Twitter messages, you can even specify if your message is a public post or a private message.
Bulk Actions	Update multiple records simultaneously with intuitive bulk actions. Bulk actions let you update case statuses, case owners, and case priorities. You can also delete cases.

Feature	Description
Search Contact and Account Details	Search and discover customer information to make sure that you have all the information you need before tackling a case. Drill into your cases to learn more about customers contacts and accounts.
Configurable Notification Settings	Stay on top of your cases and queues with individually configurable notifications that let each user get just the notifications that are important to them. No admin setup is needed because users can do it themselves from the in-app settings.
Send Feedback to Salesforce	We always want to hear about customer experiences using Salesforce products. Users can let us know what they love, like, or dislike about the app. That way we can keep improving our products so that they work for you and your business.

IN THIS SECTION:

[Service Cloud Mobile Requirements](#)

Learn about the requirements for using Service Cloud Mobile on an Android or iOS device.

[Install the Service Cloud Mobile App](#)

To manage your cases on the go, download the free Service Cloud Mobile app onto your iOS or Android mobile device.

[Provide Notifications to Service Cloud Mobile Users](#)

To send push notifications to Service Cloud Mobile users, install the Service Cloud Mobile managed package in your org. Then, give them the Service Cloud Mobile User permission set to let them receive notifications from the managed package. Agents can configure their own in-app settings to decide which events trigger notifications.

[Service Cloud Mobile Limits and Limitations](#)

Learn about the limits and limitations for Service Cloud Mobile.

Service Cloud Mobile Requirements

Learn about the requirements for using Service Cloud Mobile on an Android or iOS device.

Editions and License Requirements

Service Cloud Mobile is available in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions with Service Cloud. It's available to anyone with a Salesforce user license.

EDITIONS

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

Mobile Device Requirements

iOS Requirements—iOS version 11 and later.

Android Requirements—Android 5.0 or later and Google Play Services 11.8.0 or later.

 **Note:** Service Cloud Mobile isn't optimized for tablets.

Network Requirements

A Wi-Fi® or cellular network connection is needed for the app to function properly and to communicate any changes you make to Salesforce.

Install the Service Cloud Mobile App

To manage your cases on the go, download the free Service Cloud Mobile app onto your iOS or Android mobile device.

Android and iOS users can both download the Service Cloud Mobile app for free from their mobile device. Android users download it from the Google Play and iOS users download it from the App Store.

1. Open the App Store or Google Play on your mobile device.
2. Search for *Service Cloud*.

On the App Store, the app is listed as Salesforce Service Cloud. On Google Play, it's listed as Service Cloud Mobile.

3. Install the app.

You can use the app out-of-the-box—without any set up from your Salesforce administrator. To get notifications from the app, ask your admin to install the managed package and assign you the Service Cloud User permission set.

EDITIONS

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

Provide Notifications to Service Cloud Mobile Users

To send push notifications to Service Cloud Mobile users, install the Service Cloud Mobile managed package in your org. Then, give them the Service Cloud Mobile User permission set to let them receive notifications from the managed package. Agents can configure their own in-app settings to decide which events trigger notifications.

With both the managed package and the Service Cloud Mobile User permission set, your users are able to receive notifications. They can configure which triggers cause them to see notifications in the app.

1. Install the package.

- a. Log in to your org.
- b. Open a new browser tab and install the [Service Cloud Mobile Managed Package](#).

2. Assign the permission set.

- a. From Setup, enter *users* in the Quick Find box, then select **Users**.
- b. Assign the Service Cloud Mobile User permission set. The permission set is automatically available in your org, so your admin won't have to create a new permission set.

EDITIONS

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

Service Cloud Mobile Limits and Limitations

Learn about the limits and limitations for Service Cloud Mobile.

Available Features

A Service Cloud Mobile user doesn't have all the powers that they have in the console or on the Salesforce app. The app is meant to be lightweight, giving users access to the essential case management tools that agents and supervisors need. For a list of available features, see [Service Cloud for Mobile](#).

EDITIONS

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

Limitations

- Viewing a record other than a case, account, or contact prompts users to open that record in the Salesforce app, or to install the Salesforce app if it isn't already.
- Users can't search for cases that aren't included in one of their case lists.
- The Android version only supports quick actions to Log a Call, post to social media, post to the feed, and send email. The iOS version supports the same quick actions and create record and update record actions.
- Notifications can't be accessed after being opened.
- Having no queues and case lists puts the iOS version of the app in an unusable state.
- Users can only mention people if they are commenting on an existing post. Mentioning is not supported when creating a new post.
- Android users can't attach files to posts using the publisher but iOS users can attach Salesforce Files.

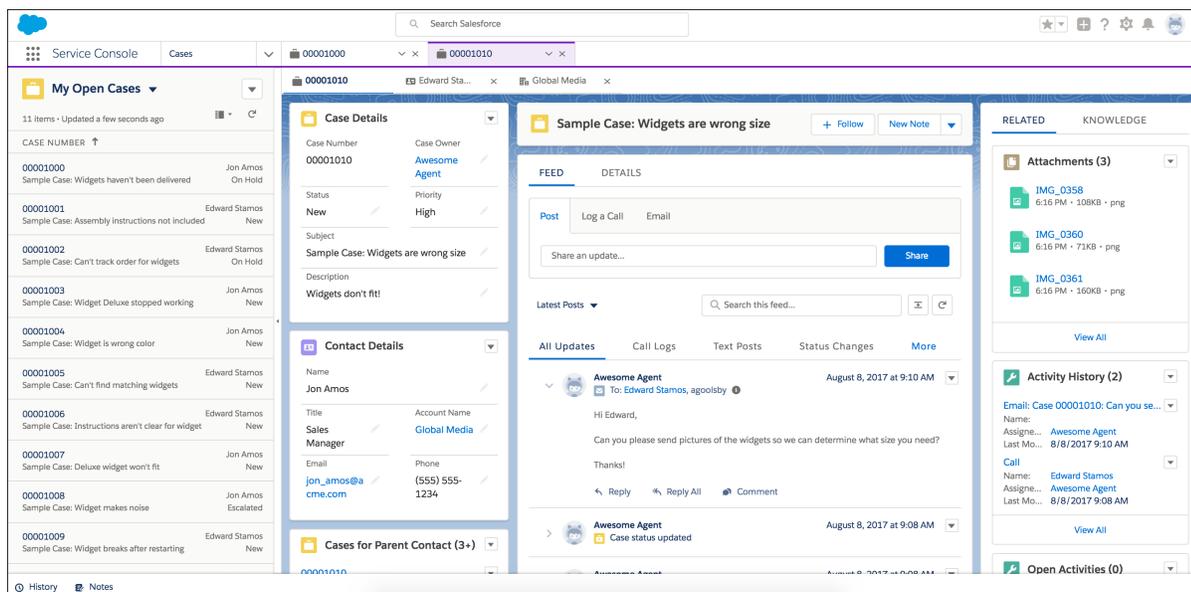
Set Up and Work with Service Console

The Service Console app provides agents a full view of each customer case and gives them the tools to resolve each case quickly. Use the console app to view multiple records and their related records on the same screen, and work through records from a list using split view.

 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more.](#)

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To prepare for your transition to Service Cloud in Lightning Experience, watch  [Get Ready to Transition to Service Cloud in Lightning Experience \(English only\)](#). Then customize the Salesforce-provided Service Console app in Lightning Experience. You can always recreate your Salesforce Classic console app in Lightning Experience, but using Salesforce's out-of-the-box app is faster and easier.

You can create console apps in Salesforce Classic and Lightning Experience. Here's the Service Console in Lightning Experience.



SEE ALSO:

- [Salesforce Console in Salesforce Classic](#)
- [Salesforce Console in Lightning Experience](#)
- [Salesforce Console Limitations](#)

Work with Service Cloud Productivity Tools

Service Cloud offers productivity tools that save your agents time. Quick text lets agents insert predefined text, like notes, messages, and more. Macros lets agents be super users and complete repetitive tasks in one click.

IN THIS SECTION:

[Set Up and Use Quick Text](#)

Quick text saves users time and increases standardization. With quick text, you can insert predefined messages, like greetings, answers to common questions, and short notes. You can insert quick text in the case feed publisher, emails, chats, and more.

[Set Up and Use Macros](#)

Users can run macros to complete repetitive tasks—selecting an email template, sending an email to a customer, updating the case status—all in a single click. A macro is a set of instructions that tells the system how to complete a task. When a user runs a macro, the system performs each instruction. Macros help your team save time and add consistency.

SEE ALSO:

- [Keyboard Shortcuts for Lightning Experience Console Apps](#)
- [Keyboard Shortcuts for Salesforce Classic Console Apps](#)

Set Up and Use Quick Text

Quick text saves users time and increases standardization. With quick text, you can insert predefined messages, like greetings, answers to common questions, and short notes. You can insert quick text in the case feed publisher, emails, chats, and more.

To set up quick text, you enable it, give users permission, and create standardized messages. Then users can insert the quick text. You can also give users the ability to create their own quick text messages.

IN THIS SECTION:

[Enable Quick Text](#)

Enable quick text for your org so that your users can insert predefined messages. Quick text streamlines work for service agents and sales reps.

[Give Users Access to Quick Text](#)

Giving users access to quick text lets them insert predefined messages in their chats, emails, and notes. Service agents can respond to customers and update cases quickly and easily. Sales reps can use quick text in emails, opportunities, and more.

EDITIONS

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

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

[Create Quick Text Messages](#)

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

[Insert and Use Quick Text](#)

Save time by using predefined text. You can use quick text on all standard and custom objects in the following supported quick actions: Email, Log a Call, Social, and Live Agent chats. The shortcut to insert quick text is different in Lightning Experience and Salesforce Classic.

[Quick Text Considerations](#)

Learn how quick text functionality can impact you and your users.

Enable Quick Text

Enable quick text for your org so that your users can insert predefined messages. Quick text streamlines work for service agents and sales reps.

Separate settings in Setup control quick text in Salesforce Classic and Lightning Experience. Enable quick text in each UI. Keep these things in mind.

In Salesforce Classic:

After you enable quick text in Salesforce Classic, you can't disable it.

Quick text is automatically enabled in orgs that have enabled Live Agent, but you might not see it enabled on the Quick Text Settings page in Setup. In that case, manually enable quick text.

In Lightning Experience:

Quick text is enabled by default in all orgs. You can disable it if you like.

If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience. If you gave users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

To enable quick text:

1. From Setup, enter *Quick Text Settings* in the Quick Find box, then select **Quick Text Settings**.
2. Click **Enable Quick Text**.
3. Click **Save**.

After enabling quick text, give users access to quick text by updating their permissions.

SEE ALSO:

[Give Users Access to Quick Text](#)

[Quick Text Considerations](#)

[Create Quick Text Messages](#)

[Insert and Use Quick Text](#)

EDITIONS

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

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

USER PERMISSIONS

To enable quick text:

- Customize Application

Give Users Access to Quick Text

Giving users access to quick text lets them insert predefined messages in their chats, emails, and notes. Service agents can respond to customers and update cases quickly and easily. Sales reps can use quick text in emails, opportunities, and more.

To allow users to insert quick text:

1. Use a permission set or update profiles to give your users Read permission on the Quick Text object. Optionally, you can also give users Create, Edit, and Delete access.

If your quick text messages need to be standardized across your org, limit your users' ability to create, edit, and delete quick text messages. In this case, give these permissions to only a subset of users.

If you gave users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

 **Note:** In orgs created after Spring '18, skip step 2. If quick text messages are defined in your org, users can insert quick text without any additional permissions. All user profiles in your org include read access, at minimum, on the Quick Text object by default.

Users with a Salesforce Platform user license can't work with quick text. These users can't be assigned Quick Text object permissions.

2. Choose one of the following options.

Option	Steps
Give users ownership of at least one quick text message	<p>On a quick text record page, transfer ownership of an existing quick text message to the user. In Salesforce Classic, look for the Change button. In Lightning Experience, look for the Change Owner button.</p> <p>OR</p> <p>Let users create new messages.</p>
Change your org-wide default sharing setting for quick text	<ol style="list-style-type: none"> a. From Setup, enter <i>Sharing Settings</i> in the Quick Find box, then select Sharing Settings. b. Under Organization-Wide Defaults, click Edit. c. From the Default Access dropdown, select Public Read Only or Public Read-Write. d. Click Save.
Use sharing rules	<p>If you don't want to change your org-wide default sharing settings, create sharing rules to specify which groups of users have at least read-only access to quick text messages.</p>

EDITIONS

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

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

USER PERMISSIONS

To set up quick text:

- Customize Application

After giving support agents access to quick text, create standardized messages that they can use.

SEE ALSO:

- [Creating Quick Text Sharing Rules](#)
- [Permissions for Live Agent Support Agents](#)
- [Create Quick Text Messages](#)

Create Quick Text Messages

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

In Setup, add quick text to your app to let your users view the quick text list view.

1. Open Quick Text in your app.
 - In Salesforce Classic, click the **Quick Text** tab.
 - In Lightning Experience, select **Quick Text** from the item picker.
2. Click **New**.

If you have more than one quick text record type, select a record type for the new message, and then click **Continue**.
3. Enter a message name.

Use a name that helps users identify when to use this message.
4. Enter the message.

The message can include line breaks, lists, special characters, merge fields, and up to 4,000 characters.
5. Select the channels in which you want the message to be available.

Depending on which features are enabled in your org, these channels might be available.

 - Email—the Email action
 - Live Agent—Live Agent in the Service Console
 - Phone—the Log a Call action
 - Portal—a community or a customer portal
 - Internal—works with internal fields, like the Change Status action



Note: If you don't specify a channel, the quick text message can't be used because it won't be available in any actions.

The Portal and Internal channels aren't supported in Lightning Experience. These channels display in the picklist but they aren't mapped to any actions in Lightning Experience.

6. Select a category.

In orgs created before Spring '18 that enabled quick text in Salesforce Classic, this field is required and a default Category is provided for you. In orgs created after Spring '18, this field isn't required.
7. Click **Save**.

EDITIONS

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

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

USER PERMISSIONS

To create quick text messages:

- Create, Read, Edit, and Delete on Quick Text

 **Tip:** If you added merge fields, you can preview the quick text data from records that you choose.

SEE ALSO:

[Insert and Use Quick Text](#)

[Generate Emails From Records](#)

Insert and Use Quick Text

Save time by using predefined text. You can use quick text on all standard and custom objects in the following supported quick actions: Email, Log a Call, Social, and Live Agent chats. The shortcut to insert quick text is different in Lightning Experience and Salesforce Classic.

Only quick text messages assigned to the channel for the action that 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. Select the field you want to use quick text on.
2. Use the quick text shortcut to open the quick text browser.
 - In Salesforce Classic, on macOS or Windows, enter `;/` in the message field.
 - In Lightning Experience, enter one of the following commands in the message field.

macOS: `Cmd+`.

Windows: `Ctrl+`.

 **Important:** The quick text shortcut in Lightning Experience works only on U.S. and U.K. keyboards.

3. Find the message you want to insert.

 **Note:** The quick text browsers in Salesforce Classic and Lightning Experience look a bit different, but they do the same thing.

4. To select a message, click it or use your keyboard to highlight it and then press Enter.

If your search results return only one item, press Enter to insert the message.

If the message you select contains merge fields, they're resolved when you add the message. When merge fields don't apply to the record you're working with, the merge field resolves blank. For example, quick text with the `Case.CaseNumber` merge field resolves correctly in a case's Log a Call action. However, that same merge field resolves blank when inserting quick text on a work order's Log a Call action.

SEE ALSO:

[Create Quick Text Messages](#)

EDITIONS

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

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

USER PERMISSIONS

To insert quick text:

- Read on Quick Text

Quick Text Considerations

Learn how quick text functionality can impact you and your users.

Keep these things in mind when setting up and working with quick text.

General Considerations

- Editing the page layout for quick text changes the layout in both Salesforce Classic and Lightning Experience.
- Quick text works with leads. When you convert a lead, you must use quick text on the converted accounts, contacts, and opportunities.
- Administrators can customize the names of quick text channels, but we recommend that you don't. Renaming standard values can prevent quick text messages from being available in the correct channels.

Salesforce Classic Considerations

- Subcategories are available only in Salesforce Classic.
- You can share quick text only in Salesforce Classic.

Lightning Experience Considerations

- Quick text is supported in rich text editors for email.
- The quick text shortcut in Lightning Experience works only on U.S. and U.K. keyboards.
- In orgs created before Spring '18 that enabled quick text in Salesforce Classic, the Category field is required and a default Category is provided for you. In orgs created after Spring '18, this field isn't required.
- To use quick text in the Email global action, you must be on a record page. For example, if you're viewing a list view and open the Email global action, quick text doesn't work.
- The Portal and Internal channels aren't supported in Lightning Experience. These channels display in the picklist when creating quick text, but they aren't mapped to any actions in Lightning Experience.
- Macros don't observe quick text channels.

Merge Field Considerations

In quick text, you can insert merge fields for the following objects: accounts, cases, contacts, custom objects, leads, opportunities, organization, users, and work orders.

Keep these things in mind when adding merge fields to quick text.

- When merge fields don't apply to the record you're working with, the merge field resolves blank. For example, quick text with the `Case.CaseNumber` merge field resolves correctly in a case's Log a Call action. However, that same merge field resolves blank when inserting quick text on a work order's Log a Call action.
- In Live Agent chats, you can only use merge fields for the following objects: account, case, contact, and lead.

EDITIONS

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

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

Set Up and Use Macros

Users can run macros to complete repetitive tasks—selecting an email template, sending an email to a customer, updating the case status—all in a single click. A macro is a set of instructions that tells the system how to complete a task. When a user runs a macro, the system performs each instruction. Macros help your team save time and add consistency.

You can create macros to perform multiple actions. For example, a macro can enter the subject line of an email and update the case status. A single macro can perform multiple actions on different parts of the case feed at the same time.

IN THIS SECTION:

[Prerequisites for Macros](#)

Before you create and run macros, ensure that your org meets the prerequisites for using macros and then add the macros widget or utility to your app.

[Irreversible Macros](#)

Some macros perform actions that can't be undone, such as sending outbound emails to customers or updating a case status. A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.

[Macros in Salesforce Classic](#)

Create, run, and work with macros in Salesforce Classic from the Salesforce Console for Service. In Salesforce Classic, macros are supported on objects with both feed-based layouts and quick actions.

[Macros in Lightning Experience](#)

Create and run macros in Lightning Experience to resolve cases more efficiently in Lightning apps. In Lightning Experience, macros are supported on standard and custom objects that allow quick actions and have a customizable page layout.

[Keyboard Shortcuts for Macros](#)

Use keyboard shortcuts to work even more efficiently with macros.

EDITIONS

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

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

Prerequisites for Macros

Before you create and run macros, ensure that your org meets the prerequisites for using macros and then add the macros widget or utility to your app.

 **Note:** Support for macros is different in Salesforce Classic and Lightning Experience.

In Salesforce Classic, macros are supported on objects with both feed-based layouts and quick actions. Typically, this support includes (but is not limited to): accounts, cases, contacts, and leads. You can only add the Macros widget to the Salesforce Console for Service.

In Lightning Experience, macros are supported on standard and custom objects that allow quick actions and have a customizable page layout. You can add the Macros utility to any Lightning app, including apps with standard navigation and console navigation such as the Sales and Service Console apps.

The following prerequisites apply to Salesforce Classic and Lightning Experience:

- Make sure that the record page you want to use macros with includes a publisher, like the Chatter component, and the actions you want to use, like Email or Log a Call. To customize the page layout, edit the page in Setup.
- Add the Macros widget or utility to the app.

EDITIONS

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

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

In Salesforce Classic, add the Macros widget to the app from the Apps page in Setup. Look for the Choose Custom Console Components section and add the widget there.

In Lightning Experience, add the Macros utility to the app from the App Manager in Setup.

- Users must have the appropriate user permissions to create and run macros.

When editing user profiles in Setup, look in the Standard Object Permission section for the appropriate permissions on the macros object. To allow users to run irreversible macros, such as macros that send emails or update field values, go to the Administrative Permissions section and select Manage Macros Users Can't Undo.

If you are using macros in Salesforce Classic, there are two more prerequisites:

- Enable [feed tracking](#) on the object that you want to run macros on.
- Use a [feed-based page layout](#) on the object that you want to run macros on.

SEE ALSO:

[Customize Actions with the Enhanced Page Layout Editor](#)

[Create Macros in Lightning Experience](#)

[Create Macros in Salesforce Classic](#)

Irreversible Macros

Some macros perform actions that can't be undone, such as sending outbound emails to customers or updating a case status. A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.

To help you identify irreversible macros, look for these icons.

- In Salesforce Classic: 
- In Lightning Experience: 

If you don't have the Manage Macros Users Can't Undo permission, you can still:

- Create and edit macros that don't contain instructions for performing irreversible actions
- Clone, delete, and share macros that do contain instructions for performing irreversible actions

 **Example:** Macros that perform the following types of actions are considered to be irreversible:

- Send email
- Update a case status

EDITIONS

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

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

Macros in Salesforce Classic

Create, run, and work with macros in Salesforce Classic from the Salesforce Console for Service. In Salesforce Classic, macros are supported on objects with both feed-based layouts and quick actions.

IN THIS SECTION:

[Create Macros in Salesforce Classic](#)

You can create a macro by specifying the instructions for actions that the macro performs. A macro is like a little computer program. You tell the macro each step that it performs. This example shows how to create a simple macro.

[Run a Macro in the Salesforce Console for Service](#)

Macros automate a series of repetitive keystrokes that support agents make in the Salesforce Console for Service. You can quickly complete repetitive tasks, such as updating the case status, by running a macro.

[Manage Macros in Salesforce Classic](#)

It's simple to clone, share, and delete macros.

[Bulk Macros](#)

A bulk macro is a macro runs on multiple records at the same time. Bulk macros let support agents quickly address spikes in customer cases involving the same issue. Macros must meet certain criteria to run as bulk macros.

[Examples of Macros in Salesforce Classic](#)

These examples show how you can create different types of macros based on your business needs.

[Search All Text Fields in Macros](#)

Expand the scope of macros search, so agents can quickly find macros by searching for keywords contained in a macro's text fields.

[Publishers and Actions Supported in Salesforce Classic Macros](#)

The following publishers and actions are supported on macros in the Salesforce Console for Service.

SEE ALSO:

[Prerequisites for Macros](#)

[Keyboard Shortcuts for Macros](#)

[Irreversible Macros](#)

Create Macros in Salesforce Classic

You can create a macro by specifying the instructions for actions that the macro performs. A macro is like a little computer program. You tell the macro each step that it performs. This example shows how to create a simple macro.

User Permissions Needed

To view macros:	"Read" on Macros
To create and edit macros:	"Create" and "Edit" on Macros
To create and run irreversible macros:	"Manage Macros That Users Can't Undo"

To create this example macro, the Email Publisher must be enabled in your Salesforce org.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

1. Create a macro.
 - a. In the Salesforce for Service Console, click the **Macros** widget.
 - b. Click **+ Create Macros**.
 - c. For **Macro Name**, enter a name that makes it easy to understand what this macro does.
For example, *Replace email subject with "Steps for Resetting Your Password"*.
 - d. For **Description**, explain the purpose for this macro. The optional **Description** field helps support agents understand what this macro does and distinguish it from similar macros.
2. Add the instructions for the macro.
 - a. Select a context for the macro. The context specifies the part of case feed that the macro interacts with.
For example, selecting **Select Active Tab** tells the macro that it's performing an action on the active case tab in Case Feed.
 - b. Click **Done**. After every instruction, click **Done** to move to the next line.
 - c. Select the object that the macro interacts with.
For example, selecting **Select Email Action** tells the macro to interact with the Email Publisher in Case Feed.
 - d. Select the action that you want the macro to perform.
For example, suppose that you want to replace the subject line of an email in the case, so you select **Replace Subject**. This instruction tells the macro to change the subject field in the email. It also displays a text field, where you can specify the subject that you want to replace.
 - e. In the text field, enter the subject line. This instruction clears the original subject and replaces it with the value you specified in the macro.
For example, you enter *Steps for Resetting Your Password* in the text field. Suppose the customer's original email contained the subject "Password Problems." The agent runs the macro, automatically replacing the original subject with the new subject.
 - f. Finally, select **Submit Action** to tell the macro to execute these instructions.

3. Save the macro.

You've created a macro that replaces the original subject line in an email in Case Feed with a new subject line.

After creating a macro, it's a good idea to run it to make sure that it works the way you want. To test this macro, go to the Salesforce Console for Service and open a case record. Open the Macros widget. Select and run this macro.

IN THIS SECTION:

[Tips for Creating Macros](#)

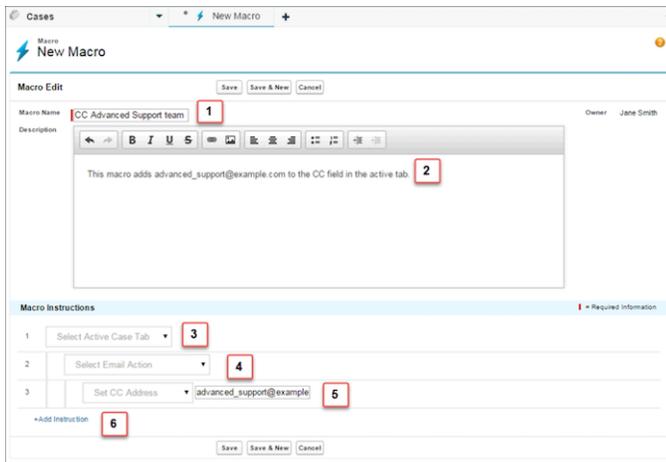
How you name and design your macro can impact its usefulness to support agents. Keep these tips in mind when creating macros.

SEE ALSO:

[Keyboard Shortcuts for Macros](#)

Tips for Creating Macros

How you name and design your macro can impact its usefulness to support agents. Keep these tips in mind when creating macros.



1. The **Macro Name** helps support agents decide which macro to use. The name is used when agents search for macros, so it's useful to use a short name (so that agents can see it in the macros list) that succinctly identifies the macro's purpose.
2. Although **Description** is optional, it is useful for helping support agents to understand what the macro does.
3. The macro instructions are like a little computer program, so you must tell the macro each step, or instruction, to perform. Each instruction is equivalent to a click that the support agent makes when manually performing the task. The first macro instruction selects the object that the macro acts upon, such as the Active Case Tab.
4. The second macro instruction specifies the context, or component of the Salesforce Console for Service, in which the macro works. For example, the Email Action context allows the macro to set fields and perform actions within the Email Publisher.

 **Note:** If a Salesforce Console for Service component isn't enabled and configured, then you can't create a macro for it.

5. The third macro instruction specifies the action that the macro performs. For example, the macro in the screenshot changes the value for the CC Address field in an email action in the active case tab.
6. You can add an additional set of instructions in the same context or in a different context. A simple macro just performs one task. Create more complex macros by adding instructions.

Run a Macro in the Salesforce Console for Service

Macros automate a series of repetitive keystrokes that support agents make in the Salesforce Console for Service. You can quickly complete repetitive tasks, such as updating the case status, by running a macro.

User Permissions Needed

To view macros:	"Read" on Macros
To create and edit macros:	"Create" and "Edit" on Macros
To create and run irreversible macros:	"Manage Macros That Users Can't Undo"

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

 **Note:** You need the Manage Macros That Users Can't Undo permission only if you want to run macros that contain a Submit Action instruction. All bulk macros contain a Submit Action instruction. The lightning bolt icon (⚡) indicates that the macro performs an action—such as sending an email—that cannot be undone.

1. Open the Macros widget.
2. Search for a macro and select it from the macros list.
To search for a macro, enter some letters from its name in the Search Macros box. Salesforce lists macros that contain the search keywords or letters in the results. If the Search Macros box is empty, the list displays your 25 most recently used macros. If you ran a macro or viewed its detail page, then it is considered to be recently used.
3. Optionally, review the macro's description and instructions to make sure that this macro does what you expect.
The instructions show you the steps that the macro performs. Reviewing the instructions is helpful when running a macro for the first time.
4. Click **Run** (▶) to start the macro.
A message displays indicating whether the macro ran successfully. A green dot appears next to each instruction that ran successfully. A red dot and an error message appear next to each instruction that could not be performed, so you can troubleshoot the issue.

Manage Macros in Salesforce Classic

It's simple to clone, share, and delete macros.

IN THIS SECTION:

[Clone Macros](#)

You can quickly copy macros by cloning them. Cloning macros is useful for creating macros that are variants of the source macro.

[Share Macros](#)

Macros use the same sharing model as other objects in Salesforce. You can share macros with public groups and other users, allowing other support agents to increase their efficiency with macros.

Clone Macros

You can quickly copy macros by cloning them. Cloning macros is useful for creating macros that are variants of the source macro.

User Permissions Needed

To view macros:	"Read" on Macros
To clone macros:	"Create" and "Edit" on Macros

Both administrators and support agents can clone macros if they have the appropriate user permissions.

1. Open the Macros widget.
2. Click the macro that you want to clone.
3. If you are using the Macros widget, click the **View Detail** icon (🔍).

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

4. Click **Clone**.
5. In the `Macro Name` field, enter a unique name for the macro.
6. Optionally, modify the instructions for the macro. You can also modify the instructions at another time.
7. Click **Save**.

Share Macros

Macros use the same sharing model as other objects in Salesforce. You can share macros with public groups and other users, allowing other support agents to increase their efficiency with macros.

User Permissions Needed

To view macros:	"Read" on Macros
To share macros:	"Create" and "Edit" on Macros

1. Open the Macros widget.
2. Select the macro that you want to share.
3. Click the **View Detail** icon ().
4. Click **Sharing**.
5. In the New Sharing page, search for a public group or for a user by name.
6. Share the macro by selecting a group or user from the **Available** list and clicking **Add**. To stop sharing a macro, select a group or user from the **Share With** list and click **Remove**.
7. If you're sharing the macro, set the `Access Level` to either *Read Only* or *Read/Write*.
 - *Read Only* allows support agents to view and run the macro.
 - *Read/Write* allows support agents to edit, view, and run the macro.
8. Click **Save**.

Bulk Macros

A bulk macro is a macro runs on multiple records at the same time. Bulk macros let support agents quickly address spikes in customer cases involving the same issue. Macros must meet certain criteria to run as bulk macros.

Bulk macros are supported in:

- Email Publisher in Case Feed on the Salesforce Console for Service
- All Quick Actions except for Social Quick Actions

Bulk macros are not supported in:

- Lightning Experience
- Salesforce Knowledge actions
- Community actions
- Social post actions
- "Add" and "Insert" instructions (such as the Add to Subject instruction or the Insert into HTML Body instruction for the Email Publisher)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

If the bulk macro interacts with the Email Publisher, it can contain only one Email Publisher action.

A bulk macro must contain at least one Submit Action instruction.

 **Example:** For example, suppose that your company has a service outage and lots of customers have contacted customer support. You want support agents to send an email to customers who have opened cases about the outage telling them when the service outage ends. You can create a bulk macro that uses an email template to create and send an email to these customers.

IN THIS SECTION:

[Create a Bulk Macro](#)

This example shows you how to create a bulk macro that sends an email to the contact person for the selected customer cases.

[Tips for Creating Bulk Macros](#)

The key to successfully using bulk macros is to select the right records to run the macro on. Support agents can filter the list views to identify which records to select.

[Run a Bulk Macro on Multiple Records](#)

You can run a bulk macro on only one record at a time, or you can run it on multiple records at the same time. Use bulk macros to quickly address similar customer cases or records.

Create a Bulk Macro

This example shows you how to create a bulk macro that sends an email to the contact person for the selected customer cases.

User Permissions Needed

To view macros:	“Read” on Macros
To create and edit macros:	“Create” and “Edit” on Macros
To create and run irreversible macros:	“Manage Macros That Users Can’t Undo”
To run bulk macros:	“Run Macros on Multiple Records”

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

For example, suppose that your company has a service outage and lots of customers have contacted customer support. You want support agents to send an email to customers who have opened cases about the outage telling them when the service outage will end. You can create a bulk macro that uses an email template to create and send an email to these customers.

These steps show you how to create a bulk macro that sends an email to the contact person on the selected cases. To re-create this example in your Salesforce org, enable the Email Publisher.

1. Create a macro.
2. Add the instructions for the macro.
 - a. Select a context for the macro. The context specifies the object that the macro interacts with. For example, selecting **Select Active Tab** tells the macro that it’s performing an action on the active case tab in Case Feed.
 - b. Click **Done**. After every instruction, click **Done** to move to the next line.
 - c. Select the publisher that the macro interacts with. For example, selecting **Select Email Action** tells the macro to interact with the Email Publisher in Case Feed.
 - d. Select the action that you want the macro to perform. You can select **Apply Email Template** and specify which email template to use.

e. Finally, select **Submit Action** to tell the macro to perform these instructions.

3. Save the macro.

You’ve created a macro that creates and sends an email to the contact person for the selected cases. This macro can be run as a bulk macro because it meets all the criteria for a bulk macro. It interacts with the Email Publisher, it uses a supported instruction, and it includes a Submit Action instruction. You can run this macro as a bulk macro on multiple records at the same time. You also can run it on a single record at a time.

When you look at the macros list, an icon showing a green lightning bolt with two underlines (⚡) appears next to bulk macros. Make sure that this icon appears next to your macro.

Tips for Creating Bulk Macros

The key to successfully using bulk macros is to select the right records to run the macro on. Support agents can filter the list views to identify which records to select.

When you create a bulk macro, it’s a good practice to add an instruction that changes a field value on the record. Agents can filter records in the list view based on the field value. Updating a field value lets agents distinguish the records on which the macro has been run from the cases on which the macro hasn’t been run.

 **Example:** For example, suppose many customers open cases about the same issue in a short time. The support agent can run a bulk macro that emails these customers to tell them that the company knows of the issue and is fixing it. But what happens two days later, when the agent wants to run the bulk macro a second time on new cases about the same issue?

Because agents use filtering to determine which cases to apply the macro to, it’s helpful to add instructions to the bulk macro that change a field value. This way, when the macro runs, it automatically updates the field value. Later on, when the agent has new cases to respond to, the agent can filter cases based on this field.

Run a Bulk Macro on Multiple Records

You can run a bulk macro on only one record at a time, or you can run it on multiple records at the same time. Use bulk macros to quickly address similar customer cases or records.

User Permissions Needed

To view macros:	“Read” on Macros
To create and edit macros:	“Create” and “Edit” on Macros
To create and run irreversible macros:	“Manage Macros That Users Can’t Undo”
To run bulk macros:	“Run Macros on Multiple Records”

 **Note:** You need the Manage Macros That Users Can’t Undo permission only if you want to run macros that contain a Submit Action instruction. All bulk macros contain a Submit Action instruction. The lightning bolt icon (⚡) indicates that the macro performs an action—such as sending an email—that cannot be undone.

To run bulk macros, the [Enable Enhanced Lists setting](#) must be enabled in your org.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

You can run bulk macros on records from the Accounts, Cases, Contacts, and Leads objects. However, you can run a bulk macro only on records in one object list view at a time. For example, you can run a bulk macro on multiple cases in the Cases list view, but not on cases and accounts at the same time.

An icon showing a green lightning bolt with two underlines () indicates whether a macro is a bulk macro.

Bulk macros are processed in increments of 10 macros at a time. You can run a bulk macro on more than 10 cases, but the system processes the macro in groups of 10 at a time.

1. In the Case list view, select the cases that you want to run the macro on.
You can filter the cases to identify which cases you want to run the macro on.
2. Open the Macros widget.
3. In the Macro widget, select a macro with the green lightning bolt icon () and click **Run**.
4. In the confirmation window, click **OK** to continue.
The macro runs on the selected cases. In the list view, the cases on which the macro ran successfully are highlighted in green and denoted by a green check mark icon. Cases that the macro didn't run successfully on are highlighted in red and denoted by a red X icon. To see an explanation about why the macro didn't work on a case, hover over the red X icon.

SEE ALSO:

[User Interface Settings](#)

Examples of Macros in Salesforce Classic

These examples show how you can create different types of macros based on your business needs.

IN THIS SECTION:

[Add and Replace Field Values in a Case Using Macros](#)

Suppose that your support agents often add the same field values to a record, or that they often replace a field value. You can create a macro that automatically adds content to a field or that replaces the values in a field. Using a macro saves agents time because it automates repetitive and routine actions, freeing them to focus on helping customers.

[Insert Quick Text in a Social Post](#)

Suppose that support agents often respond to customer questions on social networks, such as Twitter or Facebook. You can use a macro to automatically insert a reply into the post using Quick Text or text. This type of macro enables agents to quickly respond to customers without interrupting their workflow.

[Automatically Attach a Salesforce Knowledge Article to an Email in Case Feed Using Macros](#)

Perhaps your support agents often send customers the same article in Salesforce Knowledge. This example explains how to create a macro that automatically selects a specific article and inserts it into an email in Case Feed. This macro lets agents answer a common customer question by clicking one button, instead of spending time searching for the article and copying it into the email.

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

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

Add and Replace Field Values in a Case Using Macros

Suppose that your support agents often add the same field values to a record, or that they often replace a field value. You can create a macro that automatically adds content to a field or that replaces the values in a field. Using a macro saves agents time because it automates repetitive and routine actions, freeing them to focus on helping customers.

The Email Publisher must be enabled in your Salesforce org.

These steps illustrate some ways that you can use Add, Replace, and Insert instructions in a macro.

1. Create a macro.
2. Add the instructions to tell the macro what email field value to replace. This example shows how to replace the Subject field in an email.
 - a. In the Macro Instructions section, click **+Add Instruction**.
 - b. The first instruction tells the macros which object to act upon. Here, select **Select Active Case Tab**.
In Lightning Experience, the first instruction is auto-populated based on the Apply To field.
 - c. The next instruction tells the macro which action in the Case Feed Publisher to interact with. Here, select **Select Email Action**.
 - d. Now, tell the macro what to do in the Email Action. Select **Replace Subject**. In the text field, specify the subject line.
Selecting a Replace instruction clears the existing value in the field, and replaces it with the value specified in the macro.
For example, enter *Update on Your Order*. Suppose that the subject line was *Haven't Received My Order*. The macro clears the old subject line and replaces it with *Update on Your Order*.
3. Add the instructions to tell the macro to replace an email field with a blank value. In this example, we clear the BCC field.
 - a. Select **Replace BCC Addresses**. Leave the text field empty.
Selecting a Replace instruction and leaving the text field empty clears the values in the field, so you end up with a blank field.
4. Add the instructions to tell the macro to insert values into a field. In this example, we add two email addresses to the CC field.
 - a. Select **Add CC Addresses**. In the text field, specify the email addresses. You can specify multiple email addresses by separating them with a comma.
For example, enter *shipping@example.com, invoices@example.com*. Suppose that the CC field already contains *support@example.com*. This macro appends the *shipping@example.com* and *invoices@example.com* after *support@example.com*.
5. Select **Submit Action**. This instruction tells the macro to execute the email action.
6. Save the macro.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view macros:

- Read on Macros

To create and edit macros:

- Create and Edit on Macros

To create an irreversible macro:

- Manage Macros Users Can't Undo

Insert Quick Text in a Social Post

Suppose that support agents often respond to customer questions on social networks, such as Twitter or Facebook. You can use a macro to automatically insert a reply into the post using Quick Text or text. This type of macro enables agents to quickly respond to customers without interrupting their workflow.

The Email Publisher, Quick Text, and Social Customer Service must be enabled in your organization.

These steps illustrate one way that you can use Insert instructions in a macro.

1. Create a macro.
2. Add the instructions to tell the macro what to do. This example shows how to insert Quick Text into a social post.
 - a. In the Macro Instructions section, click **+Add Instruction**.
 - b. The first instruction tells the macros which object to act upon. Here, select **Select Active Case Tab**.
 - c. The next instruction tells the macro which action in the Case Feed publisher to interact with. Here, select **Select Social Action**.
 - d. Now, tell the macro what to do in the social action. Select **Insert into Body**. You can insert either **Quick Text** or **Text**.
 Selecting an Insert instruction appends the Quick Text or Text specified in the macro to the end of the text already in the field. In social publisher actions, the Insert instruction is useful because you can retain the @mention and add text after it.
 - e. Specify which Quick Text you want to macro to use, or enter the text that you want it to use.
3. Select **Submit Action**. This instruction tells the macro to execute the social action.
4. Save the macro.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view macros:

- Read on Macros

To create and edit macros:

- Create and Edit on Macros

To create an irreversible macro:

- Manage Macros Users Can't Undo

Automatically Attach a Salesforce Knowledge Article to an Email in Case Feed Using Macros

Perhaps your support agents often send customers the same article in Salesforce Knowledge. This example explains how to create a macro that automatically selects a specific article and inserts it into an email in Case Feed. This macro lets agents answer a common customer question by clicking one button, instead of spending time searching for the article and copying it into the email.

You must have Salesforce Knowledge One enabled for your organization. The Salesforce Knowledge One component must be enabled and added as a component to the Salesforce Console for Service page.

1. Create a macro.
2. Add the instructions to tell the macro to search for a specific article.
 - a. In the Macro Instructions section, click **+Add Instruction**.
 - b. The first instruction tells the macros which case to act upon. Here, select **Select Active Case Tab**.
 - c. The next instruction tells the macro which part of the console to act upon. Here, select **Select Knowledge Sidebar Component**.
 - d. Now, let's tell the macro what do in the Knowledge Sidebar. Select **Select Articles Search**.
 - e. This step defines the keyword that the Knowledge search uses to find the right article. Select **Set Keywords**. In the text field, you can specify either the article number or a keyword.
 - Article number: The article number retrieves an article by its number, which is useful when you want to select a specific article. The syntax is `articlenumber:123456789`.
 -  **Note:** The syntax is case-sensitive and must be written in lower case.
 - Keywords: You also can search by keywords. Salesforce looks for these keywords in the title and body of the articles in the knowledge base. For example, enter "Reset Your Password."
 - f. Select **Run Search**. This instruction tells the macro to perform the search when someone runs this macro.
3. Add the instructions to tell the macro to insert the article into the email that is being edited in Case Feed.
 - a. Click **Select Most Relevant Article**. This instruction tells the macro to use the article that came up first in the search results.
 - b. Select **Insert into Email as HTML**. This instruction inserts the entire article, including text and images, into the email at the cursor position.
4. Save the macro.

EDITIONS

Available in: Salesforce Classic

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

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

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

USER PERMISSIONS

To view macros:

- Read on Macros

To create and edit macros:

- Create and Edit on Macros

Search All Text Fields in Macros

Expand the scope of macros search, so agents can quickly find macros by searching for keywords contained in a macro's text fields.

For example, suppose that an agent wants to find a macro where the description is "Return Policy - 30 days." The agent could search for "return policy" and see all macros that contain that phrase.

If this setting is enabled, agents can search for macros across all text fields in the macro instructions. If this setting isn't enabled, agents can search for keywords only in the macro's title and description fields.

To let agents search all text fields:

1. From Setup, enter *Macros* in the Quick Find box, then select **Macro Settings**
2. Click **Edit**.
3. Select **Include All Macro Text Fields in Search**.
4. Click **Save**.

Publishers and Actions Supported in Salesforce Classic Macros

The following publishers and actions are supported on macros in the Salesforce Console for Service.

IN THIS SECTION:

[Email Publisher Actions Supported in Macros](#)

These actions are available when you click **Select Email Action** in the macro instructions. Email actions let you modify text in emails in Case Feed. You can create and run macros to perform these actions on the Email Publisher in the Salesforce Console for Service.

[Salesforce Knowledge Actions Supported in Macros](#)

These actions are available when you click **Select Knowledge Sidebar Component** in the macro instructions. Knowledge actions let you search for knowledge articles and add articles to cases. You can create and run macros to perform these actions on the Salesforce Knowledge Publisher in the Salesforce Console for Service.

[Custom Quick Actions Supported in Macros](#)

These actions are available when you click **Select *Name of Quick Action*** in the macro instructions. You can create and run macros to perform custom quick actions in the Salesforce Console for Service.

[Community Publisher Actions Supported in Macros](#)

These actions are available when you click **Select Community Action** in the macro instructions. Community actions let you update and post to Salesforce Communities. You can create and run macros to perform these actions on the Community Publisher in the Salesforce Console for Service.

[Social Actions Supported in Macros](#)

These actions are available when you click **Select Social Action** in the macro instructions. You can create and run macros to perform these actions on the Social Publisher in the Salesforce Console for Service.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create, edit, and delete page layouts:

- Customize Application

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Email Publisher Actions Supported in Macros

These actions are available when you click **Select Email Action** in the macro instructions. Email actions let you modify text in emails in Case Feed. You can create and run macros to perform these actions on the Email Publisher in the Salesforce Console for Service.

To use these actions, you must have the Email Publisher enabled in your Salesforce org and added as a console component to the case page layout.

Bulk macros are supported for Email Publisher actions.

Table 2: Email Publisher Actions Supported in Macros

Action	Description	Supported in Bulk Macros?
Replace To Addresses	Clears the email addresses in the To Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to To Addresses	Adds these email addresses to the To field, but does not delete any addresses already in the To field. To use multiple email addresses, separate them with a comma.	No
Replace CC Addresses	Clears the email addresses in the CC Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to CC Addresses	Adds these email addresses to the CC field, but does not delete any addresses already in the CC field. To use multiple email addresses, separate them with a comma.	No
Replace BCC Addresses	Clears the email addresses in the BCC Address field and replaces them with the specified email addresses. To use multiple email addresses, separate them with a comma.	Yes
Add to BCC Addresses	Adds these email addresses to the BCC field, but does not delete any addresses already in the BCC field. To use multiple email addresses, separate them with a comma.	No
Set From Address	Clears the email address in the From Address field and replaces it with the specified email address.	Yes
Replace Subject	Clears the Subject field and replaces it with the specified text.	Yes
Add to Subject	Appends this text to the end of the Subject field, but does not delete any existing text already in the Subject field.	No
Replace HTML Body	Clears the contents of the email body and replaces it with the specified HTML content.	Yes
Insert into HTML Body	Adds a QuickText or Text into the HTML body text, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Action	Description	Supported in Bulk Macros?
Apply Email Template	Inserts the specified email template into an email in the active case tab.	Yes
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p> <p>A macro that contains a Submit Action instruction can be run as a bulk macro. You must have the Run Macros on Multiple Records user permission to run bulk macros.</p>	Yes

Salesforce Knowledge Actions Supported in Macros

These actions are available when you click **Select Knowledge Sidebar Component** in the macro instructions. Knowledge actions let you search for knowledge articles and add articles to cases. You can create and run macros to perform these actions on the Salesforce Knowledge Publisher in the Salesforce Console for Service.

To use these actions, you must have Salesforce Knowledge enabled in your organization and added as a console component. Salesforce Knowledge actions, such as attaching an article to a case, must be enabled in the console.

 **Note:** The Knowledge Sidebar must be expanded when you run a Knowledge macro. If the sidebar is collapsed, the macro doesn't work.

Internet Explorer 7 and Bulk macros are not supported for Salesforce Knowledge actions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Table 3: Salesforce Knowledge Actions Supported in Macros

Action	Description	Supported in Bulk Macros?
Select Knowledge Sidebar Component	Tells the macro that these instructions affect the Knowledge Sidebar in the console.	No
Select Article Search	Tells the macro that the instructions affect Knowledge search.	No
Set Keywords	<p>Specifies the keywords to use when searching the knowledge base. You can search by:</p> <ul style="list-style-type: none"> Article number: The article number retrieves an article by its number, which is useful when you want to select a specific article. The syntax is <code>articlenumber:123456789</code>. Keywords: You can search by keywords. The Salesforce Knowledge search looks for these keywords in the title and body of the articles in the knowledge base. For example, the phrase <i>Reset Your Password</i> returns articles that contain that phrase. 	No
Run Search	Tells the macro to search the knowledge base using the criteria specified in the Set Keywords instruction.	No

Action	Description	Supported in Bulk Macros?
Select Most Relevant Article	Selects the first article listed in the search results.	No
Attach to Case	Attaches the article to the case.	No
Attach to Email as PDF	Adds the article as a PDF attachment to the email in the case.	No
Insert into Email as HTML	Inserts the article text and links into the email in the case.	No

Custom Quick Actions Supported in Macros

These actions are available when you click **Select** *Name of Quick Action* in the macro instructions. You can create and run macros to perform custom quick actions in the Salesforce Console for Service.

To use these actions, you must have Quick Actions defined in your Salesforce org and added to the case feed page layout.

Bulk macros are not supported on Quick Actions for social actions.

Table 4: Custom Quick Actions Supported in Macros

Action	Description	Supported in Bulk Macros
Replace <text field>	Clears the contents of the text field and replaces it with the specified text.	Yes
Add to <text field>	Adds the specified text to the end of the text field, but does not delete any existing text already there. The Text is inserted at the cursor position.	No
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p> <p>A macro that contains a Submit Action instruction can be run as a bulk macro. You must have the Run Macros on Multiple Records user permission to run bulk macros.</p>	Yes

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Community Publisher Actions Supported in Macros

These actions are available when you click **Select Community Action** in the macro instructions. Community actions let you update and post to Salesforce Communities. You can create and run macros to perform these actions on the Community Publisher in the Salesforce Console for Service.

To use these actions, you must have the Community Publisher enabled in your Salesforce org and added as a console component to the case page layout.

Bulk macros are not supported on Community Publisher actions.

Table 5: Community Publisher Actions Supported in Macros

Action	Description	Supported in Bulk Macros?
Replace Body	Clears the contents of the post and replaces it with the specified text.	No
Insert into Body	Adds a QuickText or Text into the Community post, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No
Submit Action	Tells the macro to perform these instructions when someone runs this macro. A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.	No

Social Actions Supported in Macros

These actions are available when you click **Select Social Action** in the macro instructions. You can create and run macros to perform these actions on the Social Publisher in the Salesforce Console for Service.

To use these actions, you must have Social Actions enabled in your organization and added as a console component to the case feed page layout.

Bulk macros are not supported on Social Actions.

Table 6: Social Actions Supported in Macros

Action	Description	Supported in Bulk Macros?
Replace Content	Clears the contents of the text field and replaces it with the specified text.	No
Insert into Content	Adds the specified text to the text field, but does not delete any existing text already there. The QuickText or Text is inserted at the cursor position.	No

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Action	Description	Supported in Bulk Macros?
Set Message Type	<p>Tells the macro to use the selected message type.</p> <p>Facebook message types:</p> <ul style="list-style-type: none"> • Post • Comment • Private <p>Twitter message types:</p> <ul style="list-style-type: none"> • Tweet • Retweet • Reply • Direct 	No
Submit Action	<p>Tells the macro to perform these instructions when someone runs this macro.</p> <p>A macro that contains a Submit Action instruction is irreversible. You must have the Manage Macros Users Can't Undo user permission to create, edit, and run macros that contain instructions for performing irreversible actions.</p>	No

Macros in Lightning Experience

Create and run macros in Lightning Experience to resolve cases more efficiently in Lightning apps. In Lightning Experience, macros are supported on standard and custom objects that allow quick actions and have a customizable page layout.

IN THIS SECTION:

[Create Macros in Lightning Experience](#)

Macros give you the power to automate common repetitive tasks and resolve issues with a single click. To create macros in Lightning Experience, use the Macro Builder—an easy to use point-and-click builder.

[Macros Considerations in Lightning Experience](#)

Learn how macros functionality can impact you and your users in Lightning Experience.

SEE ALSO:

[Prerequisites for Macros](#)

[Keyboard Shortcuts for Macros](#)

[Macros Utility for Lightning Apps](#)

EDITIONS

Available in: Lightning Experience

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

Create Macros in Lightning Experience

Macros give you the power to automate common repetitive tasks and resolve issues with a single click. To create macros in Lightning Experience, use the Macro Builder—an easy to use point-and-click builder.

Important: Before you create a macro, make sure that your org meets the prerequisites. To create macros, your admin must add the Macro utility to your Lightning app.

In Lightning Experience, macros are supported on standard and custom objects that allow quick actions and have a customizable page layout.

Follow these steps to create a macro in Lightning Experience.

1. Create a macro.

- a. From your Lightning app, open a record.
- b. Click **Macros** in the utility bar.
- c. Click **+** or **Create Macro**.

Note: If you see the message "This page doesn't support macros" in the utility, double check that you're on the record page for a supported object. You can't run macros on list views.

- d. Enter a name, description, and select the object that the macro applies to.

For Macro Name, use a name that makes it easy to understand what this macro does. For example, for a macro that replaces the email subject with a critical update, enter "Replace Email Subject with Critical Update."

For Description, explain the purpose for this macro. This optional field helps other agents understand what this macro does and distinguishes it from similar macros.

The Apply To value defaults to the object you were viewing before. Change this default to create a macro for a different object.

- e. Click **Save**

2. Add instructions for the macro.

The first instruction is automatically added based on the object you selected from the Apply To field.

- a. Click **Edit Instructions**.

The Macro Builder page opens. The left side of the page displays a canvas with a sample record page for the object you selected (1). The right side of the page includes an Instructions tab and Details tab for your macro (2).

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To view macros:

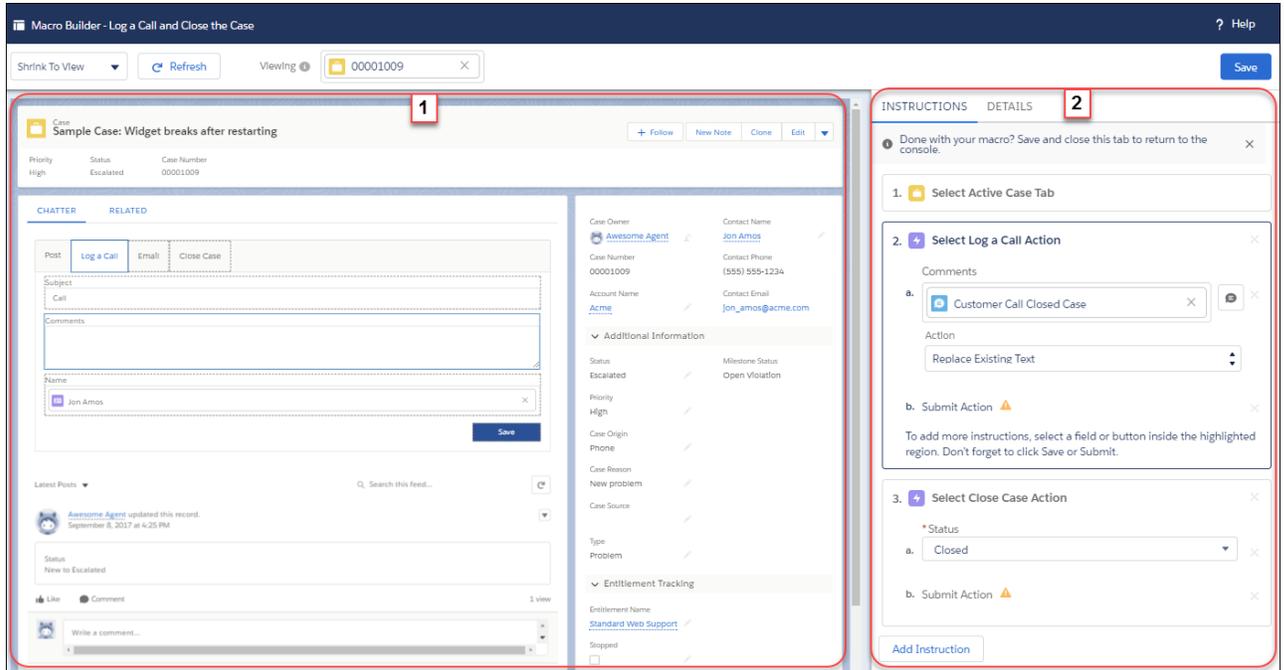
- "Read" on Macros

To create and edit macros:

- "Create" and "Edit" on Macros

To create and run irreversible macros:

- "Manage Macros That Users Can't Undo"



- b. On the canvas, select a quick action.
Selectable items are highlighted on the canvas.
For example, on a case record, you can click **Log A Call** in the publisher.
- c. On the canvas, click a field to add instructions. In the Instructions tab, enter your field updates.
 -  **Tip:** You can insert quick text, use email templates, add email attachments, and more.
 Continue to add instructions as necessary.
- d. Optionally, on the canvas, select a submit action to tell the macro to execute these instructions.
For example, to have your macro submit your Log a Call comments, click **Save** in the publisher.

3. When you're done with your macro, click **Save**. To return to the app, close the Macro Builder tab.

-  **Tip:** After you create a macro, it's a good idea to run it to make sure that it works the way you want. Open the Macro utility to execute your new macro.

SEE ALSO:

- [Add and Replace Field Values in a Case Using Macros](#)
- [Considerations for Using Your Classic Email Templates in Lightning Experience](#)
- [Keyboard Shortcuts for Macros](#)

Macros Considerations in Lightning Experience

Learn how macros functionality can impact you and your users in Lightning Experience.

Keep these things in mind when creating and using macros.

General Considerations

-  **Important:** Macros created in Salesforce Classic display in the macro utility in Lightning Experience only when their object and macro instructions are supported in Lightning Experience. For example, a macro created in Salesforce Classic that attaches a Knowledge article to a case email doesn't display in the macro utility in Lightning Experience because Knowledge articles aren't supported yet. However, a macro created in Salesforce Classic that Logs a Call on a case does display in the macro utility in Lightning Experience. Likewise, macros created in Lightning Experience that include instructions that are only available in Lightning Experience, can't be used in Salesforce Classic.

Macros in Lightning Experience work on all objects that allow quick actions and have a customizable page layout. However, we recommend that you don't use macros with the following items.

- Read-only fields
- Encrypted fields
- Opportunity products
- Knowledge articles
- Crew Size field on the Service Crew object
- Social quick action in the case feed publisher provided with Social Customer Service

Macros in Lightning Experience don't support:

- Bulk macros
- Email message object (not to be confused with the Email action, because macros work fine there)

Considerations for Creating and Working with Macros

- Macros are a standard object. If your org has org-wide public sharing, all macros are shared. If org-wide sharing is private, macros can be shared with groups, roles, and users manually.
-  **Note:** You can only share macros in Salesforce Classic or the API. Macros in Lightning Experience are either private or public (with read and write permissions), and can't be shared.
- In most text fields, you can insert up to 4,000 characters. Some text fields, like Text Area, have smaller character limits.
- If you use quick text in text fields, keep in mind that quick text channels aren't observed in macros. For example, let's say you set up quick text to be used only on one channel, such as email. When the quick text is in a macro, it can also be used on actions like Log A Call.
- You can apply more than one email template. For example, you can use the Subject of one email template and the Body of another. If an email template is updated, the macro uses the updated template.
- Macros that apply Lightning email templates that use Handlebars Merge Language (HML) syntax can't be used in Salesforce Classic.
- You can attach files to emails in your macro. Keep in mind that Salesforce has two types of attachments: ones uploaded in Salesforce Classic and ones uploaded in Lightning Experience. If the attachment was uploaded in Salesforce Classic, add it to a Salesforce Classic template and then apply that template to the macro. The same applies to Lightning Experience. Add the attachment to a Lightning email template, or simply click **Insert Attachment**.
- Before using macros created with Insert at Cursor actions, remember to initialize the cursor where you want the text added. If not, the macro inserts at the beginning of the field.

EDITIONS

Available in: Lightning Experience

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

Keyboard Shortcuts for Macros

Use keyboard shortcuts to work even more efficiently with macros.

Macro Utility Shortcuts in Lightning Experience

Command	Description	Shortcut
Open and close Macro utility	Opens and closes the macro utility.	M
Run macro	Use this shortcut when a macro is selected in the list or your search results only return one item.	Enter
Navigate list of macros	Use this shortcut when your focus is on the search bar to navigate the list of returned macros.	Arrow keys

EDITIONS

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

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

Macro Builder Shortcuts in Lightning Experience

Command	Description	Shortcut
Global		
Save	Saves the macro and its instructions.	Windows: Ctrl+S macOS: Cmd+S
Display shortcut menu	Launches the shortcut menu.	Windows: Ctrl+/ macOS: Cmd+/
Switch panel focus	Switches focus between the panels in Macro Builder. Focus moves from the title bar, the toolbar, the canvas, and the Instruction panel.	F6
Canvas		
Select focused element	Selects the focused element.	Spacebar or Enter
Switch focus to next element	Switches focus to the next element on the Macro Builder page.	Tab
Switch focus to previous element	Switches focus to previous element on the Macro Builder page.	Shift+Tab
Instructions		
Switch focus to next instruction	Switches focus to the next instruction on the page. Your focus must be on an instruction in the Instruction panel to use to shortcut.	Tab or Arrow keys

Macro Shortcuts in Salesforce Classic

Command	Description	Shortcut
Open Macro widget	Opens the Macro widget in your console app.	M
Go to macro search	Moves the cursor to the search bar in the macro widget.	S
Edit macro	Edit the selected macro.	E
View macro	View the Macro Details page for a macro.	V
Run macro	Run the selected macro.	Enter
View macro instruction	Expands or collapses the selected macro's instruction.	Spacebar
Navigate macro list	Scroll up the macro list.	Up Arrow
	Scroll down the macro list.	Down Arrow

SEE ALSO:

[Create Macros in Salesforce Classic](#)

[Create Macros in Lightning Experience](#)

Report on Support Activity

Use support reports to track the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of cases.

You can also report on the solutions for your organization, including solution history, the languages in which solutions have been written, and whether translated solutions are out of date. If you have enabled the Self-Service portal, you can run reports to track usage of your Self-Service portal.

IN THIS SECTION:

[Monitor Support Processes](#)

After you set up your customer support automation, you can monitor article process actions, and the queues for case escalation rules and entitlements.

[Using Custom Report Types to Report on Support Activity](#)

Cases and Solutions come with a number of custom report types that you can use to track your team's work with cases and solutions.

[Tips for Effective Support Reporting](#)

You can get a lot of useful information out of your cases and solutions data if you keep a few tips and best practices in mind.

SEE ALSO:

[Set Up Service Reports](#)

[Report on Live Agent Sessions](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions** except **Database.com** (The edition determines which reports you see.)

Monitor Support Processes

After you set up your customer support automation, you can monitor article process actions, and the queues for case escalation rules and entitlements.

IN THIS SECTION:

[Monitor the Case Escalation Rule Queue](#)

When Salesforce triggers a case escalation rule that has time-dependent actions, use the escalation rule queue to view pending actions and cancel them if necessary.

[Monitor the Entitlement Process Queue](#)

When Salesforce triggers an entitlement process that has time-dependent milestone actions, use the entitlement process queue to view pending actions and cancel them, if necessary.

[Monitor Automated Article Process Actions](#)

Salesforce Knowledge users can schedule articles to be published or archived on a specific date. Use the automated-process actions queue to view these pending actions and cancel them if necessary.

Monitor the Case Escalation Rule Queue

When Salesforce triggers a case escalation rule that has time-dependent actions, use the escalation rule queue to view pending actions and cancel them if necessary.

To view pending actions:

1. From Setup, enter *Case Escalations* in the **Quick Find** box, then select **Case Escalations**.
2. Click **Search** to view all pending actions for any active case escalation rule, or set the filter criteria and click **Search** to view only the pending actions that match the criteria. The filter options are:

Case To Escalate

The **Case Number** of the escalated case. The **Case Number** is a unique, automatically generated number used for identifying the case.

Escalation Rule

The name of the rule used to escalate the case.

Rule Entry

The order in which the rule entry will be processed. A rule entry is a condition that determines how a case escalation rule is processed. Each escalation rule can have a maximum of 3000 rule entries.

Escalation Action

The time criteria specified for the case to escalate as defined in the rule entry.

Ignore Business Hours

Indicates if the **Ignore Business Hours** checkbox is selected on the rule entry, meaning that the rule entry is in effect at all times and ignores your organization's business hours.

Escalate At

The date and time at which the case will escalate as defined in the rule entry. Dates and times display in the time zone of the user viewing the escalation rule queue.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To manage the case escalation rule queue:

- **Modify All Data**

Added Date

The date and time at which the case was added to the queue. Dates and times display in the time zone of the user viewing the escalation rule queue.

The filter is not case-sensitive.

To cancel pending actions:

1. Select the box next to the pending actions you want to cancel.
2. Click **Delete**. Salesforce cancels the pending action.

SEE ALSO:

[Set Up Escalation Rules](#)

[Escalation Rule Examples and Best Practices](#)

Monitor the Entitlement Process Queue

When Salesforce triggers an entitlement process that has time-dependent milestone actions, use the entitlement process queue to view pending actions and cancel them, if necessary.

To view pending actions:

1. From Setup, enter *Entitlement Processes* in the **Quick Find** box, then select **Entitlement Processes**.
2. Click **Search** to view all pending actions for any active workflow rules, or set the filter criteria and click **Search** to view only the pending actions that match the criteria. The filter options are:

Entitlement Process Name

The entitlement process.

Case Number

The case's automatically generated identifying number.

Milestone Name

The milestone that triggered the action.

Evaluation Date

The date the evaluated actions are scheduled to occur.

Created Date

The creation date of the case that triggered the entitlement process.

Username

The user who updated the case to trigger an entitlement process.

The filter is not case-sensitive.

To cancel pending actions:

1. Select the box next to the pending actions you want to cancel.
2. Click **Delete**.

EDITIONS

Available in: Salesforce Classic

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

Entitlement process monitoring is not available in Professional Edition orgs.

USER PERMISSIONS

To manage the entitlement process queue:

- **Modify All Data**

Monitor Automated Article Process Actions

Salesforce Knowledge users can schedule articles to be published or archived on a specific date. Use the automated-process actions queue to view these pending actions and cancel them if necessary.

1. From Setup, enter *Automated Process Actions* in the Quick Find box, then select **Automated Process Actions**.
2. Click **Search** to view all pending actions for any article, or set the filter criteria and click **Search** to view only the pending actions that match the criteria.

The filter options are:

Process Definition

The process that is triggering the action. This value is always "KBWorkflow."

Object

The object that triggered the pending action. This value is always "Knowledge Article."

Scheduled Date

The date the pending actions are scheduled to occur.

Create Date

The date the article that triggered the pending action was created.

Created By

The user who created the article that triggered the pending action.

Record Name

The name of the article that triggered the pending action.

The filter is not case-sensitive.

To cancel pending actions, select the box next to the pending actions you want to cancel and click **Delete**.

Using Custom Report Types to Report on Support Activity

Cases and Solutions come with a number of custom report types that you can use to track your team's work with cases and solutions.

Use the built-in custom report types to create reports on the number of cases created, case comments, case emails, case owners, case contact roles, cases with solutions, the length of time since the case last changed status or owner, and the history of case fields.

You can also report on your organization's solutions, including solution history, the languages in which solutions have been written, and whether translated solutions are out of date.

Some custom report types become available only when you enable their related features. For example, when you enable historical trend reporting for Cases, you automatically get a Cases with Historical Trending custom report type.

Cases with Historical Trending

Use the Cases with Historical Trending custom report type to analyze changes in case data over time. Available when Historical Trend Reporting is enabled.

Cases and Emails

Create a custom report to view a list of both inbound and outbound emails by case by choosing the Cases and Emails report type. This type of report is available when Email-to-Case or On-Demand Email-to-Case is enabled.

Translated Solutions

Choose the Translated Solutions report to summarize the translated solutions associated with each master solution.

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To manage automated-process actions:

- **Modify All Data**

Contact Role

Choose the Contact Role report to show all cases with their associated contact roles.

Cases with Articles

Choose the Cases with Articles report to see the articles attached to cases. This report is available if Salesforce Knowledge is enabled.

The report displays articles even if they're not marked as available for the internal app channel.

Case Lifecycle

Run case lifecycle reports to view the results of the `Range` field, which indicates the length of time since the case last changed status or owner. Each time the status or owner changes, the counter begins again at zero.

Service Contracts with Entitlements

Use the Service Contracts with Entitlements report type to report on the services your customers are entitled to. Available when Service Contracts with Entitlements is enabled.

Accounts with Entitlements with Contacts

Lists accounts with entitlements that include contacts (named callers). Available when Service Contracts with Entitlements is enabled.

Service Contracts with Contract Line Items

Lists service contracts with contract line items (products). Available when Service Contracts with Contract Line Items and Entitlements is enabled

Cases with Milestones

You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. This report type is available if entitlements is enabled.



Note: Milestone status in list views and reports is based on the related entitlement process' end time. If a user's profile doesn't include access to the `Entitlement Process End Time` case field, reports and list views that they view may show an incorrect milestone status on cases. The case record and Case Milestones related list will still display the correct milestone status values.

Case History/Solution History

Use the Case History and Solution History report types to track the history of standard and custom fields on cases and solutions where field histories are set up for tracking. Use these reports to see tracked fields' old and new values. You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.

Entitlements and Contracts

Use custom report types to define report criteria from which users can run and create reports on entitlements, service contracts, and contract line items. After entitlement management is enabled, Salesforce automatically includes the following custom report types:

Custom Report Type	Description	Report Type Location
Accounts with entitlements with contacts	Lists accounts with entitlements that include contacts (named callers).	Accounts & Contacts
Service contracts with contract line items	Lists service contracts with contract line items (products).	Customer Support Reports
Service contracts with entitlements	Lists service contracts with entitlements.	Customer Support Reports

Tips for Effective Support Reporting

You can get a lot of useful information out of your cases and solutions data if you keep a few tips and best practices in mind.

- When reporting on cases, add the `Parent Case Number` field to your report. This field indicates if a case is associated with a parent case.
- When reporting on first-call resolution of cases, add the `Closed When Created` field to your report. This field indicates cases that were closed by support reps via the **Save & Close** button during the creation of the case.
- You can create a case report containing contact email addresses, export that data to Excel, and then do a mass mail merge using Microsoft Word.

Standard Report Types

- Choose the Translated Solutions report to summarize the translated solutions associated with each master solution.
- Choose the Contact Role report to show all cases with their associated contact roles.
- Choose the Cases with Articles report to see the articles attached to cases. This report is only available if Salesforce Knowledge is enabled.

The report displays articles even if they're not marked as available for the internal app channel.

Custom Report Types

- You can create a custom report to view a list of cases with milestones by choosing the Cases with Milestones report type. This report type is only available if entitlements is enabled.
- Choose the Case History and Solution History report types to track the history of standard and custom fields on cases and solutions where field histories are set up for tracking. Use these reports to see tracked fields' old and new values. You can't use filter conditions to search the results of the `Old Value` and `New Value` fields.
- You can create a custom report to view a list of both inbound and outbound emails by case by choosing the Cases and Emails report type. This type of report is only available to organizations with Email-to-Case or On-Demand Email-to-Case enabled.
- You can run case lifecycle reports to view the results of the `Range` field, which indicates the length of time since the case last changed status or owner. Each time the status or owner changes, the counter begins again at zero.

Cases in Portals

If you have enabled the Self-Service portal, you can run reports to track usage of your Self-Service portal.

- When reporting on case comments, use the `Public Case Commented` field to indicate if the comment is private or public. Public comments are indicated with a check mark. To limit report results to public comments, customize the report and add a field filter where `Public Case Commented equals True`. Likewise, the filter `Public Case Commented equals 0` yields only private case comments.
- Choose the `Closed by Self-Service User` field to report on how many cases have been closed by users via suggested solutions on the Self-Service portal.

Solution Categories

Create a custom report that sorts solutions by category. Select the `Category Name` field to display the solution's category and the `Parent Category Name` field to display the category directly above the solution's category.

- If you restrict your report to solutions in a particular category, the report includes only solutions that are directly associated with that category. It does not include solutions in subcategories of the specified category.
- To report on uncategorized solutions, use the advanced report filters. Choose the `Category Name` field and the "equals" operator, and leave the third field blank.

Team Members

- You can report on case teams in which you are a member. After you run a case report, select `My case team's cases` from the `Show` drop-down.
- `Owner Role` for case reports is defined differently than for other objects. For most objects, `Owner Role` is defined in the `Role Name as displayed on reports` field on the user's role. Cases uses the `Label` field instead.
- You can limit any case report to cases owned by users or cases in queues. Choose `User Owned Cases` or `Queue Owned Cases` from the `View` drop-down at the top of a case report.

Service Cloud Channels

Service Cloud's support channels offer many ways—phone, email, web chat, social network channels, and more—that your customers can use to contact you. Today's customers are used to being digitally connected and easily communicating with their friends, families, and coworkers. They expect the same from the companies they do business with. Make it easier for customers to connect with your company how and when they want. Set up a mix of channels based on your business needs and customer preferences.

Manage all customer communications in one place—the Service Console—so it's easy for agents to follow your business practices and help customers no matter how customers contact you. You can route customer inquiries to agents with Omni-Channel, so your company can use the same business logic to route customer communications regardless of the channel.

Table 7: Available Channels and Main Use Cases

Customer Channel	Main Use Case	What to Implement
Phone	Customers call you on the phone to talk with support agents. Agents can create cases.	Open CTI (Computer-Telephone Integration) and Call Centers
Email	Customers send emails to you. The emails are turned into cases.	Email-to-Case
Web form	Customers fill out a form on your website and submit it. The forms turn into cases.	Web-to-Case
Web chat	Customers chat with agents on your website. Create cases from chats.	Live Agent and Snap-ins Chat
Mobile in-app chat	Embed customer service into your mobile and web apps, so customers can chat with agents and get help quickly and easily. Create cases from chats.	Snap-ins Chat
Social Media Networks <ul style="list-style-type: none"> • Facebook • Google+ (pilot) • Instagram • Sina Weibo (pilot) • Twitter 	Customers can post on your company's social network page, and they can at-mention your company on the social network. You can create cases from posts and reply to posts.	Social Customer Service
Video chat	Customers can talk face-to-face with agents through a video feed. Agents also can co-browse a website with customers and show customers exactly what to look for.	SOS
Community	Customers can collaborate and resolve their inquiries without contacting a customer representative.	Communities

Phone from a Call Center

Let customers call you on the phone. Use Open CTI to connect your existing phone system to Salesforce, then use the Call Center to set it all up.

IN THIS SECTION:

[Salesforce Open CTI](#)

Open CTI is a JavaScript API that lets you build and integrate third-party computer-telephony integration (CTI) systems with Salesforce Call Center. To display CTI functionality in Salesforce, Open CTI uses browsers as clients. With Open CTI, you can make calls from a softphone directly in Salesforce without installing CTI adapters on your machines.

[Salesforce Call Center](#)

Call Center integrates Salesforce with third-party computer-telephony integration (CTI) systems. Call center users can see Salesforce information for incoming calls, make out-going calls directly from Salesforce, and report on call outcome, duration, and more. A call center is great for boosting productivity for Salesforce users that spend time on the phone.

[Set Up a Call Center](#)

Before Salesforce users can access and use a call center, an administrator must complete various tasks.

[Creating a Call Center](#)

There are two ways to create a call center record in Salesforce—importing or cloning.

[Managing Call Centers](#)

After you set up a call center, you can update the call center settings as your business needs change.

[Managing Call Center Users](#)

To let users make calls, add them to your call center.

[Call Customers on the Phone](#)

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

Salesforce Open CTI

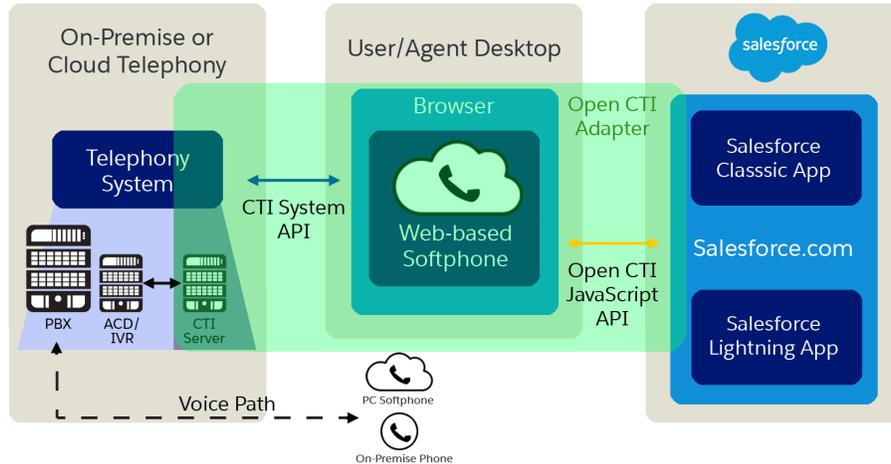
Open CTI is a JavaScript API that lets you build and integrate third-party computer-telephony integration (CTI) systems with Salesforce Call Center. To display CTI functionality in Salesforce, Open CTI uses browsers as clients. With Open CTI, you can make calls from a softphone directly in Salesforce without installing CTI adapters on your machines.

Here's how Open CTI connects to your telephony system.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



Note: The way you implement Open CTI depends on your org's user interface. There are separate Open CTI APIs for Salesforce Classic and Lightning Experience. You can't swap the two Open CTI APIs in custom JavaScript code because they behave and function differently. Make sure that you think about where you want to implement your CTI system before you begin developing.

Before the introduction of Open CTI, Salesforce users could only use the features of a CTI system after they installed a CTI adapter program on their machines. These types of programs often included desktop software that required maintenance and didn't offer the benefits of cloud architecture.

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](#).

Typically, CTI vendors or partners create Open CTI implementations. After you have an Open CTI implementation, it's integrated with Salesforce using the Salesforce Call Center. Keep in mind that the out-of-the-box Service app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, use Open CTI for Lightning Experience in a Lightning Experience app, like our out-of-the-box Service Console app.

CTI vendors and partners use Open CTI in JavaScript to embed API calls and processes. With Open CTI vendors and partners can:

- Build CTI systems that integrate with Salesforce without the use of CTI adapters.
- Create customizable softphones (call-control tools) that function as fully integrated parts of Salesforce and the Salesforce console.
- Provide users with CTI systems that are browser and platform agnostic, for example, CTI for Microsoft® Internet Explorer®, Mozilla® Firefox®, Apple® Safari®, or Google Chrome™ on Mac, Linux, or Windows machines.

SEE ALSO:

[Open CTI Developer Guide](#)

[Salesforce Call Center](#)

[Supported Browsers](#)

Salesforce Call Center

Call Center integrates Salesforce with third-party computer-telephony integration (CTI) systems. Call center users can see Salesforce information for incoming calls, make out-going calls directly from Salesforce, and report on call outcome, duration, and more. A call center is great for boosting productivity for Salesforce users that spend time on the phone.

 **Note:** Keep in mind that the out-of-the-box Service app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, use Open CTI for Lightning Experience in a Lightning Experience app, like our out-of-the-box Service Console app.

To set up a call center, work with a developer or partner to create a CTI implementation that uses the Open CTI API and works with your existing telephony system. Most call centers are created by installing an AppExchange package, then all you have to do is decide which users you want to access the call center.

After a call center is set up, call center users can make and receive calls with a softphone. Each softphone looks and behaves differently because each CTI implementation is unique. In the console and in Lightning Experience, softphones appear in a footer. In Salesforce Classic, softphones appear in the left sidebar of every Salesforce page.

The call center is all about customization. You can modify softphone layouts and assign specific layouts to selected user profiles. You can also add phone numbers to call center directories so your users all have access to key phone numbers. As your needs change, your call center can be customized and changed too. As an admin, some customization you can do yourself. However, you might want to work with your developers or partners to make functionality changes.

SEE ALSO:

[Open CTI Developer Guide](#)

[Supported Browsers](#)

[Set Up a Call Center](#)

[Creating a Call Center](#)

[Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Set Up a Call Center

Before Salesforce users can access and use a call center, an administrator must complete various tasks.

 **Note:** Keep in mind that the out-of-the-box Service app is a Salesforce Classic app and only supports Open CTI for Salesforce Classic. To make calls in Lightning Experience, use Open CTI for Lightning Experience in a Lightning Experience app, like our out-of-the-box Service Console app.

1. Work with a developer or partner to create a computer-telephony integration (CTI) implementation that uses the Open CTI API and works with your existing telephony system. Most call centers are created by installing a package from the AppExchange.

If you're developing your own implementation, [define a new call center record](#) for every CTI system in use at your business.

2. [Assign Salesforce users to the appropriate call center](#). A call center user must be associated with a call center to view the softphone.
3. Optionally, you can make further customizations.
 - [Configure call center phone directories](#) with more directory numbers and updated phone number search layouts.
 - [Customize softphone layouts](#) for different user profiles, so that the softphone of a sales person might show related leads, accounts, and opportunities, while the softphone of a support agent might show related cases and solutions.

Next, let's work on call center definition files.

IN THIS SECTION:

[Call Center Definition Files](#)

[Creating a Call Center Definition File](#)

[Importing a Call Center Definition File](#)

SEE ALSO:

[Open CTI Developer Guide](#)

Call Center Definition Files

A call center definition file specifies a set of fields and values that are used to define a call center in Salesforce for a particular CTI system. Salesforce uses call center definition files to support the integration with multiple CTI system vendors.

By default, any CTI adapter installation package includes a default call center definition file that works specifically with that adapter. This XML file is located in the adapter installation directory and is named after the CTI system that it supports. For example, the Cisco IPCC Enterprise™ adapter's default call center definition file is named `CiscoIPCCEnterprise7x.xml`.

The first instance of a call center for a particular CTI adapter must be defined by importing the call center definition into Salesforce. Subsequent call centers can be created by cloning the original call center that was created with the import.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To manage call centers, call center users, call center directories, and SoftPhone layouts:

- [Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

If your organization modifies an adapter or builds a new one, you must customize the adapter's call center definition file so that it includes any additional call center information that is required. For example, if you are building a CTI adapter for a system that supports a backup server, your call center definition file should include fields for the backup server's IP address and port number. CTI adapters for systems that do not make use of a backup server do not need those fields in their associated call center definition files.

 **Note:** Once a call center definition file has been imported into Salesforce, the set of fields that were specified in the file cannot be modified. The values assigned to those fields, however, can be changed within Salesforce.

See the following topics for information about creating and importing a call center definition file:

- To create a call center definition file for a custom CTI adapter, see [Creating a Call Center Definition File](#) on page 299.
- To view a sample call center definition file, see [Sample Call Center Definition File](#) on page 303.
- To import a call center definition file into Salesforce, see [Importing a Call Center Definition File](#) on page 305.

SEE ALSO:

- [Creating a Call Center](#)
- [Cloning a Call Center](#)
- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for <item> Elements](#)

Creating a Call Center Definition File

If you have built a custom CTI adapter, you must write a call center definition file to support it. Use a text or XML editor to define an XML file according to the guidelines outlined in the following topics:

IN THIS SECTION:

- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for <item> Elements](#)
- [Sample Call Center Definition File](#)

SEE ALSO:

- [Call Center Definition Files](#)
- [Importing a Call Center Definition File](#)
- [Cloning a Call Center](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Call Center Definition XML Format

A [call center definition file](#) consists of three XML elements: `callCenter`, `section`, and `item`. The following list provides details about the properties and attributes of each element:

callCenter

This element represents a definition for a single call center phone system. At least one `<callCenter>` element must be included in every call center definition file. A `<callCenter>` element consists of one or more `<section>` elements.

section

This element represents a grouping of related data fields, such as server information or dialing prefixes. When a call center is edited in Salesforce, fields are organized by the section to which they are assigned. A `<section>` element belongs to a single `<callCenter>` element, and consists of one or more `<item>` elements.

Attributes:

Name	Type	Required?	Description
<code>sortOrder</code>	Positive Integer	Required	<p>The order in which the section should appear when the call center is edited in Salesforce. For example, a section with <code>sortOrder="1"</code> comes just before a section with <code>sortOrder="2"</code>.</p> <p>The values for <code>sortOrder</code> must be non-negative integers, and no numbers can be skipped within a single call center definition. For example, if there are three section elements in a call center definition file, one <code><section></code> element must have <code>sortOrder="0"</code>, one <code><section></code> element must have <code>sortOrder="1"</code>, and one <code><section></code> element must have <code>sortOrder="2"</code>.</p>
<code>name</code>	String	Required	<p>The internal name of the section as defined in the Salesforce database. You can use this value to refer to the section when writing custom adapter or SoftPhone code.</p> <p>Names must be composed of only alphanumeric characters with no white space or other punctuation. They are limited to 40 characters each.</p> <p>Names beginning with <code>req</code> are reserved for required Salesforce sections only (see Required Call Center Elements and Attributes on page 302). Other reserved words that cannot be used for the name attribute include <code>label</code>, <code>sortOrder</code>, <code>internalNameLabel</code>, and <code>displayNameLabel</code>.</p>
<code>label</code>	String	Optional	<p>The name of the section when viewed in Salesforce. Labels can be composed of any string of UTF-8 characters. They are limited to 1000 characters each.</p>

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

item

This element represents a single field in a call center definition, such as the IP address of a primary server or the dialing prefix for international calls. When call centers are edited in Salesforce, each `<item>` element is listed under the section to which it belongs. You can have multiple `<item>` elements in a `<section>` element.

Attributes:

Name	Type	Required?	Description
<code>sortOrder</code>	Positive Integer	Required	<p>The order in which the item should appear when the call center is edited in Salesforce. For example, an item with <code>sortOrder="1"</code> comes just before an item with <code>sortOrder="2"</code>.</p> <p>The values for <code>sortOrder</code> must be non-negative integers, and no numbers can be skipped within a single call center definition. For example, if there are three item elements in a call center definition file, one <code><item></code> element must have <code>sortOrder="0"</code>, one <code><item></code> element must have <code>sortOrder="1"</code>, and one <code><item></code> element must have <code>sortOrder="2"</code>.</p>
<code>name</code>	String	Required	<p>The internal name of the item as defined in the Salesforce database. You can use this value to refer to the item when writing custom adapter or SoftPhone code.</p> <p>Names must be composed of only alphanumeric characters with no white space or other punctuation. They are limited to 40 characters each.</p> <p>Names beginning with <code>req</code> are reserved for required Salesforce sections only (see Required Call Center Elements and Attributes on page 302). Other reserved words that cannot be used for the <code>name</code> attribute include <code>label</code>, <code>sortOrder</code>, <code>internalNameLabel</code>, and <code>displayNameLabel</code>.</p>
<code>label</code>	String	Optional	<p>The name of the item when viewed in Salesforce. Labels can be composed of any string of UTF-8 characters. They are limited to 1,000 characters each.</p>

SEE ALSO:

[Creating a Call Center](#)

[Call Center Definition XML Format](#)

[Creating a Call Center Definition File](#)

[Required Call Center Elements and Attributes](#)

[Specifying Values for `<item>` Elements](#)

[Sample Call Center Definition File](#)

Required Call Center Elements and Attributes

There must be one `<section>` that includes `<item>` elements with the following names in every [call center definition file](#):

<code><item></code> Name	Description
<code>reqInternalName</code>	Represents the unique identifier for the call center in the database. It must have a <code>sortOrder</code> value of 0, and its value must be specified in the call center definition (see Specifying Values for <code><item></code> Elements on page 302). A value for <code>reqInternalName</code> must be composed of no more than 40 alphanumeric characters with no white space or other punctuation. It must start with an alphabetic character and must be unique from the <code>reqInternalName</code> of all other call centers defined in your organization.
<code>reqDisplayName</code>	Represents the name of the call center as displayed in Salesforce. It must have a <code>sortOrder</code> value of 1. A value for <code>reqDisplayName</code> has a maximum length of 1,000 UTF-8 characters.
<code>reqDescription</code>	Represents a description of the call center. A value for <code>reqDescription</code> has a maximum length of 1,000 UTF-8 characters.

You can add additional `<item>` elements to this section if needed.

SEE ALSO:

- [Creating a Call Center](#)
- [Creating a Call Center Definition File](#)
- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for `<item>` Elements](#)
- [Sample Call Center Definition File](#)

Specifying Values for `<item>` Elements

With the exception of the `reqInternalName` `<item>`, whose value must always be specified in a [call center definition file](#), you can specify `<item>` values either in the call center definition file or in Salesforce once the definition file has been imported.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

To specify a value for an `<item>` element in a call center definition file, place the value between the opening and closing tags of the `<item>`. For example:

```
<item sortOrder="0" name="reqInternalName" label="Call Center Internal
Label">MyCallCenter</item>
```

sets the value of the `reqInternalName` `<item>` to `MyCallCenter`. Note that any `<item>` value other than the value for `reqInternalName` can be edited in Salesforce after the call center definition is imported.

SEE ALSO:

[Creating a Call Center](#)

[Call Center Definition XML Format](#)

[Creating a Call Center Definition File](#)

[Required Call Center Elements and Attributes](#)

[Sample Call Center Definition File](#)

Sample Call Center Definition File

The following XML code makes up a sample [call center definition file](#). For more information on the XML format of a call center definition file, see [Creating a Call Center Definition File](#) on page 299.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

```
<!--
  All sections and items whose name value begins with "req" are
  required in a valid call center definition file. The sortOrder
  and label attributes can be changed for all required sections
  and items except reqGeneralInfo, reqInternalName, and
  reqDisplayName, in which only the label attribute can be altered.

  Note that the value for the reqInternalName item is limited to
  40 alphanumeric characters and must start with an alphabetic
  character. reqInternalName must be unique for all call centers
  that you define.
-->

<callCenter>

<section sortOrder="0" name="reqGeneralInfo" label="General Info">
  <item sortOrder="0" name="reqInternalName"
    label="Internal Name">callCenter001</item>
  <item sortOrder="1" name="reqDisplayName"
    label="Display Name">My Call Center</item>
```

```
<item sortOrder="2" name="reqDescription"
  label="Description">Located in San Francisco, CA</item>
<item sortOrder="3" name="reqProgId"
  label="CTI Connector ProgId">MyAdapter.MyAdapter.1</item>
<item sortOrder="4" name="reqVersion"
  label="Version">4.0</item>
<item sortOrder="5" name="reqAdapterUrl"
  label="CTI Adapter URL">http://localhost:11000</item>
</section>

<section sortOrder="1" name="ServerInfo" label="CTI Server Info">
  <item sortOrder="0" name="HostA"
    label="Host A">Host A</item>
  <item sortOrder="1" name="PortA"
    label="Port A">Port A</item>
  <item sortOrder="2" name="HostB"
    label="Host B">Host B</item>
  <item sortOrder="3" name="PortB"
    label="Port B">Port B</item>
  <item sortOrder="4" name="PeripheralID"
    label="Peripheral ID">1000</item>
</section>

<section sortOrder="2" name="DialingOptions" label="Dialing Options">
  <item sortOrder="0" name="OutsidePrefix"
    label="Outside Prefix">1</item>
  <item sortOrder="1" name="LongDistPrefix"
    label="Long Distance Prefix">9</item>
  <item sortOrder="2" name="InternationalPrefix"
    label="International Prefix">01</item>
</section>

</callCenter>
```

SEE ALSO:

- [Creating a Call Center](#)
- [Creating a Call Center Definition File](#)
- [Call Center Definition XML Format](#)
- [Required Call Center Elements and Attributes](#)
- [Specifying Values for <item> Elements](#)

Importing a Call Center Definition File

To create your first call center for a CTI adapter that was just installed, you can import the adapter's default [call center definition file](#) into Salesforce:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click **Import**.
3. Next to the **Call Center Definition File** field, click **Browse** to navigate to the default call center definition file in your CTI adapter installation directory. This XML file is named after the type of CTI system that the adapter supports. For example, the Cisco™ IPCC Enterprise adapter's default call center definition file is named `CiscoIPCCEnterprise7x.xml`. Click **Open** to enter the path in the **Call Center Definition File** field.
4. Click **Import** to import the file and return to the All Call Centers page. The new call center record is listed with the other call centers in your organization.

 **Note:** If you receive the error *A call center with this internal name already exists*, a call center definition file for this CTI adapter has already been imported into Salesforce. To create additional call center records for this CTI adapter, [clone the adapter's existing call center](#), or [modify the call center definition file](#) to include a different value for `reqInternalName`.

5. Click **Edit** next to the name of the new call center to modify the call center's settings.

To create additional call centers for a particular CTI adapter, see [Cloning a Call Center](#) on page 306.

To define a new call center definition file for a CTI adapter that was customized specifically for your organization, see [Creating a Call Center Definition File](#) on page 299.

SEE ALSO:

[Creating a Call Center](#)

[Managing Call Centers](#)

Creating a Call Center

There are two ways to create a call center record in Salesforce—importing or cloning.

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

To create a call center record in Salesforce:

- [Import a call center definition file into Salesforce](#). Use this method to create your first call center for a CTI adapter that was just installed.
- [Clone an existing call center definition](#). Use this method to create additional call centers for a particular CTI adapter. For example, if you already have a call center record for a Cisco IPCC Enterprise™ call center based in one location, you can clone that record for a Cisco IPCC Enterprise call center based in another location.

To view a list of call centers that have already been created, from Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To import call center definition files:

- [Customize Application AND Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create a call center by importing or cloning:

- [Manage Call Centers](#)

IN THIS SECTION:

- [Cloning a Call Center](#)
- [Displaying and Editing a Call Center](#)
- [Customizing a Call Center Directory](#)
- [Adding a Number to a Call Center Directory](#)
- [Customizing Softphone Layouts](#)

SEE ALSO:

[Open CTI Developer Guide](#)

Cloning a Call Center

To create more than one call center for a particular CTI adapter, you can clone an existing one. For example, if you already have a call center record for a Cisco IPCC Enterprise™ call center based in one location, you can clone that record for a Cisco IPCC Enterprise call center based in another location.

To clone a call center:

1. From Setup, enter *Call Centers* in the Quick Find box, then select **Call Centers**.
2. Click the name of the call center that you want to clone.
3. Click **Clone**. This action opens a new call center for editing with the same fields and values as the original call center. Only the `Internal Name` field is left intentionally blank to allow you to provide a new name. The `Internal Name` field is limited to 40 alphanumeric characters and must start with an alphabetic character. `Internal Name` must be unique for every call center defined in your organization. For more information, see [Call Center Fields](#) on page 313.
4. Make any additional changes to the new call center as necessary.
5. Click **Save** to save the new call center, or click **Cancel** to return to the All Call Centers page without saving the cloned call center.

 **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

- [Set Up a Call Center](#)
- [Creating a Call Center](#)
- [Managing Call Centers](#)
- [Displaying and Editing a Call Center](#)
- [Importing a Call Center Definition File](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view and clone a call center:

- [Manage Call Centers](#)

Displaying and Editing a Call Center

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

To view call center details:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center that you want to view.

From the Call Center Detail page you can:

- Click **Edit** to modify the properties of the call center.
- Click **Delete** to erase the call center record from Salesforce. When you delete a call center, all associated [directory numbers](#) are also deleted. Any users associated with the call center must be reassigned to another call center to continue using Salesforce CRM Call Center features .
- Click **Clone** to [create a duplicate copy of the call center](#) with the same fields and values as the current call center.
- Click **Manage Call Center Users** to [designate Salesforce users as members of this call center](#).

 **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:

[Open CTI Developer Guide](#)

[Creating a Call Center](#)

[Managing Call Centers](#)

[Call Center Definition Files](#)

Customizing a Call Center Directory

Every call center in [Salesforce CRM Call Center](#) includes a call center directory that allows users to search for phone numbers throughout your organization. You can customize call center directories by:

- [Adding additional directory numbers](#), either to a single call center or to all defined call centers in your organization
- Updating phone number search layouts

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Managing Call Centers](#)

[Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view or edit a call center:

- [Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To manage call center directories:

- [Manage Call Centers](#)

Adding a Number to a Call Center Directory

To customize call center directories by adding additional directory numbers, either to a single call center or to all defined call centers in your organization:

1. From Setup, enter *Directory Numbers* in the **Quick Find** box, then select **Directory Numbers**. From this page, you can:
 - Click **Edit** to edit an existing additional directory number.
 - Click **Del** to delete an existing additional directory number.
 - Click the name of an existing additional directory number to view its details in the Additional Directory Number Detail page. From this page you can click **Edit** to edit the number, click **Delete** to delete it, or click **Clone** to quickly create a new additional directory number with the same information as the existing number.
2. Click **New** to define a new additional directory number.
3. In the **Name** field, enter a label that identifies the additional directory number.
4. In the **Phone** field, enter the phone number, including any international country codes. Dialing prefixes, such as 9 or 1, do not need to be included.
5. In the **Call Center** field, select the call center directory to which you want to add the new directory number. To add the number to every call center directory in your organization, choose -- Global --.
6. In the **Description** field, optionally enter text that provides further information about the additional directory number.
7. Click **Save** to save the number and return to the All Additional Directory Numbers page. Alternatively, click **Save & New** to save the number and create another.



Tip: If you have a large number of directory numbers to define, use the Data Loader to create them in one step.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Customizing a Call Center Directory](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view, add, edit, or delete an additional directory number:

- [Manage Call Centers](#)

Customizing Softphone Layouts

A softphone is a customizable call-control tool that appears to users assigned to a call center. Similar to page layouts, you can design custom softphone layouts and assign them to Call Center users based on their user profile.

IN THIS SECTION:

- [Designing a Custom Softphone Layout](#)
- [Assigning a Softphone Layout to a User Profile](#)

SEE ALSO:

- [Open CTI Developer Guide](#)
- [Set Up a Call Center](#)
- [Managing Call Centers](#)

Designing a Custom Softphone Layout

In a [softphone layout](#), you can control the call-related fields that are displayed and the Salesforce objects that are searched for an incoming call. To design a custom softphone layout:

1. From Setup, enter *Softphone Layouts* in the Quick Find box, then select **Softphone Layouts**.
2. Click **New** to create a softphone layout definition, or click **Edit** next to the name of an existing layout definition to view or modify it.
3. In the **Name** field, enter a label that uniquely identifies your softphone layout definition.
4. In the **Select Call Type** picklist, choose the type of call for which the currently displayed softphone layout should be used. Every softphone layout definition allows you to specify different layouts for inbound, outbound, and internal calls. These three layouts are grouped in a single softphone layout definition.
5. In the **Display these call-related fields** section, click **Edit** to add, remove, or change the order of fields in the currently-displayed softphone layout:
 - To add a field to the softphone layout, select it in the Available list and click **Add**.
 - To remove a field from the softphone layout, select it in the Selections list and click **Remove**.
 - To change the order of a field in the softphone layout, select it in the Selections list and click **Up** or **Down**.

Any changes that you make are automatically updated in the softphone layout preview image on the right side of the page. To hide the Available and Selections lists, click **Collapse**.

Phone-related fields only appear in a user's softphone if a valid value for that field is available. For example, if you add a Caller ID field to the layout of an outbound call, Caller ID doesn't appear.

6. In the **Display these Salesforce Objects** section, click **Add/Remove Objects** to add, remove, or change the order of links to call-related objects.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, or delete a softphone layout:

- [Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view, create, edit, or delete a softphone layout:

- [Manage Call Centers](#)

7. Below the list of selected objects, click **Edit** next to each `If single <Object> found, display` row to specify the fields that should be displayed in the softphone layout if a single record for that object is the only record found. You can add, remove, or change the order of fields.
8. In the `Screen Pop Settings` section (for inbound call types), click **Edit** next to each type of record-matching row to specify which screens should display when the details of an inbound call match or don't match existing records in Salesforce. The following table describes each record-matching row and its screen pop options:

Record-Matching Row	Description	Screen Pop Options
Screen pops open within	Use to set where screen pops display.	<p>Existing browser window Select to display in open browser windows.</p> <p>New browser window or tab Select to display in new browser windows or tabs.</p> <p>Users' browsers may handle these settings differently:</p> <ul style="list-style-type: none"> • Internet Explorer 6.0 always displays screen pops in new windows. • Internet Explorer 7.0 displays screen pops based on what users select in its tabs settings. • Firefox 3.5 displays screen pops based on what users select in its tabs settings.
No matching records	Use to set the screen pop options for when the details of an inbound call don't match any existing Salesforce records.	<p>Don't pop any screen Select if you don't want any screen to display.</p> <p>Pop to new Select to display a new record page you specify from the dropdown list.</p> <p>Pop to Visualforce page Select to display a specific Visualforce page.</p> <p>The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least <code>ANI</code> (the caller ID) and <code>DNIS</code> (the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.</p> <p>Pop to flow Select to display a specific flow. You can use active screen flows only.</p>
Single-matching record	Use to set the screen pop options for when the details of an inbound call match one existing Salesforce record.	<p>Don't pop any screen Select if you don't want any screen to display.</p> <p>Pop detail page Select to display the matching record's detail page.</p> <p>Pop to Visualforce page Select to display a specific Visualforce page.</p> <p>The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least <code>ANI</code> (the caller ID) and <code>DNIS</code></p>

Record-Matching Row	Description	Screen Pop Options
		<p>(the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.</p> <p>Pop to flow Select to display a specific flow. You can use active screen flows only.</p>
Multiple-matching records	Use to set the screen pop options for when the details of an inbound call match more than one existing Salesforce record.	<p>Don't pop any screen Select if you don't want any screen to display.</p> <p>Pop to search page Select to display a search page.</p> <p>Pop to Visualforce page Select to display a specific Visualforce page.</p> <p>The CTI adapter passes data from the call to the Visualforce page via a URL. This includes at least <code>ANI</code> (the caller ID) and <code>DNIS</code> (the number that the caller dialed). The URL can pass more data to the Visualforce page if necessary.</p> <p>Pop to flow Select to display a specific flow. You can use active screen flows only.</p>

To hide expanded record-matching rows, click **Collapse**.

9. Configure softphone layouts for any remaining call types in the `Select Call Type` picklist.

10. Click **Save**.

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

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Assigning a Softphone Layout to a User Profile](#)

Assigning a Softphone Layout to a User Profile

Once you have [defined one or more custom softphone layouts](#), you can assign them to user profiles:

1. From Setup, enter *Softphone Layouts* in the **Quick Find** box, then select **Softphone Layouts**.
2. Click **Layout Assignment**.
3. For each user profile that appears in the page, select the softphone layout that the profile should use. Profiles are only listed in this page if they include users that are currently assigned to a call center, or if they have already been assigned a custom softphone layout.
4. Click **Save**.

 **Note:** Call center users will see their newly assigned softphone layout the next time they log into Salesforce.

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Customizing Softphone Layouts](#)

Managing Call Centers

After you set up a call center, you can update the call center settings as your business needs change.

A call center in [Salesforce CRM Call Center](#) corresponds to a single computer-telephony integration (CTI) system already in place at your organization. Salesforce users must be assigned to a call center record before they can use any Salesforce CRM Call Center features.

To view a list of call centers that have already been created, from Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**. From this page, you can:

- Click the name of a call center to [view call center details](#).
- Click **Import** to [import a call center definition file](#) that you have already created.
- Click **Edit** next to any call center to [modify call center details](#).
- Click **Del** next to any call center to erase the call center record from Salesforce. When you delete a call center, all associated [directory numbers](#) are also deleted. Any users associated with the call center must be reassigned to another call center to continue using Salesforce CRM Call Center features .

IN THIS SECTION:

[Call Center Fields](#)

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Creating a Call Center](#)

[Call Center Definition Files](#)

[Managing Call Center Users](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To assign a softphone layout to a user profile:

- [Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To import, view, edit, or delete a call center:

- [Manage Call Centers](#)

Call Center Fields

All call centers include the following required fields, though additional fields may be available depending on the content of the [call center definition file](#) that was used to create the call center:

Field	Description
Internal Name	Represents the unique identifier for the call center in the database. <code>Internal Name</code> must be composed of no more than 40 alphanumeric characters with no white space or other punctuation. It must start with an alphabetic character and must be unique from the <code>Internal Name</code> of all other call centers defined in your organization. Once a value for <code>Internal Name</code> has been saved for a call center, it cannot be changed.
Display Name	Represents the name of the call center as displayed in Salesforce. It must have a <code>sortOrder</code> value of 1. <code>Display Name</code> has a maximum length of 1,000 UTF-8 characters.
Description	Represents a description of the call center. <code>Description</code> has a maximum length of 1,000 UTF-8 characters.

SEE ALSO:

- [Displaying and Editing a Call Center](#)
- [Creating a Call Center](#)
- [Managing Call Center Users](#)

Managing Call Center Users

To let users make calls, add them to your call center.

A Salesforce user cannot use a softphone unless an administrator has assigned the user to a call center.

Also keep in mind that every call center user has access to a set of [personal softphone settings](#). These settings specify:

- Whether the user should be automatically logged into his or her softphone when he or she logs into Salesforce
- How a record should be displayed when it is the only one that matches an incoming call

To change the default personal softphone settings for all new call center users, use the Lightning Platform API.

IN THIS SECTION:

- [Adding a User to a Call Center](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To add or remove users from a call center:

- [Manage Call Centers](#)

[Removing a User from a Call Center](#)

SEE ALSO:

[Open CTI Developer Guide](#)

[Set Up a Call Center](#)

[Creating a Call Center](#)

[Managing Call Centers](#)

Adding a User to a Call Center

To add a user to a call center in [Salesforce CRM Call Center](#):

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center to which you want to assign the Salesforce user.
3. In the Call Center Users related list, click **Manage Call Center Users**.
4. Click **Add More Users**.
5. Specify search criteria to find the Salesforce users who should be assigned to the call center.
6. Click **Find** to display the list of Salesforce users that meet your search criteria. All users who already belong to a call center are excluded from search results because a user can only be assigned to one call center at a time.
7. Select the checkbox next to each user who should be assigned to the call center and click **Add to Call Center**.

Alternatively, you can change a particular user's call center in the User Edit page:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to the name of the user.
3. Modify the **Call Center** field as appropriate. You can change the user's call center by clicking the lookup icon () and choosing a new call center, or you can remove the user from his or her current call center by deleting the call center name from the field.

SEE ALSO:

[Set Up a Call Center](#)

[Managing Call Center Users](#)

[Creating a Call Center](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To add users to a call center:

- [Manage Call Centers](#)

Removing a User from a Call Center

To remove a user from a call center in Salesforce CRM Call Center:

1. From Setup, enter *Call Centers* in the **Quick Find** box, then select **Call Centers**.
2. Click the name of the call center from which you want to remove the Salesforce user.
3. In the Call Center Users related list, click **Manage Call Center Users**.
4. Click **Remove** next to the name of the user that you want to remove from the call center.

To remove multiple users at once, select the **Action** checkbox next to each user you want to remove and click **Remove Users**.

Alternatively, you can change a particular user's call center in the User Edit page:

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to the name of the user.
3. Modify the **Call Center** field as appropriate. You can change the user's call center by clicking the lookup icon (🔍) and choosing a new call center, or you can remove the user from his or her current call center by deleting the call center name from the field.

SEE ALSO:

- [Set Up a Call Center](#)
- [Managing Call Center Users](#)
- [Creating a Call Center](#)

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?](#)
- [Answer a Call Using a Softphone](#)
- [Making a Call Using the Softphone](#)
- [Get to Know Your Softphone Features](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To remove users from a call center:

- [Manage Call Centers](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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:

- [Salesforce Call Center](#)
- [Salesforce Console](#)
- [Get to Know Your Softphone Features](#)
- [Use a Softphone in the Salesforce Console in Salesforce Classic](#)

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.

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		

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To answer calls with a softphone:

- Member of a call center

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

IN THIS SECTION:

- [Creating Call Logs in the Softphone](#)
- [Putting a Caller on Hold Using the Softphone](#)
- [Transferring a Call Using the Softphone](#)
- [Making a Conference Call Using the Softphone](#)
- [Wrapping Up a Call Using the Softphone](#)

SEE ALSO:

- [Get to Know Your Softphone Features](#)
- [Changing Your Call Center State](#)

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create a call log:

- Member of a call center

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.
- 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](#)

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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) 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 can 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:

[Salesforce Call Center](#)

[Get to Know Your Softphone Features](#)

[Wrapping Up a Call Using the Softphone](#)

[Creating Call Logs in the Softphone](#)

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 can 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 (**not available in all orgs**) and Lightning Experience

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

USER PERMISSIONS

To transfer a call:

- Member of a call center

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) 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:

- [Salesforce Call Center](#)
- [Get to Know Your Softphone Features](#)
- [Putting a Caller on Hold Using the 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:

- [Salesforce Call Center](#)
- [Get to Know Your Softphone Features](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To end a call:

- Member of a call center

Making a Call Using the Softphone

In [Salesforce CRM Call Center](#) there are three ways to make a call:

- Dial a number manually
- Use the call center directory
- Use 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 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 can 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](#)
- [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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) 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 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](#)

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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To make a call:

- Member of a call center

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) 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 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](#)

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.

SEE ALSO:

- [Salesforce Call Center](#)
- [Use a Softphone in the Salesforce Console in Salesforce Classic](#)
- [Wrapping Up a Call Using the Softphone](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To make a call:

- Member of a call center

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view and use a softphone:

- Member of a call center

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](#)

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To log in to Salesforce CRM Call Center:

- Member of a call center

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To change your call center state:

- Member of a call center

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](#)

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: <ul style="list-style-type: none"> • 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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To edit personal softphone settings:

- Member of a call center

Setting**Description**

must click on the record's link in the softphone.

SEE ALSO:

[Salesforce Call Center](#)

[Get to Know Your Softphone Features](#)

[Logging In to the 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:

[Salesforce Call Center](#)

[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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To use a call center directory:

- Member of a call center

Provide Web Forms with Web-to-Case

Let customers submit support requests on your website. Use Web-to-Case to gather support inquiries and turn them into cases. Web-to-Case can help your organization respond to customers faster, improving your support team's productivity.

Generate up to 5,000 cases per day.

IN THIS SECTION:

[Web-to-Case Prerequisites](#)

Before setting up Web-to-Case, complete the following prerequisites.

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

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

[Generate Web-to-Case HTML Code](#)

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

[Enable reCAPTCHA to Prevent Spam Cases](#)

Enable reCAPTCHA in Web-to-Case to make it easy for customers to contact your company while making it difficult for spambots to waste service representatives' time. Enabling reCAPTCHA is optional.

[Web-to-Case Notes and Limitations](#)

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

[Web-to-Case FAQ](#)

Review frequently asked questions for Web-to-Case.

Web-to-Case Prerequisites

Before setting up Web-to-Case, complete the following prerequisites.

- Create custom case fields, if needed.
- Create a default email template for the automated notification that is sent to your customers when they submit a case.
- Create case queues if you wish to assign incoming cases to queues in addition to individual users.
- Select the default owner of cases that don't meet the criteria in your assignment rule on the Support Settings page in Setup.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- Create an active case assignment rule to determine how web-generated cases are assigned to users or put into queues. If you do not set an active assignment rule, all web-generated cases are assigned to the default owner you specify on the Support Settings page in Setup.

SEE ALSO:

- [Customize Support Settings](#)
- [Create Custom Fields](#)
- [Email Templates in Salesforce Classic](#)
- [Create Queues](#)
- [Set Up Assignment Rules](#)

Set Up Web-to-Case

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

 **Note:** Before you start, review the Web-to-Case prerequisites and limitations.

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

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

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

After enabling and setting up Web-to-Case, generate the HTML code that your webmaster can put on your website so that customers can submit cases. Keep in mind that up to 5,000 cases can be generated per day with Web-to-Case.

SEE ALSO:

- [Web-to-Case Prerequisites](#)
- [Web-to-Case Notes and Limitations](#)
- [Generate Web-to-Case HTML Code](#)
- [Enable reCAPTCHA to Prevent Spam Cases](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Web-to-Case:

- **Customize Application**

Generate Web-to-Case HTML Code

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

You must have Web-to-Case enabled.

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

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

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

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

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

SEE ALSO:

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

[Enable reCAPTCHA to Prevent Spam Cases](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Web-to-Case:

- Customize Application

To generate Web-to-Case HTML

- Customize Application

Enable reCAPTCHA to Prevent Spam Cases

Enable reCAPTCHA in Web-to-Case to make it easy for customers to contact your company while making it difficult for spambots to waste service representatives' time. Enabling reCAPTCHA is optional.

Web-to-Case must be enabled to use reCAPTCHA for case submission.

The reCAPTCHA widget requires customers to select a checkbox successfully before they can create a case. Enabling spam filtering lets customer service agents focus on actual customer cases, and not on spam cases.

To use Google's reCAPTCHA service, go to the Google reCAPTCHA website and click **Get reCAPTCHA** to register your domain and receive a public and private key pair. Google reCAPTCHA is a resource leveraged by Salesforce to support its users and partners, and is not considered part of our Services for purposes of the salesforce.com Master Subscription Agreement.

 **Note:** If you enable reCAPTCHA later, any existing forms without reCAPTCHA keep working and continue to generate cases. We recommend that you regenerate your HTML and update your website with the new code that includes reCAPTCHA validation.

1. From Setup, enter *Web-to-Case HTML Generator* in the Quick Find box, then select **Web-to-Case HTML Generator**.
2. Select **Enable Spam Filtering (Recommended)**.
3. Enter the key pair that you obtained from Google and registered on the Salesforce Platform. Use the lookup window to select a key that's already registered on the Salesforce Platform.
4. Ensure that the Enable Server Fallback setting is selected.
If the Google reCAPTCHA server fails or goes offline and spam filtering isn't available, this setting allows all case traffic through. This setting is enabled by default and we recommend that you use it. If this setting is disabled and the Google reCAPTCHA server fails or goes offline, then case traffic might be lost.
5. Click **Generate**.
Salesforce creates an HTML code that you can add to your website so that customers can create cases.
6. Add the HTML code to your website.

SEE ALSO:

[Google reCAPTCHA](#)

[Generate Web-to-Case HTML Code](#)

Web-to-Case Notes and Limitations

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

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

- Whenever possible, Web-generated cases are automatically linked to the relevant contact and account based on the customer's email address.
- Salesforce runs field validation rules before creating records submitted via Web-to-Case and only creates records that have valid values. All universally required fields must have a value before a record can be created via Web-to-Case.

EDITIONS

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

USER PERMISSIONS

To configure Web-to-Case

- **Customize Application**

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- The format for date and currency fields captured online is taken from your organization's default settings - `Default Locale` and `Currency Locale`.
- Salesforce doesn't support rich text area (RTA) fields on Web-to-Case forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the case is created.
- If your organization exceeds its daily Web-to-Case limit, the default case owner (specified in your Support Settings page) will receive an email containing the additional case information.

SEE ALSO:

[Provide Web Forms with Web-to-Case](#)

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

[Web-to-Case FAQ](#)

Web-to-Case FAQ

Review frequently asked questions for Web-to-Case.

IN THIS SECTION:

[What is the maximum number of web cases we can capture?](#)

[Who owns new web-generated cases?](#)

[How do I specify which information to capture?](#)

[Can I capture cases from multiple web pages?](#)

[How can our webmaster test the Web-to-Case page?](#)

[What status and origin are assigned to Web-generated cases?](#)

[How can I prevent spam from becoming cases?](#)

[How can I be sure that cases won't be lost?](#)

[How is the "Age" calculated in case reports?](#)

SEE ALSO:

[Email-to-Case FAQ](#)

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

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

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

SEE ALSO:

[Web-to-Case FAQ](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Who owns new web-generated cases?

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

SEE ALSO:

[Web-to-Case FAQ](#)

How do I specify which information to capture?

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

SEE ALSO:

[Web-to-Case FAQ](#)

Can I capture cases from multiple web pages?

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

SEE ALSO:

[Web-to-Case FAQ](#)

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

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

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

SEE ALSO:

[Web-to-Case FAQ](#)

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

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

SEE ALSO:

[Web-to-Case FAQ](#)

How can I prevent spam from becoming cases?

You can limit spam through the following options:

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

SEE ALSO:

[Email-to-Case FAQ](#)

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

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

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

SEE ALSO:

[Web-to-Case FAQ](#)

How is the "Age" calculated in case reports?

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

SEE ALSO:

[Case Fields](#)

[Web-to-Case FAQ](#)

Send and Receive Emails with Email-to-Case

Let customers email you. Use Email-to-Case to automatically turn customer emails into cases, so your agents can quickly track and resolve their issues.

There are two versions of Email-to-Case:

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

Each version supports a different business case.

Details	On-Demand Email-to-Case	Email-to-Case
Business case:	Keep email traffic <i>outside</i> your network's firewall and refuse emails larger than 25 MB	Keep email traffic <i>inside</i> your network's firewall and accept emails larger than 25 MB
Set up:	Requires you to set up Salesforce Apex email services to turn emails into cases	Requires you to download and install the Email-to-Case Agent on your local machine to turn emails into cases

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Details	On-Demand Email-to-Case	Email-to-Case
Maximum number of emails converted to cases each day:	Number of user licenses multiplied by 1,000, up to a daily maximum of 1,000,000	2,500
Email size limit, including header, message, and attachments:	Under 25 MB	Over 25 MB

IN THIS SECTION:

[Set Up Email-to-Case with a Guided Setup Flow](#)

Get your cases into Service Cloud fast with a quick guided setup flow for Email-to-Case. Connect your support email address to Salesforce, give your incoming cases a default priority and queue, and set up mail forwarding so your emails become cases for your support team.

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

Set up Email-to-Case to efficiently resolve customer issues. Salesforce automatically creates cases and auto-populates case fields when customers send messages to the email addresses you specify.

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

Efficiently resolve customer inquiries via email without having to install the Email-to-Case agent software. When customers send messages to email addresses that you specify, Salesforce creates cases and auto-populates case fields.

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

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

[Email-to-Case FAQ](#)

Review frequently asked questions about Email-to-Case.

Set Up Email-to-Case with a Guided Setup Flow

Get your cases into Service Cloud fast with a quick guided setup flow for Email-to-Case. Connect your support email address to Salesforce, give your incoming cases a default priority and queue, and set up mail forwarding so your emails become cases for your support team.

The Email-to-Case setup flow is the fastest and easiest way to turn your incoming emails into cases in Salesforce. When you complete the flow, all emails sent to your support team's email address are turned into cases and placed in a queue. Then, your support team can get to work!

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking



and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Connecting your support email address to Salesforce
- Specifying a queue and priority for the cases that are created from your email
- Verifying your email address with Salesforce
- Setting up email forwarding from your email service provider to Service Cloud

SEE ALSO:

[Get Started with Service Setup](#)

Set Up Email-to-Case

Set up Email-to-Case to efficiently resolve customer issues. Salesforce automatically creates cases and auto-populates case fields when customers send messages to the email addresses you specify.

Email-to-Case requires downloading the Email-to-Case Agent. The Email-to-Case Agent allows you to keep all email traffic within your network's firewall and to accept emails larger than 25 MB from customers.

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

[Create Text Email Templates in Salesforce Classic](#)

[Create Letterhead Email Templates in Salesforce Classic](#)

[Create Visualforce Email Templates in Salesforce Classic](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To enable and set up Email-to-Case:

- [Customize Application](#)

Enable and Configure Email-to-Case

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

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

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

[Email-to-Case Settings](#)

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

Email-to-Case Settings

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

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable and set up Email-to-Case:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

Use Unique Email Subject and Email Body IDs

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



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

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

See Email Attachments in the Case Attachment Related List

By default, in the Attachments related list for cases, email attachments are displayed with an email icon next to the attachment. This icon helps agents identify email attachments quickly. When agents click **View All** on the related list, the list view includes a **Source** column that indicates from where the file originated. This feature is available in Lightning Experience only. To control this feature, use the `Show Email Attachments in Case Attachments Related List` preference on the Support Settings page in Setup.

Using Lightning for Gmail with Email-to-Case in Salesforce Classic

When you relate an email to a case, the email is added as an activity. The email appears in the Emails and the Activity History related lists. If you unrelate the email in Gmail, the email is no longer in the Email related list, but remains in the Activity History related list.

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

[Customize Support Settings](#)

Set Up On-Demand Email-to-Case

Efficiently resolve customer inquiries via email without having to install the Email-to-Case agent software. When customers send messages to email addresses that you specify, Salesforce creates cases and auto-populates case fields.

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

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

Note:

- On-Demand Email-to-Case lets you process customer emails up to 25 MB.
- On-Demand Email-to-Case automatically shortens email text to 32,000 characters. Contact Salesforce if you'd like this limit raised to 128,000 characters for your organization.

SEE ALSO:

- [Send and Receive Emails with Email-to-Case](#)
- [Create Text Email Templates in Salesforce Classic](#)
- [Create Letterhead Email Templates in Salesforce Classic](#)
- [Create Visualforce Email Templates in Salesforce Classic](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

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

- [Customize Application](#)

Enable and Configure On-Demand Email-to-Case

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

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

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

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

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

On-Demand Email-to-Case Settings

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

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

On-Demand Email-to-Case Setting	Description
Over Email Rate Limit Action	<p>Choose what On-Demand Email-to-Case does with email that surpasses your organization's daily email processing limit:</p> <ul style="list-style-type: none"> • Bounce message—The email service returns the message to the sender or to the Automated Case User for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message—The email service deletes the message without notifying the sender. • Requeue message—The email service queues the message for processing in the next 24 hours. If the message is not processed within 24 hours, the email service returns the message to the sender with a

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

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

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

On-Demand Email-to-Case Setting	Description
	notification that explains why the message was rejected.
Unauthorized Sender Action	<p>If you limited the email addresses and domains available for On-Demand Email-to-Case in the <code>Accept Email From</code> field, choose what happens to messages received from senders who are blocked:</p> <ul style="list-style-type: none"> • Bounce message—The email service returns the message to the sender or to the <code>Automated Case User</code> for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message—The email service deletes the message without notifying the sender.

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

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

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

- Customize Application

IN THIS SECTION:

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

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

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

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

Setting	Description
Routing Name	The name for the routing address—for example, Gold Support or Standard Support.
Email Address	<p><i>Email-to-Case source only:</i> The inbound email address for this On-Demand Email-to-Case routing address. Emails sent to this address creates cases using the specified settings. The email address must be unique.</p> <p>Provide a link to this email address on your company's support website.</p>
Save Email Headers	<p><i>Email-to-Case source only:</i> Select this checkbox to save the email routing information associated with each email submitted as a case. Saving email routing information counts towards your organization's overall storage limit.</p> <p>Email headers over 32,000 characters are truncated. To view the full email header, go to Setup and add the Headers field to the Email Message page layout. Then agents can view the full email details, including the header, using the View Email link from the case feed on the case record page. In Salesforce Classic, to view header information for inbound email messages, agents can click the Click here to view original email header on the email detail page. For more information, see Working with Case Emails in Salesforce Classic.</p>
Accept Email From	To limit the email addresses and domains available for On-Demand Email-to-Case, entering them in this field. Leave it blank to

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Setting	Description
	allow On-Demand Email-to-Case to receive email from any email address or domain.
Create Task from Email	<p><i>Email-to-Case source only:</i> Select this checkbox to automatically assign a task to the case owner when an email is submitted as a case.</p> <p>Assignment rules automatically assign owners to a case. However, if a case does not match assignment rule criteria, then the user in the <code>Default Case Owner</code> field on the Support Settings page is assigned to the case.</p>
Task Status	<p><i>Email-to-Case source only:</i> Choose a status from this drop-down list with which to predefine the <code>Status</code> field on tasks automatically assigned to case owners when email is submitted as cases.</p> <p>This setting is only available if you selected the <code>Create Task from Email</code> checkbox.</p>
Case Owner	<p>The owner of the case, which can be either an individual user or a queue. This field is optional.</p> <p> Note:</p> <ul style="list-style-type: none"> • If you specify a case owner, auto-assignment rules are ignored. • You can't delete a queue that a routing address refers to. Either delete the routing address, or edit the routing address settings to point to a different queue.
Case Priority	The priority assigned to cases created from emails sent to this email routing address.
Case Origin	The value assigned to the <code>Case Origin</code> field for email sent to this email routing address.

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

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

Email-to-Case FAQ

Review frequently asked questions about Email-to-Case.

IN THIS SECTION:

[Is there a size limit for attachments using Email-to-Case?](#)

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

SEE ALSO:

[Web-to-Case FAQ](#)

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

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

SEE ALSO:

[Email-to-Case FAQ](#)

Chat on Your Website with Live Agent

Let customers chat with your support agents on your website. Use Live Agent web-based chat to offer real-time chat support to customers. Quickly connect customers to agents by adding chat buttons on your web pages and sending automatic chat invitations to customers as they peruse your website.

Live Agent is a highly customizable feature, and most of its features can be configured declaratively—that is, without coding—in Setup.

Connect your customers with support agents online who provide support quickly, where and when customers need help. Visitors simply click a chat button or accept a chat invitation that sends a chat request to your agents.

Live Agent is helpful for customer support supervisors, too. Supervisors can monitor their agents' chats and assist them in real time with whisper messages. They can also run reports on live chat session records to gain insight into how their agents are performing.

Although you can implement Live Agent almost entirely without writing code, Live Agent features several APIs that enable developers to fully customize the chat experience for your org.

Let's learn more about what Live Agent can do for you. First things first: What is your role?

IN THIS SECTION:

[Set Up Live Agent in Salesforce Classic](#)

Set up Live Agent so that your support agents use the console in Salesforce Classic to chat with customers. You can also add Snap-ins Chat and Einstein Bots to give your agents and customers the best web chat experience.

[Set Up Live Agent in Lightning Experience](#)

Set up Live Agent so that your support agents use a Lightning console app to chat with customers. Then, add Snap-ins Chat and Einstein Bots to give your agents and customers the best web chat experience.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

[Snap-Ins Chat](#)

Add Snap-ins Chat to your website so customers can quickly get answers to their questions by chatting with an agent while browsing your site. Snap-ins Chat uses Live Agent, but with a simpler setup, to power your chats.

[Einstein Bots Chat](#)

Lighten the load on your support agents with automated chat bots that can address straightforward issues or questions from your customers.

Set Up Live Agent in Salesforce Classic

Set up Live Agent so that your support agents use the console in Salesforce Classic to chat with customers. You can also add Snap-ins Chat and Einstein Bots to give your agents and customers the best web chat experience.

IN THIS SECTION:

[Live Agent for Administrators](#)

Welcome to Live Agent for administrators! Live Agent is a comprehensive chat solution that makes it easy for your support organization's agents and support supervisors to assist customers. With Live Agent, your support organization can leverage the comprehensive customer service tools that are available in the Salesforce console while providing real-time chat support.

[Live Agent for Support Supervisors \(Salesforce Classic\)](#)

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. This information applies only to Live Agent in Salesforce Classic.

[Live Agent for Support Agents \(Salesforce Classic\)](#)

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers. This information applies only to Live Agent in Salesforce Classic.

Live Agent for Administrators

Welcome to Live Agent for administrators! Live Agent is a comprehensive chat solution that makes it easy for your support organization's agents and support supervisors to assist customers. With Live Agent, your support organization can leverage the comprehensive customer service tools that are available in the Salesforce console while providing real-time chat support.

As an administrator, you can set up and customize Live Agent for your users, including agents and support supervisors. Live Agent is easy to set up and highly customizable. You can enable a suite of features that your agents and supervisors can use to assist customers.

Watch a Demo: [▶ Live Agent Configuration \(Salesforce Classic\)](#) (English only)

A few major steps are involved in enabling, setting up, and deploying Live Agent in your Salesforce org. Let's get started.

IN THIS SECTION:

[Create a Basic Live Agent Implementation](#)

Before you customize Live Agent, you need to create the basic Live Agent implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Live Agent implementation that your agents can use to chat with customers.

[Customize Your Live Agent Implementation](#)

After you set up your basic Live Agent implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Live Agent offers several options for customizing your implementation declaratively, which means that no coding is required.

[Set Up Live Agent in the Salesforce Console](#)

After you set up and customize your basic Live Agent implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

[Use Omni-Channel with Your Existing Live Agent Implementation](#)

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

SEE ALSO:

[Live Agent for Support Agents \(Salesforce Classic\)](#)

[Live Agent for Support Supervisors \(Salesforce Classic\)](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- [Customize Application](#)

To create user profiles or permission sets:

- [Manage Profiles and Permission Sets](#)

Create a Basic Live Agent Implementation

Before you customize Live Agent, you need to create the basic Live Agent implementation for your Salesforce org. After you complete the basic setup steps, you'll have a functioning Live Agent implementation that your agents can use to chat with customers.

Watch a Demo: [▶ Live Agent Configuration \(Salesforce Classic\)](#) (English only)

IN THIS SECTION:

1. [Enable Live Agent](#)

Get started with Live Agent by enabling it for your Salesforce org. After you enable Live Agent, you can customize it.

2. [Create Live Agent Users](#)

Before your users can assist customers with chat, you need to assign the users as Live Agent users. Live Agent users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

3. [Create and Assign Live Agent Skills](#)

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also empower your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

4. [Create Live Agent Configurations](#)

Live Agent configurations define the Live Agent functionality that's available to your agents and support supervisors when agents chat with customers. Create Live Agent configurations to control the functionality of Live Agent in the Salesforce console.

5. [Create Live Agent Deployments](#)

A deployment is a place on your company's website that's enabled for Live Agent. Create deployments to implement Live Agent and control its functionality on your website.

6. [Create Chat Buttons](#)

Create chat buttons to enable customers to request a chat with an agent directly from your website.

7. [Customize Your Live Agent Branding with Salesforce Sites](#)

To customize your Live Agent implementation with branding images, use a Lightning Platform site to upload the images for your chat window and chat buttons.

SEE ALSO:

[Customize Your Live Agent Implementation](#)

[Add Live Agent to the Salesforce Console in Salesforce Classic](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- [Customize Application](#)

To create user profiles or permission sets:

- [Manage Profiles and Permission Sets](#)

Enable Live Agent

Get started with Live Agent by enabling it for your Salesforce org. After you enable Live Agent, you can customize it.

1. From Setup in Salesforce Classic, enter *Live Agent Settings* in the Quick Find box, then select **Live Agent Settings**.
2. Select **Enable Live Agent**.
3. Click **Save**.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To enable Live Agent:

- Customize Application

Create Live Agent Users

Before your users can assist customers with chat, you need to assign the users as Live Agent users. Live Agent users are support agents and supervisors who have the Salesforce permissions to assist customers with chat.

All Live Agent users need the `API Enabled` administrative permission enabled on their associated profile before they can use Live Agent.

1. From Setup in Salesforce Classic, enter `Users` in the Quick Find box, then select **Users**.
2. Click **Edit** next to a user's name.
3. Select `Live Agent User`. If you don't see this checkbox, verify that your support organization has purchased enough Live Agent feature licenses.
4. Click **Save**.

After creating users, make sure that you assign them a Live Agent configuration and associate them with the appropriate skills.

IN THIS SECTION:

[Permissions for Live Agent Support Agents](#)

Enable a few specific permissions for Live Agent support agents so that they have access to the tools that they need to provide help to customers.

[Permissions for Live Agent Support Supervisors](#)

You must enable certain permissions for Live Agent support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

SEE ALSO:

[Create Live Agent Configurations](#)

[Profiles](#)

[Create and Assign Live Agent Skills](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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 or edit users:

- Manage Internal Users

To enable agents to use Live Agent:

- API Enabled administrative permission

Permissions for Live Agent Support Agents

Enable a few specific permissions for Live Agent support agents so that they have access to the tools that they need to provide help to customers.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables agents to view session records	We don't recommend giving agents the ability to create, edit, and delete session records. Session records are created automatically and are meant to provide a paper trail with information about the time that agents spend online, so we don't recommend giving agents the ability to change these records.
Live Chat Visitors	"Read"	Enables agents to view visitor records	We don't recommend giving agents the ability to create, edit, and delete visitor records. Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend giving agents the ability to change these records.
Live Chat Transcripts	"Read"	Enables agents to view chat transcripts	We don't recommend giving agents the ability to create, edit,

EDITIONS

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Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Record Type	Permission	Description	Considerations
			and delete chat transcripts. Transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers, so we don't recommend giving agents the ability to change these records.
Quick Text	"Read"	Enables agents to view quick text messages and include quick text in chats.	Without the "Read" permission on quick text, agents can't access the quick text sidebar in the Salesforce console.
	"Create"	Enables agents to create quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to create quick text messages. In that case, give the "Create" permission to support supervisors instead.
	"Edit"	Enables agents to edit quick text messages	If you want to standardize quick text messages across your support organization, limit your agents' ability to edit quick text messages. In that case, give the "Edit" permission to support supervisors instead.
	"Delete"	Enables agents to delete quick text messages	If you want to standardize quick text messages across your organization, limit your agents' ability to delete quick text messages. In that case, give the "Delete" permission to support supervisors instead.

SEE ALSO:

[Live Agent Session Records](#)

[Live Agent Transcripts](#)

[Live Agent Visitor Records](#)

[Edit Object Permissions in Profiles](#)

Permissions for Live Agent Support Supervisors

You must enable certain permissions for Live Agent support supervisors so that they have all the tools they need to monitor agents' activities and review customers' information.

General Permissions

Necessary Permission	Description
"API Enabled"	Required for all Live Agent users

Optional Permission	Description
"Assign Live Agent Skills to Users"	Enables supervisors to assign skills to agents.

Object Permissions

Record Type	Permission	Description	Considerations
Live Agent Sessions	"Read"	Enables supervisors to view session records	None
	"Create"	Enables supervisors to create session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.

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Record Type	Permission	Description	Considerations
	"Delete"	Enables supervisors to delete session records	Session records are created automatically and are meant to provide a paper trail that provides information about the time that agents spend online. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Live Chat Transcripts	"Read"	Enables supervisors to view chat transcripts	None
	"Create"	Enables supervisors to create chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to create transcripts manually.
	"Edit"	Enables supervisors to edit chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to edit transcripts.
	"Delete"	Enables supervisors to delete chat transcripts	Chat transcripts are created automatically and are meant to provide a paper trail about your agents' interactions with customers. We don't recommend tampering with these records, but you can give supervisors the ability to delete transcripts.
Live Chat Visitors	"Read"	Enables supervisors to view visitor records	None
	"Create"	Enables supervisors to create visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with

Record Type	Permission	Description	Considerations
			their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to create them manually.
	"Edit"	Enables supervisors to edit visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to edit them.
	"Delete"	Enables supervisors to delete visitor records	Visitor records are created automatically and are meant to provide a paper trail that associates your customers with their chat transcripts. We don't recommend tampering with these records, but you can give supervisors the ability to delete them.
Quick Text	"Read"	Enables supervisors to view Quick Text messages	None
	"Create"	Enables supervisors to create Quick Text messages	None
	"Edit"	Enables supervisors to edit Quick Text messages	None
	"Delete"	Enables supervisors to delete Quick Text messages	None

SEE ALSO:

[Live Agent Session Records](#)

[Live Agent Transcripts](#)

[Live Agent Visitor Records](#)

[Edit Object Permissions in Profiles](#)

Create and Assign Live Agent Skills

Skills identify your agents' areas of expertise. When you assign an agent to a skill, that agent receives chat requests that are related to the agent's skill areas. You can also empower your supervisors to assign skills to agents. This information applies to Live Agent routing for chats only.

1. From Setup, enter *Skills* in the Quick Find box, then select **Skills**.
2. Click **New**.
3. Enter a name for the skill.
For example, you can create a skill that's called "Accounts" for agents who specialize in questions about customer accounts.
4. In the Assign Users area, select the users whom you want to associate with the skill.
5. In the Assign Profiles area, select the profiles that you want to associate with the skill.
6. Click **Save**.

To enable supervisors to assign skills, enable the "Assign Live Agent Skills to Users" permission on their profiles, or assign it to individual users via a permission set. When supervisors have this permission, they can go to **Setup > Customize > Live Agent Skills** and update the assigned profiles or users under each skill.

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USER PERMISSIONS

To create skills:

- Customize Application

To assign skills (supervisors):

- Assign Live Agent Skills to Users

Create Live Agent Configurations

Live Agent configurations define the Live Agent functionality that's available to your agents and support supervisors when agents chat with customers. Create Live Agent configurations to control the functionality of Live Agent in the Salesforce console.

For efficiency, create profiles and users before you create configurations. That way, you can create a configuration and assign it to users and profiles at the same time.

Live Agent configurations enable you to control your users' access to certain Live Agent features. You can create multiple configurations that define Live Agent's functionality for multiple types of users. For example, you might create a configuration specifically for experienced agents that gives them more permissions than new agents have, or you might create a configuration for support supervisors that gives them the permissions that they need to monitor their employees.

1. From Setup in Salesforce Classic, enter *Live Agent Configurations* in the Quick Find box, then select **Live Agent Configurations**.
2. Click **New**.
3. Choose the settings for your Live Agent configuration.
4. Click **Save**.

IN THIS SECTION:

[Live Agent Configuration Settings](#)

Live Agent configuration settings control the functionality that's available to agents and their supervisors while agents chat with customers.

[Supported Browsers for Live Agent Notifications](#)

Live Agent notifications help agents respond to chats efficiently by alerting agents when certain events occur. The types of chat notifications that are supported are determined by the web browsers your agents use.

SEE ALSO:

[Create and Assign Live Agent Skills](#)

[Create Live Agent Users](#)

EDITIONS

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USER PERMISSIONS

To create and edit configurations:

- Customize Application

Live Agent Configuration Settings

Live Agent configuration settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent configuration.

Basic Information

Configure the basic functionality that's available to agents when they chat with customers.

Setting	What It Does
Live Agent Configuration Name	Name of this configuration. This configuration name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for this configuration.
Chat Capacity	Indicates how many chats an agent who is assigned to this configuration can be engaged in at the same time.
Sneak Peek Enabled	Indicates whether agents can see what a chat customer is typing before the customer sends a chat message.
Request Sound Enabled	Indicates whether to play an audio alert when the agent receives a new chat request.
Disconnect Sound Enabled	Indicates whether to play an audio alert when a chat is disconnected.
Notifications Enabled	Indicates whether to display a desktop alert when an agent receives a new chat request.
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.</p> <p>Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.</p> <p> Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual chat button, the message that's associated with your chat button</p>

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Setting	What It Does
	overrides the message that's associated with your configuration.
Auto Away on Decline	Sets the agent's Live Agent status to "Away" automatically when the agent declines a chat request. This option applies only when agents are assigned to chat buttons that use Live Agent push routing.
Auto Away on Push Time-Out	Sets an agent's Live Agent status to "Away" automatically when a chat request that's been pushed to the agent times out. This option applies only when agents are assigned to chat buttons that use Live Agent push routing.
Critical Wait Alert Time	Determines the number of seconds that the agent has to answer a customer's chat before the chat tab alerts the agent to answer it.
Agent File Transfer Enabled	Indicates whether an agent can enable customers to transfer files through a chat.
Visitor Blocking Enabled	Indicates whether an agent can block visitors from an active chat within the Salesforce console. See Let Your Agents Block Visitors by IP Address .
Assistance Flag Enabled	Indicates whether an agent can send a request for help ("raise a flag") to a supervisor.

Chatlets

Chatlets are tools that are available only to organizations that use Live Agent in the Live Agent console. The Live Agent console is no longer supported, so we don't recommend setting up chatlets. But don't worry—if you use Live Agent in the Salesforce console, you don't need chatlets.

Assign Users

Assign eligible users to the configuration to give them access to Live Agent functionality. Later, you'll see that you can also assign profiles to a configuration. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the profile.

 **Warning:** Users can be assigned to only one Live Agent configuration at a time. If you assign the same user to a second Live Agent configuration, the system removes that user from the first Live Agent configuration without warning you. So make sure that you know exactly which Live Agent configuration each user should be assigned to!

For example, let's say that User A is assigned to Live Agent Configuration A. Then, you create Live Agent Configuration B and accidentally assign User A to it. Salesforce automatically removes User A from Live Agent Configuration A and reassigns the user to Live Agent Configuration B without notifying you.

Setting	What It Does
Available Users	Indicates the users who are eligible to be assigned to the configuration.
Selected Users	Indicates the users who are assigned to the configuration.

Assign Profiles

Assign eligible profiles to the configuration to give users who are associated with the profiles access to Live Agent functionality. If a user is assigned a configuration at the profile and user levels, the user-level configuration overrides the configuration that's assigned to the profile.

Setting	What It Does
Available Profiles	Indicates the user profiles that are eligible to be assigned to the configuration.
Selected Profiles	Indicates the user profiles that are assigned to the configuration.

Supervisor Settings (Live Agent Routing Only)

Supervisor settings determine the Live Agent functionality that's available to support supervisors. In addition, these settings determine the default filters that apply to the Agent Status list in the supervisor panel.

Setting	What It Does
Chat Monitoring Enabled	Indicates whether supervisors can monitor their agents' chats in real time while their agents interact with customers.
Whisper Messages Enabled	Indicates whether supervisors can send private messages to agents while agents chat with customers.
Agent Sneak Peek Enabled	Indicates whether supervisors can preview an agent's chat messages before the agent sends them to the customer.
Default Agent Status Filter	Determines the default agent status, such as Online, Offline, or Away, by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who have that status.
Default Skill Filter	Determines the default skill by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that skill.
Default Button Filter	Determines the default button by which to filter agents in the supervisor panel. When supervisors view the Agent Status list in the supervisor panel, they see a list of agents who are assigned to that button.

Setting	What It Does
Assigned Skills	<p>Determines the skills that are visible to supervisors in the supervisor panel.</p> <p>When supervisors view the Agent status list in the supervisor panel, they see a list of agents who are assigned to these skills. If you don't select any skills, the Agent Status list displays agents who are assigned to any skill.</p>

Chat Conference Settings (Live Agent Routing Only)

Determine whether agents can invite other agents to join them in a customer chat. Chat conferencing lets your agents include multiple agents in a single chat. That way, your agents can help your customers get the solutions that they need without making your customers wait for their chats to be transferred. Chat conferencing isn't available for chats routed with Omni-Channel.

 **Note:** Chat conferencing does not support the Related Entities panel. If you attempt to use it with chat conferencing, important details might not be saved on your record.

Setting	What It Does
Chat Conferencing Enabled	Indicates whether agents can invite other agents to join them in customer chats.

Chat Transfer Settings

Determine how agents can transfer chats to other agents.

Setting	What It Does
Chat Transfer to Agents Enabled	Indicates whether agents can transfer chats to another agent directly.
Chat Transfer to Skills Enabled	Indicates whether agents can transfer chats to agents assigned to a particular skill.
Chat Transfer to Skills	<p>Determines the skill groups to which agents can transfer chats.</p> <p>Agents can transfer chats to available agents who are assigned to those skills.</p>
Chat Transfer to Live Chat Buttons Enabled	Indicates whether agents can transfer chats to a button or queue.
Chat Transfer to Live Chat Buttons	<p>Determines the buttons to which agents can transfer chats.</p> <p>Agents can transfer chats to available agents who are assigned to those buttons.</p>

SEE ALSO:

[The Live Agent Supervisor Panel for Salesforce Classic Agent Status List](#)

Supported Browsers for Live Agent Notifications

Live Agent notifications help agents respond to chats efficiently by alerting agents when certain events occur. The types of chat notifications that are supported are determined by the web browsers your agents use.

Two types of chat notifications are available in Live Agent.

Chat request notifications

Notifies an agent when the agent receives a chat request; available as audio notifications and desktop notifications

Disconnect notifications

Notifies an agent when the agent is disconnected from Live Agent; available as audio notifications only

Browser	Version	Audio Notifications Supported?	Desktop Notifications Supported?
Google Chrome™	Most recent stable version	Yes	Yes
Mozilla® Firefox®	Most recent stable version	Yes	Yes
Apple® Safari®	6.x on Mac OS X	Yes	Yes
Windows® Internet Explorer®	9	No	No

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Create Live Agent Deployments

A deployment is a place on your company's website that's enabled for Live Agent. Create deployments to implement Live Agent and control its functionality on your website.

To customize the chat window that your customers see, you first need to create a Salesforce site to host your custom images.

A deployment consists of a few lines of JavaScript that you add to a Web page. Your organization can have a single Live Agent deployment or multiple deployments. For example, if you have a single service center that supports multiple websites, creating a separate deployment for each site enables you to present multiple chat windows to your visitors.

1. From Setup in Salesforce Classic, enter *Deployments* in the Quick Find box, then select **Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
Salesforce generates the deployment code.
5. Copy the deployment code, and then paste it on each Web page where you want to deploy Live Agent. For best performance, paste the code immediately before the closing body tag (that is, `</body>`).

 **Note:** If you're using security zones in Internet Explorer 9, verify that your deployment and any website that hosts that deployment are in the same security zone. Due to an issue with Internet Explorer, it's not possible to launch a chat window from a website that's in a different security zone. For more information on security zones, refer to Internet Explorer help.

 **Note:** If you move instances for an instance refresh or org migration, regenerate the code using these steps after the maintenance is complete.

IN THIS SECTION:

[Live Agent Deployment Settings](#)

Live Agent deployment settings control the functionality that's available to agents and their supervisors while agents chat with customers.

[Permitted Domains and Live Agent Deployments](#)

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Live Agent deployments. There are a few considerations to keep in mind when you use permitted domains.

SEE ALSO:

[Customize Your Live Agent Branding with Salesforce Sites](#)

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USER PERMISSIONS

To create deployments:

- Customize Application

Live Agent Deployment Settings

Live Agent deployment settings control the functionality that's available to agents and their supervisors while agents chat with customers.

Apply settings when you create or edit a Live Agent deployment.

Basic Information

Configure the basic functionality that's available on a particular Live Agent deployment.

Setting	What It Does
Live Chat Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the <code>Developer Name</code> .
Developer Name	Sets the API name for this deployment.
Chat Window Title	Sets the name of the chat window as it appears to customers.
Allow Visitors to Save Transcripts	Indicates whether customers can save copies of their chat transcripts after they finish chatting with an agent.
Allow Access to Pre-Chat API	Indicates whether developers can access and implement the pre-chat API.  Warning: The pre-chat API gives developers access to potentially personal information that customers provide in pre-chat forms, such as the customer's name and email address.
Permitted Domains	Determines the domains that can host the deployment. When using permitted domains: <ul style="list-style-type: none"> List as many domains as you need to, but only one per line. Use only the domain and subdomain. For example, use <code>xyz.domain.com</code>, <code>domain.com</code>, or <code>www.domain.com</code>. Don't include <code>http://</code> or mappings to specific pages within a domain, such as <code>domain.com/page</code>. Make sure that you specify all the domains that you want to allow to host the deployment. To make the deployment usable on any domain, leave the Permitted Domains field empty.

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Setting	What It Does
Enable Custom Timeouts	Indicates whether a warning and timeout for the agent are enabled for when the customer is idle in a chat.
Idle Connection Warning Duration	Indicates the duration, in seconds, that the customer can remain idle or disconnected before a warning is sent to the agent. The default value is 40 seconds. Appears when <code>Enable Custom Timeouts</code> is selected.
Idle Connection Timeout Duration	Indicates the duration, in seconds, that the customer can remain idle or disconnected before the chat ends. The default value is 110 seconds. Appears when <code>Enable Custom Timeouts</code> is selected.

Chat Window Branding

You can optionally customize your chat windows with custom images by associating your deployment with a Lightning Platform site and its static resources.

Setting	What It Does
Branding Image Site	Determines the Lightning Platform site that's associated with the deployment. By associating your deployment with a Lightning Platform site, you can customize your deployment with branding images. Store your branding images as static resources with your Salesforce site.
Chat Window Branding Image	Sets the custom graphic that appears in the customer's chat window.
Mobile Chat Window Branding Image	Sets the custom graphic that appears in the customer's chat window when the customer accesses chat from a mobile site.

SEE ALSO:

- [Customize Your Live Agent Branding with Salesforce Sites](#)
- [Permitted Domains and Live Agent Deployments](#)

Permitted Domains and Live Agent Deployments

To enhance security and minimize the number of illegitimate chat requests that you receive, use the permitted domains option when you create Live Agent deployments. There are a few considerations to keep in mind when you use permitted domains.

- List as many domains as you need to, but only one per line.
- Use only the domain and subdomain—for example, `xyz.domain.com`, `domain.com`, or `www.domain.com`. Don't include `http://` or mappings to specific pages within a domain, such as `domain.com/page`.
- Specify all the domains that you want to allow to host the deployment.

- To make the deployment usable on any domain, leave the Permitted Domains field empty.

SEE ALSO:

[Create Live Agent Deployments](#)

Create Chat Buttons

Create chat buttons to enable customers to request a chat with an agent directly from your website.

Before you create chat buttons, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.
- Create a Salesforce site and static resources to use custom images for the online and offline versions of your button. If you don't have a Salesforce site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

You need to create the buttons that visitors click to start chats. Like a deployment, a button consists of several lines of JavaScript that you copy and paste into Web pages. A single deployment can have multiple buttons; each button enables you to refine the chat experience for visitors. For example, your service deployment might have buttons for personal computer, laptop, or tablet issues. Each button is mapped to a skill or set of skills to ensure that visitors' inquiries go to only those agents who can solve the visitors' problems.

1. From Setup in Salesforce Classic, enter *Chat Buttons* in the Quick Find box, then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Select Chat Button from the **Type** field.
4. Choose the remaining settings for your chat button.
5. Click **Save**.
6. Copy the button code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the button to appear.



Tip: Because the code changes with each modification, remember to copy and paste the code each time that you update the button.

IN THIS SECTION:

[Chat Button Settings](#)

Chat button settings control the behavior of the chat buttons that customers use to interact with agents.

[Chat Routing Options](#)

Routing options in Live Agent enable you to specify how incoming chat requests are directed to agents.

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USER PERMISSIONS

To create and customize chat buttons:

- Customize Application

[Chat Queuing Options](#)

Queuing options in Live Agent let you control how incoming chat requests are handled when no agents are available.

SEE ALSO:

[Create and Assign Live Agent Skills](#)

[Customize Your Live Agent Branding with Salesforce Sites](#)

Chat Button Settings

Chat button settings control the behavior of the chat buttons that customers use to interact with agents.

Apply settings when you create or edit a Live Agent chat button.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	<p>Determines the type of button that you want to create.</p> <p> Warning: When you create a chat button to host on your website, you must set this option to Chat Button.</p>
Name	<p>Names the chat button.</p> <p>This button name, or a version of it, automatically becomes the Developer Name.</p>
Developer Name	Sets the API name for the chat button.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message and starts again from 0 on the next agent's message.
Customer Time-Out Warning (seconds)	<p>Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown.</p> <p>The warning disappears (and the timer stops) each time the customer sends a message.</p> <p>The warning disappears (and the timer resets to 0) each time the agent sends message.</p> <p>The warning value must be shorter than the time-out value (we recommend at least 30 seconds).</p>

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Setting	What It Does
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request.</p> <p>Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.</p> <p> Note: If you specify an automatic greeting message in both your Live Agent configuration and in an individual chat button, the message that's associated with your chat button overrides the message that's associated with your configuration.</p>

Routing Information

Configure how the button or invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Sets how chats are routed to an agent.
Skills	Associates skills with the button. Incoming chat requests that originate from the button are routed to agents with the skills that you specify.
Push Time-Out (seconds)	Sets the amount of time an agent has to answer a chat request before the request is rerouted to another agent.
Enable Queue	Indicates that queueing is enabled. Queueing allows incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this setting controls the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this number is the maximum number of chats allowed to queue.
Reroute Declined Requests	Lets a chat request that all available agents have declined be rerouted and sent to all available agents again. Available only for requests with Least Active and Most Available routing types.
Automatically Accept Chats	Lets the first available agent automatically accept chat requests originating from this button.

Chat Button Customization

You can optionally customize your chat button with custom images by associating your deployment with a Salesforce site and its static resources.

Setting	What It Does
Site for Resources	Determines the Salesforce site that's associated with the chat button. By associating your button with a Salesforce site, you can customize the button with branding images. Store your branding images as static resources with your Salesforce site.
Online Image	Sets the custom button graphic that appears when the chat button is unavailable.
Offline Image	Sets the custom button graphic that appears when the chat button is available for customers to request new chats.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Lightning Platform page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the web page that hosts your pre-chat form. Specify an absolute URL.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the web page that hosts your post-chat page. Specify an absolute URL.

SEE ALSO:

[Customize Your Live Agent Branding with Salesforce Sites](#)

[Chat Routing Options](#)

[Chat Queuing Options](#)

[Pre-Chat Forms and Post-Chat Pages](#)

Chat Routing Options

Routing options in Live Agent enable you to specify how incoming chat requests are directed to agents.

Routing Option	Description
Choice	Incoming chat requests are added to the queue in Live Agent in the Salesforce console and are available to any agent with the required skill.
Least Active	Incoming chats are routed to the agent with the required skill who has the fewest active chats. This option is a push option, which means that incoming chats are routed, or “pushed,” to agents. You can specify the amount of time that an agent has to answer a chat request before it’s routed to the next available, qualified agent.
Most Available	Incoming chats are routed to the agent with the required skill and the greatest difference between chat capacity and active chat sessions. For example: Agent A has a capacity of eight and Agent B has a capacity of two. If Agent A has two active chat sessions while Agent B has one, incoming chats are routed to Agent A. This option is a push option, which means that incoming chats are routed, or “pushed,” to agents. You can specify the amount of time that an agent has to answer a chat request before it’s routed to the next available, qualified agent.
Omni	Incoming chats are routed to agents using Omni-Channel queues. You must route chats with Omni-Channel if you want to use Live Agent in Lightning Experience.

EDITIONS

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Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Chat Queuing Options

Queuing options in Live Agent let you control how incoming chat requests are handled when no agents are available.

For each Live Agent chat button or invitation that you create, you can enable queuing to put incoming chat requests on hold if no agents with the required skills are available to accept the requests. You can also specify the maximum number of requests in a queue. By enabling queues and setting limits for them, you can control how incoming chat requests are handled, which helps agents manage chat backlogs.

With queuing enabled, your company can accept incoming chat requests even when agents are at capacity, and you can specify the maximum number of requests to accept. This helps agents work effectively and limits the amount of time that customers spend waiting to chat.

The way that chat queuing works is determined by chat routing options. Routing options are set through your chat button or automated invitation. See [Chat Routing Options](#) to learn more about how you can route chats to the right agents.

Let's look at how queuing and routing options work together:

Queuing Option	With This Routing Option	Results
Queuing is not enabled	Choice	<ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. • Incoming chat requests are added to the Live Agent widget. • When agents have capacity for new chat sessions, they can select incoming requests from the list.
Queuing is not enabled	Least Active or Most Available	<ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or all online agents have reached capacity. • When agents have the capacity for new chat

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Queuing Option	With This Routing Option	Results
Queuing is enabled without a per-agent or overall limit	Choice	<p>sessions, requests are routed to them.</p> <ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • Incoming chat requests are added to the Chat Requests list. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled without a per-agent or overall limit	Least Active or Most Available	<ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available. • When agents have the capacity for new chat sessions, requests are routed to them.
Queuing is enabled with a per-agent or overall limit defined	Choice	<ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there are no agents with the required skill who are available or until the queue limit is reached. Users then see the offline version of the button until older chat sessions have ended. • Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended. • When agents have capacity for new chat sessions, they can accept incoming requests from the list.
Queuing is enabled with a per-agent or overall limit defined	Least Active or Most Available	<ul style="list-style-type: none"> • Users see the online version of your chat button and can submit new requests unless there aren't any available agents with the required skill, or until the queue limit is reached. In those cases, users see the offline version of the button until older chat sessions have ended and an agent is available.

Queuing Option**With This Routing Option****Results**

- Incoming chat requests are added to the queue until the per-agent or overall limit is reached, at which point no new requests are accepted until older chat sessions have ended.
- When agents have the capacity for new chat sessions, requests are routed to them.

SEE ALSO:

[Chat Routing Options](#)

Customize Your Live Agent Branding with Salesforce Sites

To customize your Live Agent implementation with branding images, use a Lightning Platform site to upload the images for your chat window and chat buttons.

To customize your chat window and chat buttons, you need to create one or more Lightning Platform sites and then upload the images that you want to use as static resources. Static resources enable you to upload content that you can reference in a Visualforce page. Each static resource has its own URL that Salesforce uses to access the images when the chat window loads.

1. Create a Lightning Platform site to host your images.

When you create a Lightning Platform site for your Live Agent deployment, you need to provide only the following information.

- A site label and site name
- A site contact
- The active site's home page
- A site template

2. Upload your branding images as static resources.

 **Note:** The maximum size for a standard chat window images is 50 pixels.

SEE ALSO:

[Create and Edit Salesforce Sites](#)

[Defining Static Resources](#)

[Create Chat Buttons](#)

[Create Automated Chat Invitations](#)

[Create Live Agent Deployments](#)

EDITIONS

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USER PERMISSIONS

To create and edit Salesforce Sites:

- Customize Application

Customize Your Live Agent Implementation

After you set up your basic Live Agent implementation, customize it with solutions that are appropriate for your agents, supervisors, and customers. Live Agent offers several options for customizing your implementation declaratively, which means that no coding is required.

IN THIS SECTION:

[Create Automated Chat Invitations](#)

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

[Pre-Chat Forms and Post-Chat Pages](#)

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

[Create Quick Text Messages](#)

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

[Set Visibility for Live Agent Users](#)

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using profiles and permission sets.

[Set Privacy Options for Live Agent Users](#)

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

SEE ALSO:

[Create a Basic Live Agent Implementation](#)

[Add Live Agent to the Salesforce Console in Salesforce Classic](#)

EDITIONS

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USER PERMISSIONS

To set up Live Agent:

- Customize Application

To create user profiles or permission sets:

- Manage Profiles and Permission Sets

Create Automated Chat Invitations

Set up automated chat invitations that appear as animated pop-ups on your website to invite customers to chat with an agent.

Before you create automated invitations, you need to:

- Create skills. Each chat button is associated with a particular skill or set of skills so that chats that are initiated from the button are routed to the appropriate agents.
- Create a Salesforce site and static resources to use custom images for the online and offline versions of your button. If you don't have a Salesforce site, you can specify online and offline button images or text by modifying the code that's generated when you create a button.

Automated invitations can be set to trigger based on certain criteria, such as whether a customer remains on a Web page for more than a specified amount of time. Invitations can be associated with specific skills, which ensures that customers will be routed to the appropriate agent when they accept an invitation to chat.

1. From Setup in Salesforce Classic, enter *Chat Buttons & Invitations* in the Quick Find box, then select **Chat Buttons & Invitations**.
2. Click **New**.
3. Under **Type**, select Automated Invitation.
4. Click **Save**.
5. Copy the invitation code, and then paste it on each Web page where you've deployed Live Agent. Make sure that you paste the code in the area on the page where you want the invitation to appear.

 **Tip:** Because the code changes with each modification, remember to copy and paste the code each time that you update the invitation.

IN THIS SECTION:

[Automated Invitation Settings](#)

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

SEE ALSO:

[Create and Assign Live Agent Skills](#)

[Customize Your Live Agent Branding with Salesforce Sites](#)

[Create Live Agent Deployments](#)

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USER PERMISSIONS

To create and customize automated chat invitations:

- Customize Application

Automated Invitation Settings

Automated invitation settings control the behavior of the invitations that are sent to your customers to prompt them to chat with agents while they visit your website.

Apply settings when you create or edit a Live Agent automated invitation.

Basic Information

Configure the basic functionality that's available on a particular Live Agent chat button.

Setting	What It Does
Type	<p>Determines whether to create a chat button or automated invitation.</p> <p> Warning: When creating an automated chat invitation, you must set this option to Automated Invitation.</p>
Active	Determines whether the automated invitation is "active" or can automatically be sent to customers.
Name	<p>Names the invitation.</p> <p>This invitation name, or a version of it, automatically becomes the <code>Developer Name</code>.</p>
Developer Name	Sets the API name for the invitation.
Deployments	Allows you to choose the deployments where this invitation appears.
Language	Sets the default language for text in the chat window.
Enable Customer Time-Out	Indicates whether chats are ended if the customer doesn't respond within a specified period.
Customer Time-Out (seconds)	Sets the amount of time that a customer has to respond to an agent message before the session ends. The timer stops when the customer sends a message. The timer resets to 0 each time the agent sends a message.
Customer Time-Out Warning (seconds)	Sets the amount of time that a customer has to respond to an agent message before a warning appears and a timer begins a countdown. The warning disappears (and the timer stops) each time the customer sends a message. The warning disappears (and the timer resets to 0) each time the agent sends message. The warning value must be shorter than the

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Setting	What It Does
	time-out value (we recommend at least 30 seconds).
Custom Agent Name	Sets the agent's name as it appears to customers in the chat window.
Auto Greeting	<p>Sets a customized greeting message that the customer receives automatically when an agent accepts the customer's chat request from an invitation.</p> <p>Optionally, use merge fields to customize the information in your greeting by using the Available Merge Fields tool. For example, you can personalize the chat experience by using merge fields to include the customer's name in the greeting.</p> <p> Note: If you specify an automatic greeting message in your Live Agent configuration and in an invitation, the message that's associated with your invitation will override the message that's associated with your configuration.</p>

Routing Information

Specify how this invitation routes chats to the best-fit agent.

Setting	What It Does
Routing Type	Determines how incoming chat requests that originate from the invitation are routed to agents with the appropriate skills.
Skills	Associates skills with the invitation. Incoming chat requests that originate from the invitation are routed to agents with ALL the skills that you specify.
Queue	Selects the queue for this invitation.
Enable Queue	Indicates that queuing is enabled, allowing incoming chat requests to wait in a queue until an agent with the appropriate skills is available to accept the chat.
Queue Size Per Agent	Determines the queue's capacity to hold chat requests per available agent. For Live Agent routing or when chats have a size of 1, this is the number of chats allowed to queue for each agent.
Overall Queue Size	Determines the queue's capacity to hold chat requests. For Live Agent routing or when chats have a size of 1, this is the maximum number of chats allowed to queue.

Invitation Animation

Customize your invitation's animations to determine how the animation will appear to customers.

Setting	What It Does
Display Time	Determines how long the invitation will be displayed to customers before it disappears.
Allow invitation to be triggered again after accepting	Indicates whether the invitation can be sent to the customer again after the customer has accepted a previous invitation.
Allow invitation to be triggered again after rejecting	Indicates whether the invitation can be sent to the customer again after the customer has rejected a previous invitation.
Animation	<p>Determines the type of animation for your invitation. Depending on which animation you choose, you'll be prompted to select the positions where the invitation will appear on-screen to customers.</p> <p> Note: Animations won't render for agents using Internet Explorer versions 9 and below.</p>

Invitation Customization

You can optionally customize your invitation with custom images by associating your deployment with a Salesforce site and its static resources.

Setting	What It Does
Site for Resources	Determines the Salesforce site that's associated with the invitation. By associating your invitation with a Salesforce site, you can customize the invitation with branding images. Store your branding images as static resources with your Salesforce site.
Invitation Image	Sets the custom button graphic that appears for this invitation.
Custom Chat Page	Replaces the standard Live Agent chat window with a custom chat window page that you've developed. Use this option only to use a chat window other than the default chat window that Live Agent provides.
Pre-Chat Form Page	Directs Live Agent to the Lightning Platform page that hosts your customized pre-chat form that customers see before they begin a chat with an agent.
Pre-Chat Form URL	Directs Live Agent to the URL of the Web page that hosts your pre-chat form.
Post-Chat Page	Directs Live Agent to your customized post-chat page that customers see after they complete a chat.
Post-Chat Page URL	Directs Live Agent to the URL of the Web page that hosts your post-chat page.

Sending Rule

Create sending rules for your invitation to determine when to trigger and send the invitation to customers. You can include multiple criteria in your sending rule. Additionally, if your sending rule requires more complicated logic, you can apply Boolean operators to your sending rule.

Setting	What It Does
Criteria	Sets the criteria to be evaluated by the sending rule. For example, you can create a rule that sends the invitation based on how many seconds a customer has been viewing a Web page.
Operator	Sets the operator to evaluate your criteria. For example, you can create a rule that sends the invitation when a customer has been on a page for more than a specified number of seconds.
Value	Sets the value to evaluate the formula against. For example, you can create a rule that sends the invitation when a customer has been on a page for more than 30 seconds.

SEE ALSO:

[Chat Routing Options](#)

[Create and Assign Live Agent Skills](#)

[Chat Queuing Options](#)

[Customize Your Live Agent Branding with Salesforce Sites](#)

[Pre-Chat Forms and Post-Chat Pages](#)

Pre-Chat Forms and Post-Chat Pages

Pre-chat forms and post-chat pages in Live Agent enable you to exchange information with customers who contact your company through chat.

Pre-chat forms and post-chat pages offer a standardized way of collecting information from customers who contact your company through chat. These forms and pages also offer a standardized way of sharing information with customers after their chat sessions are finished. In addition, by using these forms and pages, you can customize the chat experience for your users.

By using pre-chat forms, you can collect information from a customer, such as a name or a description of a problem, after the customer requests to chat with an agent. This information can help direct chat requests efficiently and can reduce the amount of time that agents need to spend collecting information before beginning a chat session. You can also use this information to customize a customer's experience while the customer chats with an agent, such as including the customer's first name in the chat window.

By using post-chat pages, you can share information with customers at the end of a chat session. For example, you can direct your customers to another Web page after they complete a chat with an agent, and you can forward them to a survey about their chat experience.

You have to create pre-chat forms and post-chat pages programmatically, using Live Agent's APIs. For information on creating customized pre-chat forms and post-chat pages, see the [Live Agent Developer Guide](#) (English only).

EDITIONS

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Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Create Quick Text Messages

With quick text, users can insert standardized notes, greetings, and answers to common questions without retyping the message each time. Create custom messages for your users to insert when they communicate with customers.

In Setup, add quick text to your app to let your users view the quick text list view.

1. Open Quick Text in your app.

- In Salesforce Classic, click the **Quick Text** tab.
- In Lightning Experience, select **Quick Text** from the item picker.

2. Click **New**.

If you have more than one quick text record type, select a record type for the new message, and then click **Continue**.

3. Enter a message name.

Use a name that helps users identify when to use this message.

4. Enter the message.

The message can include line breaks, lists, special characters, merge fields, and up to 4,000 characters.

5. Select the channels in which you want the message to be available.

Depending on which features are enabled in your org, these channels might be available.

- Email—the Email action
- Live Agent—Live Agent in the Service Console
- Phone—the Log a Call action
- Portal—a community or a customer portal
- Internal—works with internal fields, like the Change Status action



Note: If you don't specify a channel, the quick text message can't be used because it won't be available in any actions.

The Portal and Internal channels aren't supported in Lightning Experience. These channels display in the picklist but they aren't mapped to any actions in Lightning Experience.

6. Select a category.

In orgs created before Spring '18 that enabled quick text in Salesforce Classic, this field is required and a default Category is provided for you. In orgs created after Spring '18, this field isn't required.

7. Click **Save**.



Tip: If you added merge fields, you can preview the quick text data from records that you choose.

SEE ALSO:

[Insert and Use Quick Text](#)

[Generate Emails From Records](#)

EDITIONS

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

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

USER PERMISSIONS

To create quick text messages:

- Create, Read, Edit, and Delete on Quick Text

Set Visibility for Live Agent Users

Choose how your Live Agent users can view the Supervisor Tab and Live Agent Sessions using profiles and permission sets.

IN THIS SECTION:

[Set Visibility for the Supervisor Tab through Profiles](#)

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

[Set Visibility for the Live Agent Sessions Tab through Permission Sets](#)

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

[Set Visibility for the Live Agent Sessions Tab through Profiles](#)

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Set Visibility for the Supervisor Tab through Profiles

The Live Agent supervisor panel is your supervisors' one-stop shop for finding information about their organizations' chat buttons and chat agents. Make the Live Agent supervisor tab visible to users who are assigned to specified profiles.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click **Edit** next to the profile that you want to give access to the supervisor tab.
3. Set the visibility of the Live Agent supervisor tab to `Default On`.
4. Click **Save**.

After you give your users permission to access the Live Agent supervisor tab, set up access to the Live Agent supervisor panel in the Salesforce console.

SEE ALSO:

[The Live Agent Supervisor Panel for Salesforce Classic](#)

EDITIONS

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USER PERMISSIONS

To set tab visibility for Live Agent features:

- Manage Profiles and Permission Sets

Set Visibility for the Live Agent Sessions Tab through Permission Sets

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified permission sets.

Alternatively, you can give users access to the Live Agent sessions tab through profiles.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Click the name of a permission set, or create a permission set.
3. Click **Object Settings**.
4. Click **Live Agent Sessions**.
5. Click **Edit**.
6. In Tab Settings, select *Available* and *Visible*.
7. Click **Save**.

SEE ALSO:

- [Set Visibility for the Live Agent Sessions Tab through Profiles](#)
- [Live Agent Session Records](#)

EDITIONS

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USER PERMISSIONS

To set tab visibility for Live
Agent features:

- [Manage Profiles and Permission Sets](#)

Set Visibility for the Live Agent Sessions Tab through Profiles

Session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers. Make the Live Agent sessions tab visible to users who are assigned to specified profiles.

Alternatively, you can give users access to the Live Agent sessions tab through permission sets.

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Select a support agent profile.
3. Click **Edit**.
4. Set the visibility of the Live Agent sessions tab to `Default On`.
5. Click **Save**.

SEE ALSO:

[Set Visibility for the Live Agent Sessions Tab through Permission Sets](#)
[Live Agent Session Records](#)

Set Privacy Options for Live Agent Users

Protect your agents and the customers they assist by blocking sensitive data and unwanted visitors.

IN THIS SECTION:

[Block Sensitive Data in Chats](#)

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

[Let Your Agents Block Visitors by IP Address](#)

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

[Create an IP Blocking Rule to Block Chat Visitors](#)

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

EDITIONS

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USER PERMISSIONS

To set tab visibility for Live Agent sessions:

- Manage Profiles and Permission Sets

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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Block Sensitive Data in Chats

Sensitive data rules let you block specific patterns, such as credit card, Social Security, phone and account numbers, or even profanity. You can choose to remove the text or replace it with your preferred characters.

1. In Setup, enter *Sensitive Data* in the Quick Find box, then select **Sensitive Data Rules**.
2. Click **New**.
3. Write each pattern as a JavaScript regular expression (regex), and choose your preferred settings. The regex is case-sensitive.
4. Click **Test Your Pattern**.
5. Enter some text in the format of the data you want to block, such as 123-45-6789 for a Social Security number.
6. Preview your results to ensure that the rule is working correctly.
7. Select the roles for which you want to enforce this rule.
8. Click **Save**.

You can block the text from agents, supervisors, customers, or all of these. When a rule is triggered, it logs one or more of these chat transcript events:

- Sensitive data blocked (Agent)
- Sensitive data blocked (Supervisor)
- Sensitive data blocked (Visitor)

 **Note:** Sensitive data is visible while someone's typing, but it is masked when the person sends it. So if you want to mask customer information from agents, we recommend disabling Agent Sneak Peek (under **Setup > Customize > Live Agent > Live Agent Configurations**).

Sensitive data rules apply to the auto-greeting and any quick text that you have enabled. They don't apply to the agent name or other standard text in the chat window.

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USER PERMISSIONS

To create sensitive data rules:

- Customize Application

Let Your Agents Block Visitors by IP Address

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can enable your agents to block chat requests from specified IP addresses while they work in the console. For example, if a customer is using abusive language or sending spam messages, the agent can block that user from starting a new chat.

An agent action can block chats from an individual IP address.

Blocked visitors see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat is canceled. In addition, you can modify or delete blocking rules.

1. From Setup in Salesforce Classic, enter *Live Agent Configurations* in the Quick Find box, then select **Live Agent Configurations**.
2. Click **Edit** next to the configuration that you want to modify.
3. Under **Basic Information**, select **Visitor Blocking Enabled**.
4. Click **Save**.

As a Salesforce admin, you can also block individual IP addresses. Or, if your Salesforce org is receiving spam chats from a particular region, you can block entire IP ranges. See [Create an IP Blocking Rule](#) for more information.

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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

Create an IP Blocking Rule to Block Chat Visitors

Help your agents avoid troublesome customers by blocking chats from specified IP addresses.

You can block chat requests from specified IP addresses. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat. If your Salesforce org is receiving spam chats from a particular region, you can block entire ranges of IP addresses.

Blocked visitors see a message indicating that chat isn't available.

If a customer attempts to request a chat from a blocked IP address, the chat is canceled. In addition, you can modify or delete blocking rules.

1. From Setup in Salesforce Classic, enter *Block Visitors* in the Quick Find box, then select **Block Visitors**. For guidelines on entering valid IP ranges, see [Set Trusted IP Ranges for Your Organization](#).
2. Click **New** and fill in the parameters of your Blocking Rule.
3. Click **Save**.

You can also enable your agents to block chat requests from specified IP addresses while they work in the console. See [Let Your Agents Block Visitors by IP Address](#) for more information.

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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

Set Up Live Agent in the Salesforce Console

After you set up and customize your basic Live Agent implementation, add it to the Salesforce console so that your agents and supervisors can start using chat to assist customers. Additionally, you can set up some other features in the Salesforce console to create an even more robust chat experience for your agents and your customers.

IN THIS SECTION:

[Add Live Agent to the Salesforce Console in Salesforce Classic](#)

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

[Set Up Chat Answers from Knowledge Articles](#)

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console.

[Add the Supervisor Panel to the Salesforce Console](#)

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

[Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console](#)

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

SEE ALSO:

[Create a Basic Live Agent Implementation](#)

[Customize Your Live Agent Implementation](#)

[Set Up a Salesforce Console App in Salesforce Classic](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent:

- Customize Application

To create user profiles or permission sets:

- Manage Profiles and Permission Sets

Add Live Agent to the Salesforce Console in Salesforce Classic

Adding Live Agent to the Salesforce console enables agents and supervisors to chat with customers and access other customer service tools in one place.

Before you add Live Agent to a Salesforce console app, you need to create a Salesforce console app if you don't have one set up.

After you set up Live Agent, add it to a Salesforce console app. After Live Agent is set up in the console, your agents can interact with chat customers. With the Salesforce console, your agents and supervisors can access Live Agent and other Service Cloud products in one place to provide customers fast and efficient customer service.

1. From Setup, enter `Apps` in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the name of the Salesforce console app in which you want to set up Live Agent.
3. Select `Include Live Agent in this App`.
4. Choose the records or pages that you want to open as subtabs of chat sessions in the chat workspace.
5. Optionally, if your Salesforce org has Knowledge enabled, select `Include Suggested Articles from Knowledge in Live Agent` to display the Knowledge One widget in the chat workspace.
6. Click **Save**.

You can run multiple Salesforce apps at the same time. However, if you log in to another Salesforce app while you're logged in to a Salesforce console app, you can't accept new chat requests.

SEE ALSO:

[Set Up a Salesforce Console App in Salesforce Classic](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To add Live Agent to the Salesforce console:

- Customize Application

Set Up Chat Answers from Knowledge Articles

If your organization uses Salesforce Knowledge, you can enable your agents to answer customer questions by using information from your knowledge base. Set up chat answers on articles so that agents can search for articles from Live Agent in the Salesforce console.

To let agents use the Knowledge One widget to include information from Knowledge articles in chats, add a custom field called “Chat Answer” to article types. This field stores information from the article that’s appropriate to share with customers during a live chat. Using this field can be helpful for articles that are too long for an agent to include easily in a response.

 **Note:** Attaching articles to a chat using the **Share** button is supported only in Salesforce Classic.

Create the custom field as a Text, Text Area, or Text Area (Long). The Rich Text Field option is not supported. Add this custom field to each article type that contains information that you want operators to access from the Knowledge One widget.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Create or edit an article type.
3. Click **New** in the Fields related list.
4. Select *Text*, *Text Area*, or *Text Area (Long)*.
Don’t select *Text Area (Rich)*.
5. Click **Next**.
6. Enter *Chat Answer* in Field Label.
Make sure that Field Name is populated automatically with Chat_Answer. (You can use a different name for the Field Label.)
7. Click **Next**.
8. Specify security settings, and then click **Next**.
Make the Chat Answer field visible to authors, editors, and live chat agents. Hide it from portal users or other users who don’t need access to it.
9. Select *Yes*, add this custom field to the layout, and then click **Save**.

SEE ALSO:

[Create Article Types](#)

EDITIONS

Live Agent is available in:
Salesforce Classic, Lightning
Experience

Live Agent is available in:
Performance Editions and
in **Developer** Edition orgs
that were created after June
14, 2012

Live Agent is available in:
Unlimited Edition with the
Service Cloud

Live Agent is available for an
additional cost in: **Enterprise**
and **Unlimited** Editions

USER PERMISSIONS

To set up the Knowledge
One widget:

- Customize Application
AND
Manage Knowledge

Add the Supervisor Panel to the Salesforce Console

Add the supervisor panel to the Salesforce console in Salesforce Classic to make your support supervisors' work easier. That way, supervisors can access information about their agents without having to switch between workspaces.

1. In Setup, enter `Apps` in the Quick Find box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the supervisor panel to.
3. In the Choose Navigation Tab Items section, add `Live Agent Supervisor` to the Selected Items list.
4. Click **Save**.

Add a Lookup Component for Chats Routed with Omni-Channel to the Salesforce Console

Provide agents with a sidebar lookup component in their Salesforce console so they can quickly look up or create associated records for chats. This component is only for chats using Omni-Channel routing, and can be used in Salesforce Classic only.

Before you add a sidebar component to the Salesforce console app, you need:

- A Salesforce console app with Live Agent and Omni-Channel added to it.
 - At least one chat button that uses the routing option **Omni**.
 - Edit access for Live Chat Transcript granted to agents handling chats routed through Omni-Channel.
1. From Setup, enter `Live Agent` in the Quick Find box, then select **Live Chat Transcripts > Page Layouts**.
 2. Click **Edit** next to the Live Chat Transcript (In Progress) Page Layout.
 3. Click **Custom Console Components**.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To set up Live Agent and manage apps:

- Customize Application

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

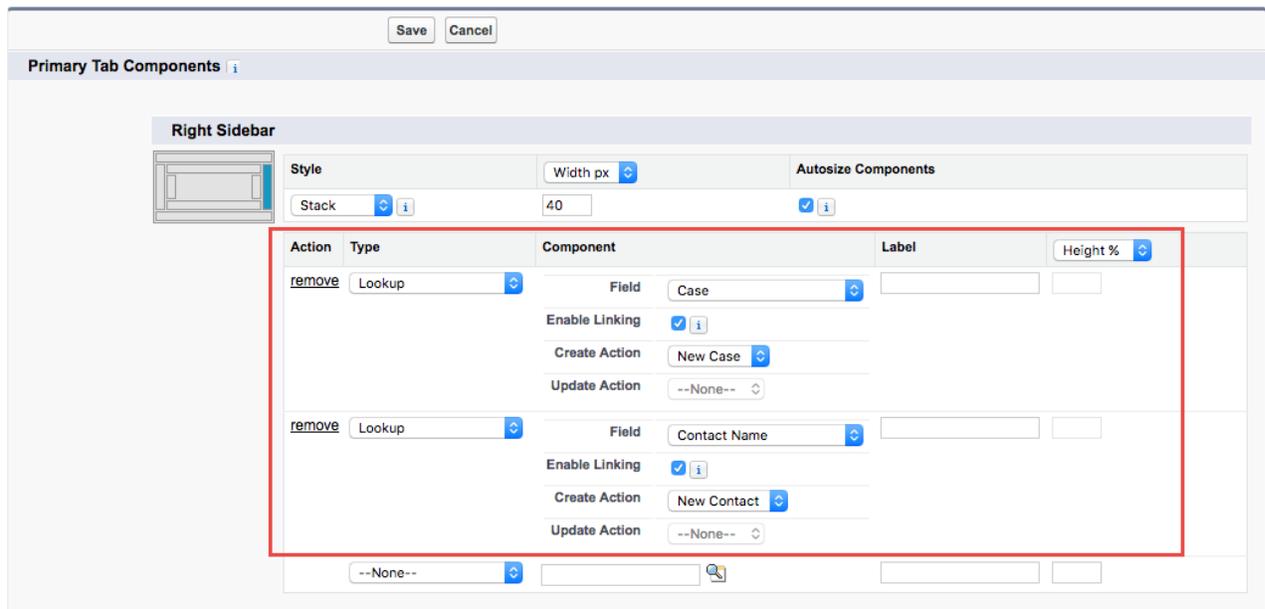
Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions



- Under Primary Tab Components, adjust your objects and other settings. Don't move the component to the left sidebar, as chats appear on the left side.



- Click **Save**. Agents can now link and unlink records using the sidebar component.

Sidebar Lookup Component with No Linked Records

The screenshot shows the Salesforce Live Chat Transcript interface for transcript ID 00000192. The main content area displays transcript details, including request time (8/8/2016 4:18 PM), queue (Chat Queue - Queue Disabled), and owner (Keenan Pepper). The transcript is in progress. The sidebar on the right contains three lookup components: Contact Lookup, Widget Lookup, and Case Lookup. Each component displays the message "No [Contact/Widget/Case] Is Linked" and includes a search input field. The bottom right corner of the interface shows the "Omni-Channel" logo.

Sidebar Lookup Component with Linked Contact Record

The screenshot shows the Salesforce Live Chat Transcript interface for transcript ID 00000192, similar to the first image. However, the "Attached Records" section in the main content area now lists a contact named "Harry Potter" with the account name "Lead". The sidebar lookup components are updated: "Contact Lookup" shows "Name: Mr. Harry Potter" and "Account Name" with a "View" link; "Case Lookup" has "Cancel" and "Save" buttons; and "Widget Lookup" remains empty. The bottom right corner shows the "Omni-Channel" logo.

Use Omni-Channel with Your Existing Live Agent Implementation

Are you loving Live Agent and want to add Omni-Channel to the mix? Here's what changes for you and your organization (and not for your agents!).

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

So, you've decided to take your customer service to the next level by using Live Agent and Omni-Channel in tandem. That's great! Once everything's set up, you'll find that the two work together in perfect harmony.

Live Agent is powered by Live Agent Configurations, which control the behaviors and settings that are available to Live Agent users. Similarly, Omni-Channel uses Presence Configurations to control the behaviors and settings that are available to Omni-Channel users. You can integrate Live Agent with Omni-Channel so chats are routed just like other work items, and you can even use Omni-Channel routing for your chats. Whichever way you use Omni-Channel with Live Agent, your agents are then able to accept or reject chat requests right from the Omni-Channel widget.

When you integrate Live Agent and Omni-Channel, your Live Agent users also become Omni-Channel users, so your chat agents need to be associated with both a Live Agent Configuration and a Presence Configuration. Luckily, Salesforce does some of the heavy lifting for you when you enable Omni-Channel with your current Live Agent implementation.

For each Live Agent Configuration that you already have in your org, Salesforce:

- Creates a corresponding Presence Configuration for each of your Live Agent Configurations
- Sets the chat capacity for each Presence Configuration to what's set in its corresponding Live Agent Configuration
- Assigns your chat agents to the new corresponding Presence Configurations

If you have Live Agent enabled but don't have an implementation, when you enable Omni-Channel, Salesforce creates a Live Agent Service Channel.

Salesforce does all this automatically so there's no disruption to your agents' workflow. They can start accepting chats through Omni-Channel in the console. The only difference they see is that they now use Omni-Channel in the console to set their status and accept chat notifications. They may also see a change in their status options, as Omni-Channel presence statuses are configurable.

If you want to use Live Agent and Omni-Channel in Lightning Experience, you must use Omni-Channel routing for your chats. All you have to do is create a chat button with the routing type Omni and assign your chat agents to queues. Then, add the Omni-Channel utility and Live Chat Transcripts to your Lightning Console app, and you agents can start accepting chat requests.

IN THIS SECTION:

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

[Compare Live Agent and Omni-Channel Routing for Chats](#)

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Compare Live Agent and Omni-Channel Routing for Chats

See the benefits and limitations of using Omni-Channel routing for chats or keeping Live Agent routing for chats. If you want to use Live Agent in Lightning Experience, you must use Omni-Channel routing.

Available in: Salesforce Classic, Lightning Experience

Omni-Channel is available in: **Professional, Essentials, Enterprise, Performance, Unlimited,** and **Developer** Editions

There's a lot to keep in mind as you decide whether to try Omni-Channel routing for chats. Omni-Channel routing for chats is enabled when you enable Live Agent for the first time, or when you create a chat button that uses the routing option **Omni**.

Let's compare the two routing model options when using Live Agent and Omni-Channel together.

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Agents must chat with customers in the console in Salesforce Classic.	Agents can chat with customers in the console in either Salesforce Classic or Lightning Experience.
Agents use the Omni-Channel widget in Salesforce Classic to handle their work.	Agents use the Omni-Channel widget in Salesforce Classic or the Omni-Channel utility in Lightning Experience to handle their work.
Agents use Omni-Channel Presence, including its configurable statuses.	Agents use Omni-Channel Presence, including its configurable statuses.
Use Omni-Channel sound notifications in the Presence Configuration for chats.	Use Omni-Channel sound notifications in the Presence Configuration for chats.
Agent capacity is set and consumed by Omni-Channel.	Agent capacity is set and consumed by Omni-Channel.
Chats are routed to agents using Skills.	Chats are routed to agents using Omni-Channel queues.
Chats can't be prioritized with Omni-Channel work, or relative to each other. Un-routed Omni-Channel items are always routed ahead of chats.	Chats are prioritized with Omni-Channel work, and can be prioritized relative to each other using queues.
Chats always have the size 1.	Chat size is configurable by queue.
Chat supervisors use the Live Agent Supervisor Panel to observe chats and assist agents with their chats.	Chat supervisors can view agent activity in Omni-Channel Supervisor, but they use the Live Agent Supervisor Panel to observe chats and assist agents with their chats. You must create a skill for agents handling chats routed with Omni-Channel to make them visible in the Live Agent Supervisor Panel.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Live Agent Routing (Salesforce Classic only)	Omni-Channel Routing
Reports and data for chats are separate from Omni-Channel data.	Chat data is included in Agent Work reports in addition to Live Agent reports.
The Live Chat Transcript is created when the chat ends.	The Live Chat Transcript is created when the chat is requested.
You can customize the Live Chat Transcript page layout for Ended chats.	In Salesforce Classic, you can customize the Live Chat Transcript page layout for Waiting, In Progress, and Ended chats. In Lightning Experience, you can customize Live Chat Transcript pages in the Lightning App Builder.
Agents associate records with the chat transcript only after the chat has ended.	Agents can associate records with the chat transcript during the chat. They have the option to do this on the chat transcript itself or use a console sidebar lookup component in Salesforce Classic.
Uses the Console Integration Toolkit Methods for Live Agent .	Uses the Console Integration Toolkit Methods for Omni-Channel for Salesforce Classic, or Omni-Channel Objects for the Lightning Console JavaScript API for Lightning Experience.

However, there are a few limitations to using Omni-Channel routing for chats:

- You can't transfer a chat from a button using Live Agent routing to a button using Omni-Channel routing.
- You can't use direct-to-agent routing with chats routed by Omni-Channel.
- You can't use chat conferencing with chats routed by Omni-Channel.
- Queues with multiple object types can cause problems when using Omni-Channel routing. We recommend creating a queue for each object type, such as Chats, Cases, and Leads, instead of setting queues to handle multiple object types.
- Chats routed with Omni-Channel can't use supervisor whisper messages and assistance flags with Omni-Channel Supervisor.
- When an agent uses "Transfer to Agent" for a chat routed with Omni-Channel and the receiving agent has an admin profile, the agent who initiated the transfer can lose visibility of the chat transcript until the receiving agent accepts the chat request. This situation occurs because Omni-Channel changes ownership of the chat transcript when the transfer is initiated, before the next agent accepts the chat.

Live Agent for Support Supervisors (Salesforce Classic)

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. This information applies only to Live Agent in Salesforce Classic.

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 for Salesforce Classic](#)

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 \(Salesforce Classic\)](#)

[Live Agent for Administrators](#)

[Permissions for Live Agent Support Supervisors](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

The Live Agent Supervisor Panel for Salesforce Classic

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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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 use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

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.
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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

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](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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 use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

To view agents' chats:

- Agent Sneak Peek Enabled in your Live Agent configuration

To send whisper messages to agents:

- Whisper Messages Enabled in your Live Agent configuration

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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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 assign skills:

- Assign Live Agent Skills to Users

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 in Salesforce Classic or the Reports tab in Lightning Experience.
3. Customize your report to include the columns of information you want to feature.
4. Save or run the report.

SEE ALSO:

[Create a Report](#)

[Build a Report in Salesforce Classic](#)

[Live Agent Session Records](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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, edit, and delete reports:

- Create and Customize Reports
- AND
- Report Builder

Live Agent for Support Agents (Salesforce Classic)

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers. This information applies only to Live Agent in Salesforce Classic.

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. This information applies to chats routed with Live Agent routing only.

[View Customer Records in the Salesforce Console](#)

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents. View these records in the console in Salesforce Classic.

SEE ALSO:

[Live Agent for Support Supervisors \(Salesforce Classic\)](#)

[Live Agent for Administrators](#)

[Permissions for Live Agent Support Agents](#)

EDITIONS

Live Agent is available in: **Salesforce Classic**, **Lightning Experience**

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 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.

[Send Quick Text Messages in Chats](#)

Send chat customers predefined messages to respond more quickly. You can create quick text for greetings, notes, answers to common questions, and more.

[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 in a Salesforce console app.

[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

Live Agent is available in: Salesforce Classic, Lightning Experience

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:

- 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.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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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

EDITIONS

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Chat with Customers

Accept incoming chat requests to begin chatting with customers in a Salesforce console app.

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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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

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**.

EDITIONS

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Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To search for and view a record:

- Read on the object
- AND
- Create on Live Chat Transcripts

To create a new record:

- Create on the object
- AND
- Create on Live Chat Transcripts

To edit a record:

- Edit on the object
- AND
- Create on Live Chat Transcripts

To delete a record:

- Delete on the object
- AND
- Create on Live Chat Transcripts

Send Quick Text Messages in Chats

Send chat customers predefined messages to respond more quickly. You can create quick text for greetings, notes, answers to common questions, and more.

 **Note:** If you don't have access to quick text, contact your Salesforce admin.

1. While chatting with a customer, open the quick text browser.
 - In Salesforce Classic, on Mac OS or Windows, type ; ; in the message field.
 - In Lightning Experience, type one of the following commands in the message field.
 - Mac OS: `Cmd+.`
 - Windows: `Ctrl+.`

A list of quick text messages displays. Recently used messages display first.
2. To see additional quick text messages, 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, hover over it or highlight it using the arrow keys on your keyboard.

The full message displays in the preview panel.
4. To select a message and add it to your chat, click it or use your keyboard to highlight it and then press Enter.
5. To send the message, click **Send** or press Enter on your keyboard.

SEE ALSO:

[Create Quick Text Messages](#)

EDITIONS

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USER PERMISSIONS

To access quick text while chatting with visitors in Live Agent:

- [Read on Quick Text](#)

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 encounters an error when trying 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. Because 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.

The file size can't exceed 5 MB.

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

EDITIONS

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USER PERMISSIONS

To use the Salesforce console:

- Live Agent is enabled and set up

AND

Live Agent is set up in a Salesforce console app

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 Salesforce Knowledge and your Salesforce admin has included the tool in your Salesforce app.

 **Note:** Attaching articles to a chat using the **Share** button is supported only in Salesforce Classic.

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  or press ENTER.
 - Alternatively, click  at the top of the widget to search all articles, including articles 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. To send the article to the visitor, click **Send** or press ENTER on your keyboard.

 **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.

SEE ALSO:

[Set Up Chat Answers from Knowledge Articles](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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 search for and view an article:

- Read on the article type

Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers in a Salesforce console app.

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](#)

EDITIONS

Live Agent is available in:
Salesforce Classic, Lightning
Experience

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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 search for and view a
record:

- Read on the object
- AND
- Create on Live Chat
Transcripts

To create a new record:

- Create on the object
- AND
- Create on Live Chat
Transcripts

To edit a record:

- Edit on the object
- AND
- Create on Live Chat
Transcripts

To delete a record:

- Delete on the object
- AND
- Create on Live Chat
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.

EDITIONS

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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

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. This information applies to chats routed with Live Agent routing only.

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.

EDITIONS

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USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

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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 to her, and your chat workspace closes.	Yes
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.

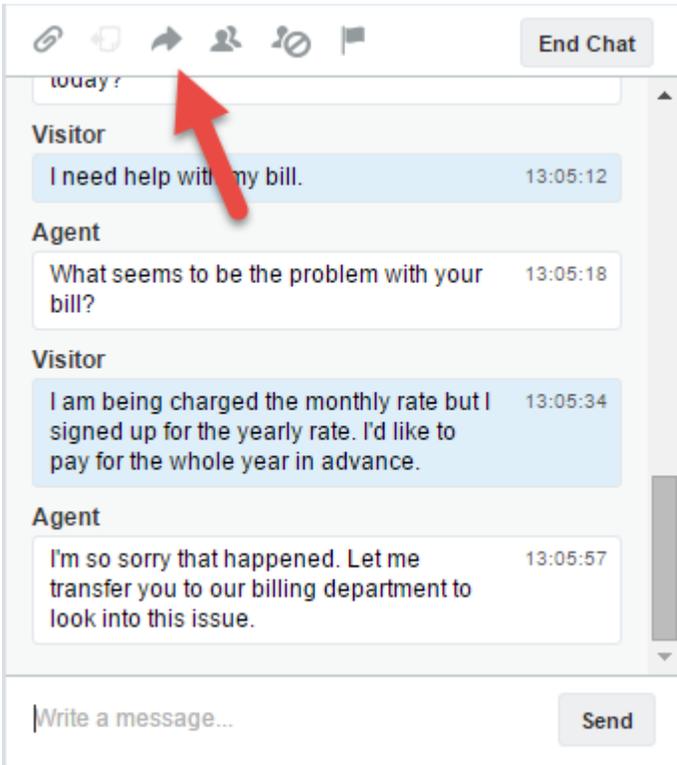
[Request Help with a Chat](#)

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.

EDITIONS

Live Agent is available in:
Salesforce Classic, Lightning
Experience

Live Agent is available in:
Performance Editions and
in **Developer** Edition orgs
that were created after June
14, 2012

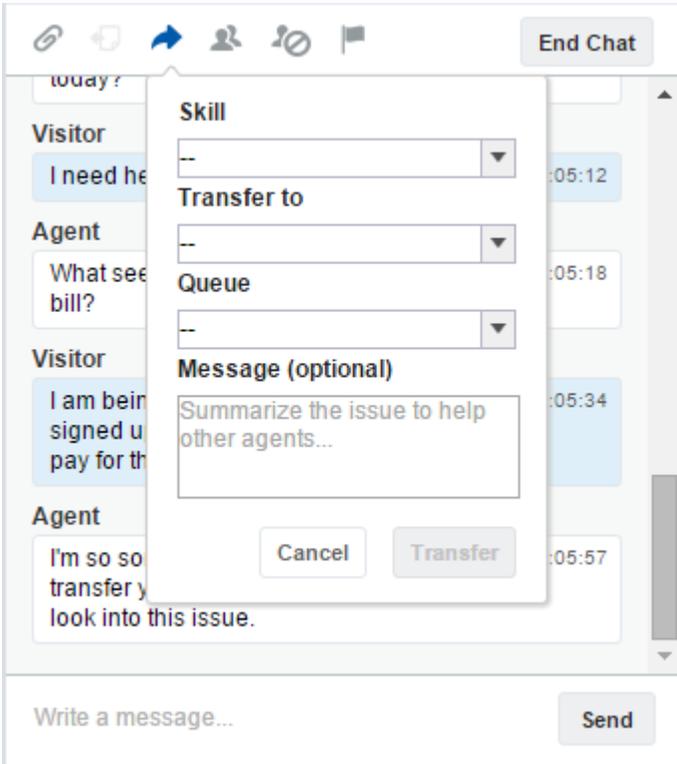
Live Agent is available in:
Unlimited Edition with the
Service Cloud

Live Agent is available for an
additional cost in: **Enterprise**
and **Unlimited** Editions

USER PERMISSIONS

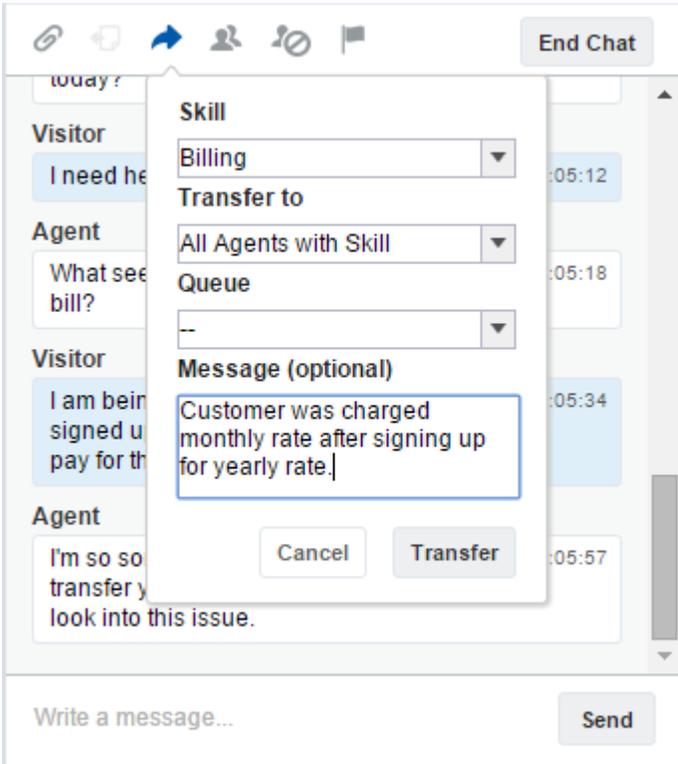
To chat with visitors in Live
Agent in the Salesforce
console:

- Live Agent is enabled, set up, and included in a Salesforce console app



 **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](#).

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

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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

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View Customer Records in the Salesforce Console

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents. View these records in the console in Salesforce Classic.

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](#) on page 237.

EDITIONS

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USER PERMISSIONS

To view customer records:

- Read on the record type

For agents to use Live Agent:

- API Enabled administrative permission

EDITIONS

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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.

SEE ALSO:

[Create and Update Records](#)

[Delete Records](#)

[Update Records](#)

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. When you're using Omni-Channel routing, the chat transcript is created when the chat's requested by a visitor.

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. For chats using Live Agent routing, it can take up to 30 minutes to create the transcript if a chat is disconnected or experiences another error.

IN THIS SECTION:

[Live Agent Transcript Fields](#)

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

EDITIONS

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Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

[Live Agent Transcript Events](#)

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

SEE ALSO:

[Create and Update Records](#)

[Delete Records](#)

[Update Records](#)

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 before the unanswered chat request was disconnected
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.

EDITIONS

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Field	Definition
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
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	<p>Unique, numerical identifier automatically assigned to the transcript.</p> <p>Administrators can modify the format and numbering for this field. Transcript numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.</p>
Live Chat Visitor	<p>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.</p> <p>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.</p>
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	<p>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).</p> <p>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.</p>
Platform	The user's operating system
Referring Site	<p>Site the visitor was on before they came to your website.</p> <p>For example, if the visitor used Google to search for your support organization's website, the referring site is Google.</p>

Field	Definition
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
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

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

Event	Description
Transfer Accepted	Chat transfer was accepted by agent
Transfer Request Canceled	Chat transfer request was canceled by the agent who sent the request
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

Set Up Live Agent in Lightning Experience

Set up Live Agent so that your support agents use a Lightning console app to chat with customers. Then, add Snap-ins Chat and Einstein Bots to give your agents and customers the best web chat experience.

Get to Know Live Agent in Lightning Experience

We captured the best of Live Agent and gave it a whole new look and feel in Lightning Experience. You don't even have to regenerate your deployment code if you already use Omni-Channel routing for chats. Live Agent routing isn't supported in Lightning Experience. Instead, you must route chats with Omni-Channel to chat in Lightning Experience.

Feature Gaps and Expected Behavior for Live Agent in Lightning Experience

Live Agent looks and functions differently in Lightning Experience. The following list identifies feature gaps and expected behavior and can help your agents adjust to the changes.

Set Up Live Agent in Lightning Experience



Note: You have two options for setting up Live Agent chat in Lightning Experience.

- Use a guided setup flow to create a basic implementation, then customize it to your liking. The setup flow gets you started with Omni-Channel routing for chats, Live Agent, and Snap-ins Chat.

Set Up Live Agent with a Guided Setup Flow

Get started with live web chat in Lightning Experience with a quick guided setup flow. Create a chat queue on Omni-Channel, select your chat agents, and get the Snap-ins code snippet to add chat to your website.

- Manually create a custom implementation.

If you've already set up Live Agent in Salesforce Classic, you can review your configuration for Lightning Experience optimization.

Set Up Omni-Channel Routing for Chats

Live Agent in Lightning Experience uses Omni-Channel to route incoming chats to your support agents. Before you set up Live Agent, make sure that Omni-Channel is ready to handle chats with a service channel for chats, a chat queue with an associated routing configuration, and presence statuses that let your agents receive chats.

Specify Live Agent Settings

Choose your chat settings for the agents using Lightning Experience and create a chat button that uses Omni-Channel routing.

Add Live Agent to the Console in Lightning Experience

Add Live Agent to a Lightning console app so agents and supervisors can chat with customers.

Extend Your Web Chat Implementation with Snap-Ins Chat and Einstein Bots

After you've set up Live Agent and Omni-Channel to work together in Lightning Experience, give your customers a better chat experience with Snap-ins Chat and Einstein Bots. Snap-ins Chat lets you create a pre-chat form and custom branding with little to no code. Embed the snap-in on your website and both your desktop and mobile customers can have the same chat experience. Einstein Bots lets you connect customers to an automated chat bot to answer questions and solve straightforward issues.

Live Agent in Lightning Experience

We captured the best of Live Agent and gave it a whole new look and feel in Lightning Experience. You don't even have to regenerate your deployment code if you already use Omni-Channel routing for chats. Live Agent routing isn't supported in Lightning Experience. Instead, you must route chats with Omni-Channel to chat in Lightning Experience.

Meet the New Agent Chat Window

Agents get a larger chat window so they have more room to use the chat features they know and love. There's also a new chat header that helps agents jump in and out of their chats seamlessly.

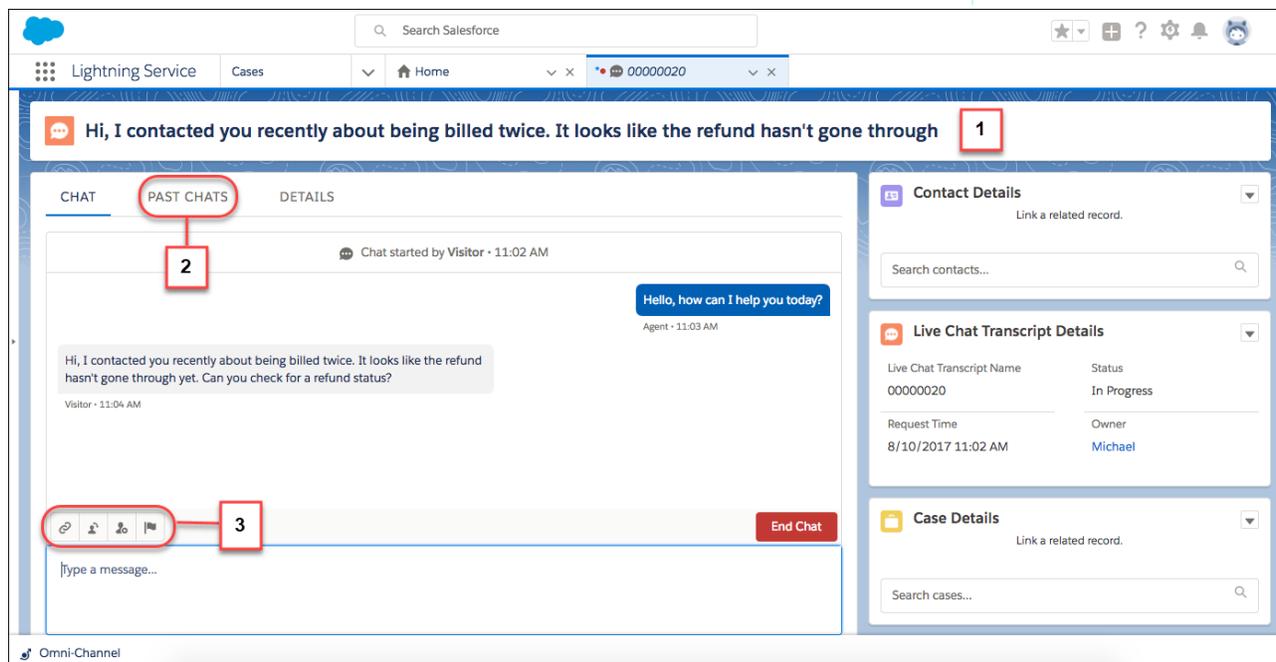
EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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



The larger chat area is in the center of the console by default. The first 100 characters of the customer's message appear in the chat header, so agents can quickly differentiate between all their in-progress chats (1). The Past Chats tab is included in the default layout so agents can quickly refer to previous chats with a customer (2). An enhanced toolbar with popovers contains all the chat features your agents already know and love (3).

You can control the placement and height of the agent chat window, too. Place the Chat Body component wherever you want in the console by opening a chat transcript record and editing the live page. Or, you can create a custom record page in Lightning App Builder. Then, you can keep the default height of 500 px or change it to whatever fits your agents' screens best.

Your agents can use Past Chats to get instant context while they're chatting with a customer. Past Chats uses the contact record attached to a chat to find previous chats with the same customer. Agents can't see any records attached to the previous chats, but they can read the full transcripts. Your default transcript record home has past chats already included as a tab component with the chat body. You can easily place the component directly on the page so your agents can keep it visible all the time.

The screenshot displays the Salesforce Live Agent interface. At the top, there's a search bar for Salesforce and navigation tabs for Lightning Service, Cases, and Home. A chat window is open for contact ID 00000020. The chat header reads: "Hi, I contacted you recently about being billed twice. It looks like the refund hasn't gone through". Below this, there are three tabs: CHAT, PAST CHATS (selected), and DETAILS. The chat transcript shows a conversation starting on Mar 30, 2016 at 10:46 AM, ending on Mar 30, 2016 at 10:48 AM. The transcript includes messages from an Agent and a Visitor. To the right of the chat, there are two detail panels: "Contact Details" and "Live Chat Transcript Details".

Name	Angela Peng
Title	Account Name
Email	apeng@peng.solutions
Phone	

Live Chat Transcript Name	Status
00000020	In Progress
Request Time	Owner
8/10/2017 11:02 AM	Michael

At the bottom of the interface, there is a "Case Details" panel and an "Omni-Channel" indicator.

Popovers Immerse Agents in Live Agent Features

The enhanced toolbar uses popovers to improve agents' workflow when using chat features. The popovers provide a similar experience to Salesforce Classic, but the file transfer and chat transfer features use waiting screens. These waiting screens let agents know when they're waiting for the visitor or their team to respond.

The popovers can be closed without canceling the process. Agents can use the close button or click the icon again to hide the popover. To cancel the action, they can reopen the popover and use the cancel button.

Feature Gaps and Expected Behavior for Live Agent in Lightning Experience

Live Agent looks and functions differently in Lightning Experience. The following list identifies feature gaps and expected behavior and can help your agents adjust to the changes.

The following feature gaps apply for Live Agent in Lightning Experience:

- You must route chats with Omni-Channel to chat in Lightning Experience. Make sure that you have Omni-Channel ready for Lightning Experience and have set up your chat button to route with Omni-Channel.
 - Considerations for Omni-Channel routing for chats apply. See [Compare Live Agent and Omni-Channel Routing for Chats](#) for more information.
- Chat features aren't available in Omni-Channel Supervisor. Support supervisors can use Live Agent Supervisor in Salesforce Classic for chat monitoring features, even when agents are using Omni-Channel routing. Create a skill for agents handling chats routed with Omni-Channel, and their chats appear in Live Agent Supervisor alongside chats routed with Live Agent routing.
- Live Agent settings, including the Live Agent and Omni-Channel setup pages, are available only in Salesforce Classic.
- Hovering over a chat request doesn't show custom details in Lightning Experience.
- The Recently Viewed Pages list view isn't available in Lightning Experience.
- Some Console API methods for Live Agent aren't supported with Omni-Channel routing or with Lightning Experience.
- File previewing isn't used with File Transfer in Lightning Experience. Instead, files are downloaded to the agent's computer.
- Agents can encounter Unsupported Item tabs when opening Live Agent records that aren't yet supported in Lightning Experience. They can view these records in Salesforce Classic.
- When chatting with customers, we recommend that you open Live Chat Transcripts as primary tabs, not subtabs. Don't set custom navigation rules for Live Chat Transcripts if you plan to chat.

Expected behavior for chat notifications:

- The visual indications for when a tab contains an active chat, when there's an unread message, and when the Critical Wait Alert Time has passed are different in Lightning Experience than in Salesforce Classic.
- **Active chat indicators:** In Lightning Experience, a blue asterisk appears on a chat tab that contains an active chat. In Salesforce Classic, a black asterisk appears on a chat tab that contains an active chat.
- **New unread message notifications:** In Lightning Experience, a red dot appears in the chat tab and the chat tab turns blue and blinks three times when a customer sends a message that the agent hasn't read yet because the agent is on a different tab. In Salesforce Classic, the tab turns yellow.
- **Critical Wait Alert Time notifications:** In Lightning Experience, the Critical Wait Alert Time setting isn't supported. In Salesforce Classic, the tab turns red when the critical wait alert time has passed.

Expected behavior for attachments:

- In Lightning Experience, files are attached to records by using the Salesforce Files object. In Salesforce Classic, files are attached to records using the Attachments object. Agents can see both Files object and Attachment object files in the Attachments related list on the related record.
- Agents using Lightning Experience can preview files that are sent or received as chat attachments in their web browser.

Expected behavior for the Lightning Knowledge component:

- You can use the Lightning Knowledge component with chat by adding the Knowledge component to the page layout. Agents can manually search for articles by entering keywords into the Knowledge component search bar and can view articles in a subtab.

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

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

- The Knowledge component doesn't automatically search for articles by keywords used in the chat in Lightning Experience.
- Knowledge keyword searches using the Live Agent prechat form and deployment API aren't supported in Lightning Experience.
- Agents can't use the **Share** button to attach articles to chats in Lightning Experience. As a workaround, agents can copy and paste the text from the article into the chat.

Expected behavior for file transfer:

- File transfer still requires a record attached to the chat transcript. If the currently attached records aren't right, the agent can use a lookup field to search for records by object type or create a record.
- When a customer or chat visitor uploads a file, it's displayed as a link in the chat. When the agent clicks the link, the file is downloaded based on the agent's browser settings.

Expected behavior for chat transfer:

- The receiving agent can't preview the message from the sending agent before accepting the chat transfer in the Omni-Channel utility. Agents can view the message only after accepting the transfer.
- The receiving agent can see the transcript with the sending agent, just like in Salesforce Classic. However, the appearance of the chat bubbles is different. The chat bubbles from the sending agent are displayed in a different color in Lightning Experience, which helps the receiving agent navigate the chat.

Set Up Live Agent with a Guided Setup Flow

Get started with live web chat in Lightning Experience with a quick guided setup flow. Create a chat queue on Omni-Channel, select your chat agents, and get the Snap-ins code snippet to add chat to your website.

The Live Agent setup flow is the fastest and easiest way to get up and running with live web chat. When you complete the flow, you're ready to go online in the console and start chatting.

This setup flow sets up Live Agent for Lightning Experience. This means that it also sets up Omni-Channel to route your chats. And for the best end-user experience, it also gets you started with Snap-ins Chat.

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking



and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Setting up chat routing with Omni-Channel
- Specifying the website where you want customers request a chat
- Using the Snap-ins Chat code snippets to allow chat on your website



Note: We named a few of these objects for you.

We also turn on several things in the background during the setup flow.

Enabling Live Agent and Omni-Channel

We turn on Live Agent and Omni-Channel if you haven't already. When Live Agent is enabled, Salesforce creates a default Live Agent configuration, which defines settings for your chat agents.

Service Channel for Chats

Service channels let you choose which objects you want to route in Omni-Channel. We create one for chats so your Live Agent chats can get to an agent.

Basic Omni-Channel Setup

We give you a basic Omni-Channel implementation that's ready to route chats.

- A queue enabled for chat, to hold incoming chats until they're routed to an agent
- A routing configuration and presence configuration, which work in tandem to control your agents' workload and set the priority for chats in your queue

Assigned User Licenses

We assign Service Cloud User and Live Agent User licenses to the users you select during the flow. These users are also granted the necessary user permissions to chat with customers in the console.

Presence Statuses

Presence statuses are what agents use to go online in Omni-Channel. We create three presence statuses for your agents to use: Chat, On Break, and Busy. The Chat status makes the agent available to accept chats only.

Permission Set with Presence Statuses Assigned to Users

To make sure your agents have access to the presence statuses we create, we make a permission set that assigns the presence statuses to the users you select in the setup flow. The permission set is called Live Agent Setup Flow (with developer name Live_Agent_Setup_Flow).

Live Agent Deployment and Chat Button

We create a Live Agent deployment with default settings. We also create a Live Agent chat button, which is named based on what you name the group of agents you assign to the chat queue. These objects are used to connect Live Agent to Snap-ins Chat.

Snap-ins Chat Deployment

Your Snap-ins Chat deployment uses your Live Agent deployment and chat button to provide a snap-in that you embed in your website. We create a Snap-ins Chat deployment with default settings and branding selection.

Salesforce Site

If you don't have an existing Community or Salesforce site, we create one for you after you provide the naming convention.

Omni-Channel Utility

We add the Omni-Channel utility to your default Lightning Console app. This allows your agents to go online and accept incoming chat requests in Omni-Channel.

SEE ALSO:

[Get Started with Service Setup](#)

Live Agent Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Live Agent setup flow.

After completing the setup flow, you're ready to offer live web chat to your customers. But before you open the floodgates, we recommend testing your chat implementation and exploring more Live Agent, Omni-Channel, and Snap-ins Chat features.

Test it Out

Check out what you just built. Go to your default Lightning console app and change your Omni-Channel status to Chat. Then, open the web page where you placed your Snap-ins code snippet and request a chat.

 **Note:** If you didn't add yourself as an agent during the setup flow, you can add yourself to the permission set we created for you.

Dive Into Omni-Channel Features

Your Omni-Channel settings have much more to offer than what we turned on for you. Go to your Omni-Channel settings in Setup to turn on productivity-boosting features like decline reasons and push time-out.

You can create statuses that make the agent available for one or more work types at a time. For example, you can have a presence status that makes the agents available for chats and another for cases and chats. To create and edit presence statuses, go to Setup in Salesforce Classic and enter Omni-Channel in the Quick Find box. Then, select Presence Statuses. To assign presence statuses to you and your team, you can use permission sets or profiles.

You can add Omni-Channel to any console app. Simply edit or create a new console app in the App Manager, or in you app settings in Salesforce Classic Setup.

Brand Your Chats

Update the colors, font, and branding images (like a logo and agent avatar) to the snap-in over in Snap-ins Setup in Lightning Experience. Adding your own personal touch to the snap-in gives your customers a seamless chat experience.

Use Pre-Chat to Gather Information

Snap-ins Chat gives you a declarative way to create a pre-chat form so you can get some basic information about your customer and their issue when they request the chat. Go to Snap-ins Setup in Lightning Experience to edit your deployment and customize your pre-chat form.

Customize Snap-ins Chat with Code

The Snap-ins code snippet we gave you in the flow is what's generated by default when you set up Snap-ins Chat manually. You can add parameters to the code snippet, pre-populate fields on the pre-chat form, connect an automated invitation, create custom chat events, and more using JavaScript. Plus, you can create Lightning components that customize the user interface of the snap-in.

SEE ALSO:

[Omni-Channel for Administrators](#)

[Trailhead: Omni-Channel Basics](#)

[Live Agent in Lightning Experience](#)

[Customize the Branding and Appearance of Your Snap-In](#)

[Customize the Pre-Chat Form](#)

[Snap-Ins for Web Developer Guide](#)

Set Up Omni-Channel Routing for Chats

Live Agent in Lightning Experience uses Omni-Channel to route incoming chats to your support agents. Before you set up Live Agent, make sure that Omni-Channel is ready to handle chats with a service channel for chats, a chat queue with an associated routing configuration, and presence statuses that let your agents receive chats.

SEE ALSO:

[Customize Omni-Channel](#)

[How Does Omni-Channel Queue-Based Routing Work?](#)

[Add the Omni-Channel Utility to a Lightning Console App](#)

[Omni-Channel Utility for Lightning Console Apps](#)

Specify Live Agent Settings

Choose your chat settings for the agents using Lightning Experience and create a chat button that uses Omni-Channel routing.

SEE ALSO:

[Create Live Agent Users](#)

[Live Agent Configuration Settings](#)

[Live Agent Deployment Settings](#)

[Chat Button Settings](#)

Add Live Agent to the Console in Lightning Experience

Add Live Agent to a Lightning console app so agents and supervisors can chat with customers.

Before you add Live Agent to a Lightning console app, you need to enable Live Agent and create a basic implementation. You need to create a Lightning console app for service if you don't have one set up. You also need to have Omni-Channel set up along with a chat button or Snap-ins Chat implementation using Omni-Channel routing.

1. From Setup in Lightning Experience, enter *apps* in the Quick Find box, then select **App Manager**.
2. Click the dropdown next to the console app you want to add Live Agent to, then click **Edit**.
3. If your console doesn't have the Omni-Channel utility, go to Utility Bar and add it.
4. Under Selected Items, add Live Chat Transcripts to the Selected Items list.
5. Under Assign to User Profiles, select the profiles you want to add to this console.
6. Click **Save**.
7. Click **Done**.

Extend Your Web Chat Implementation with Snap-Ins Chat and Einstein Bots

After you've set up Live Agent and Omni-Channel to work together in Lightning Experience, give your customers a better chat experience with Snap-ins Chat and Einstein Bots. Snap-ins Chat lets you create a pre-chat form and custom branding with little to no code. Embed the snap-in on your website and both your desktop and mobile customers can have the same chat experience. Einstein Bots lets you connect customers to an automated chat bot to answer questions and solve straightforward issues.

SEE ALSO:

[Integrate with Service Feature Snap-ins for Websites and Mobile Apps](#)

[Einstein Bots for Service Cloud](#)

EDITIONS

Live Agent is available in: Salesforce Classic, Lightning Experience

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To add Live Agent to a Lightning console app:

- [Customize Application](#)

Snap-Ins Chat

Add Snap-ins Chat to your website so customers can quickly get answers to their questions by chatting with an agent while browsing your site. Snap-ins Chat uses Live Agent, but with a simpler setup, to power your chats.

The chat snap-in sits unobtrusively on the web page. When customers want to chat, they just click the button to launch the chat.

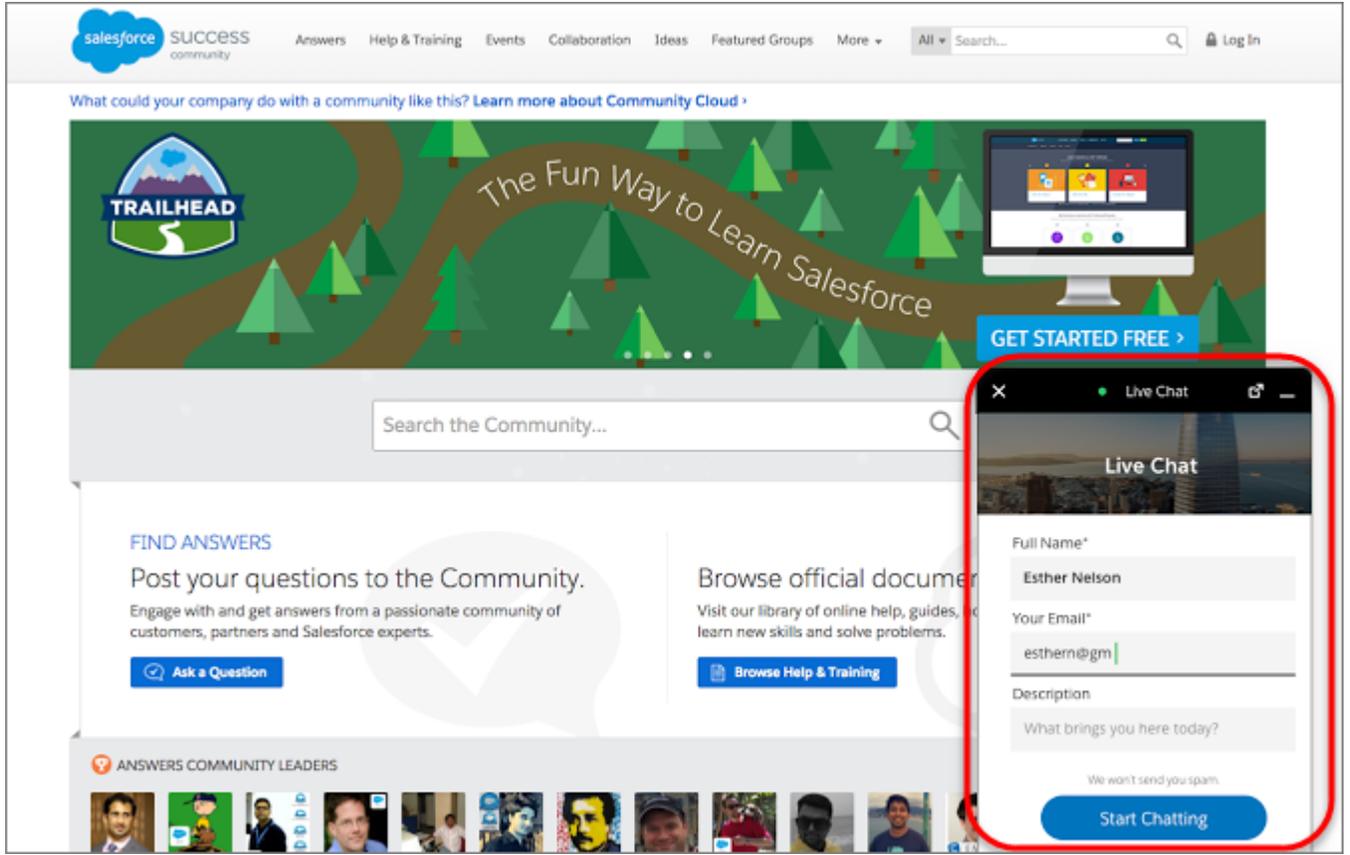
EDITIONS

Snap-ins setup node is available in: Lightning Experience

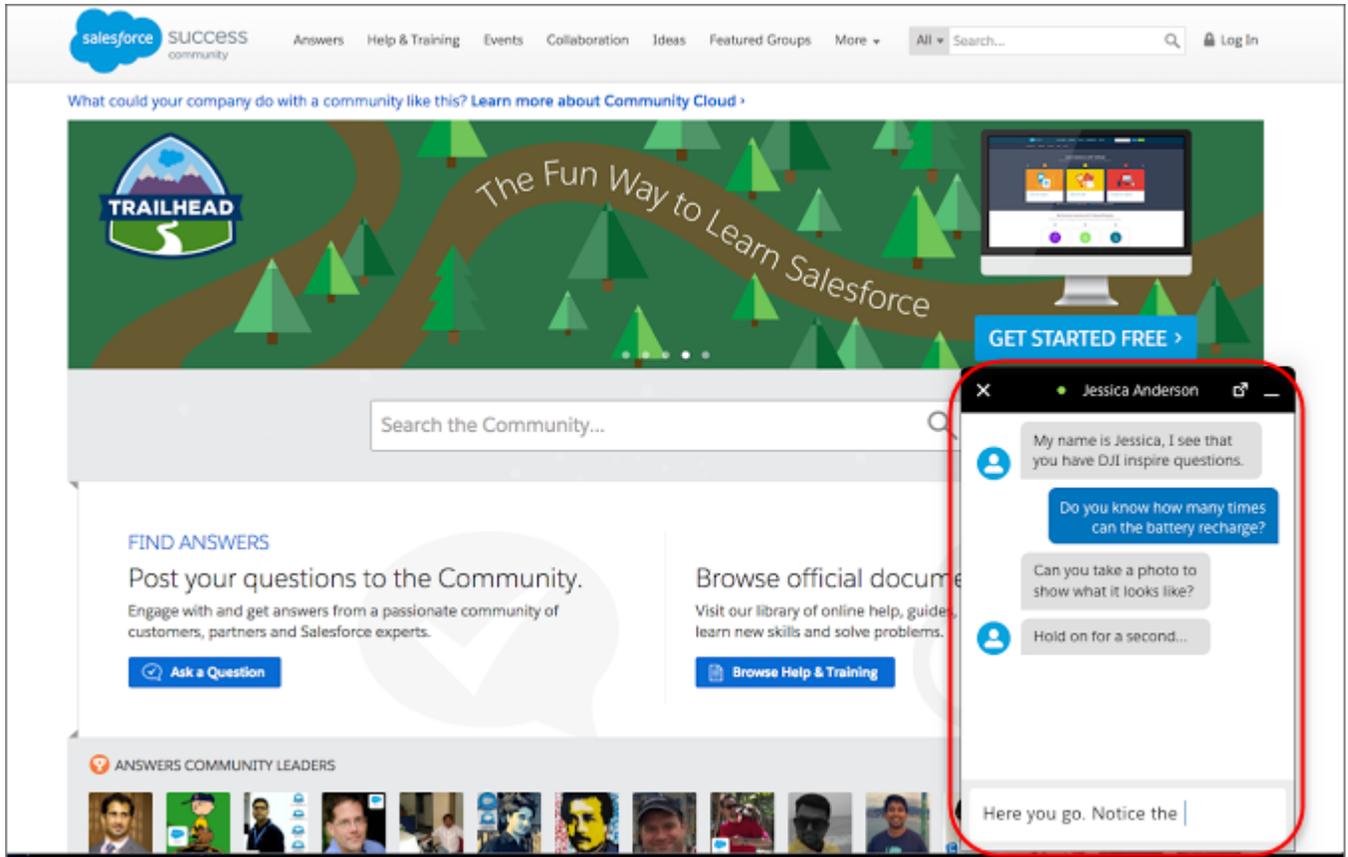
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** Editions

The screenshot displays the Salesforce Trailhead community interface. At the top, there is a navigation bar with the Salesforce logo, 'SUCCESS community', and various menu items like 'Answers', 'Help & Training', 'Events', 'Collaboration', 'Ideas', 'Featured Groups', and 'More'. A search bar and a 'Log In' link are also present. Below the navigation bar is a banner for Trailhead with the text 'The Fun Way to Learn Salesforce' and a 'GET STARTED FREE >' button. A search bar for the community is located below the banner. The main content area is divided into two sections: 'FIND ANSWERS' with a sub-heading 'Post your questions to the Community.' and a button 'Ask a Question', and 'Browse official documentation.' with a button 'Browse Help & Training'. At the bottom, there is a section for 'ANSWERS COMMUNITY LEADERS' with a row of profile pictures. A blue button labeled 'Chat with an Expert' is circled in red in the bottom right corner of the page.

Customers fill out the brief pre-chat form, which helps agents gather basic information about the customer, like their contact information, and their needs.



Customers can start chatting while viewing your web page and can minimize the chat window as they browse, so it's not in their way. The snap-in persists across your web pages and their subdomains, so customers can continue browsing other pages on your site while chatting with an agent.



Snap-ins Chat uses a Live Agent deployment that you can quickly configure. Then, simply add the chat code to the web pages where you want the chat snap-in to be available. When agents chat with customers via Snap-ins Chat, the agents use Live Agent in their console.

IN THIS SECTION:

[Set Up Snap-Ins Chat for Your Website](#)

Ensure that your org meets the following prerequisites before starting to set up Snap-ins Chat. Follow these steps to configure the chat snap-in and add it to your web pages. The setup node for Snap-ins Chat is available only in Lightning Experience.

[Localization and Translation for Snap-Ins Chat](#)

The primary language for a chat snap-in is set differently when Translation Workbench is enabled or disabled.

[Snap-Ins Chat Limitations](#)

Snap-ins Chat has the following limitations.

Set Up Snap-Ins Chat for Your Website

Ensure that your org meets the following prerequisites before starting to set up Snap-ins Chat. Follow these steps to configure the chat snap-in and add it to your web pages. The setup node for Snap-ins Chat is available only in Lightning Experience.

To set up Snap-ins Chat, your org must meet these prerequisites:

- [Lightning Experience must be enabled](#) to set up snap-ins
- Service Cloud License
- Live Agent License
- [Live Agent must be enabled](#) in your org
- A Live Agent chat button and a Live Agent deployment must be set up and available in your org
- A [Salesforce Community](#) (preferable) or a [Lightning Platform site](#) must be set up on your org and available for guest user access
- Ensure your browsers are supported for Snap-ins Chat. We support the same browsers as Lightning Communities. See [Browser Support for Communities](#) for more information.

 **Note:** Administrators must use Lightning Experience to access the Snap-ins setup pages. However, other users in the org aren't required to have access to or use Lightning Experience with Snap-ins Chat.

To set up Snap-ins Chat, follow these steps:

IN THIS SECTION:

1. [Add Your Website to the CORS Whitelist](#)
Add the URLs of the web pages where you intend to add the snap-in to the CORS whitelist in your org. The web page where you add the snap-in is the page that customers use to access chat.
2. [Create a Snap-Ins Deployment](#)
Create a Snap-in deployment for each snap-in that you're using. The setup node for Snap-ins Chat is available only in Lightning Experience.
3. [Specify the Live Agent Settings for Your Snap-Ins Chat Deployment](#)
Snap-ins Chat uses a Live Agent deployment ID and button so customers can chat with your agents. The Live Agent details that you provide are used to generate the chat code snippet that you add to your web pages.
4. [Customize the Branding and Appearance of Your Snap-In](#)
Select the colors and font used in your snap-in to reflect your company's brand identity.
5. [Customize Labels for Snap-Ins Chat](#)
You can customize most of the field labels for your snap-ins from either Lightning Experience or Salesforce Classic.
6. [Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages](#)
Salesforce generates a unique code snippet based on the information you provided during the Snap-ins Chat setup. Copy and paste the chat code snippet so you can add the snap-in to your web pages. Copy and paste the optional meta tag code snippet to make your web pages responsive to different form factors such as mobile and desktop.
7. [Customize the Snap-Ins Code Snippet](#)
Use a text or HTML editor to customize the optional parameters in the Snap-ins code snippet.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- [Customize Application](#)

8. [Test the Snap-Ins Chat Experience](#)

Now that you've added Snap-ins Chat to your web pages, it's time to test it out.

SEE ALSO:

[Turn on Lightning Experience for Your Org](#)

[Supported Browsers for Lightning Experience](#)

Add Your Website to the CORS Whitelist

Add the URLs of the web pages where you intend to add the snap-in to the CORS whitelist in your org. The web page where you add the snap-in is the page that customers use to access chat.

You can use HTTP and HTTPS domains with Snap-ins Chat. The protocol for the URL that you whitelist must match the URL in the site or community endpoint in the code snippet that's generated at the end of Snap-ins setup.

! **Important:** This information applies to Snap-ins only. If you want to use the CORS whitelist for other Salesforce products and features, see [Use CORS to Access Salesforce Resources from Web Browsers](#).

1. From Setup, enter `CORS` in the Quick Find box, then select **CORS**.
2. Select **New**.
3. Enter an origin URL pattern.

The origin URL pattern must include the HTTP or HTTPS protocol and a domain name. The origin URL pattern can include a port. The wildcard character (*) is supported and must be in front of a second-level domain name. For example, `https://*.example.com` adds all subdomains of `example.com` to the whitelist.

The origin URL pattern can be an IP address. However, an IP address and a domain that resolve to the same address are not the same origin, and you must add them to the CORS whitelist as separate entries.

Create a Snap-Ins Deployment

Create a Snap-in deployment for each snap-in that you're using. The setup node for Snap-ins Chat is available only in Lightning Experience.

The Snap-ins Chat setup uses a Salesforce Community or Lightning Platform site, so that you can associate users with a guest user profile. Check if you already have any communities or sites that you can use. If a site is already available, you can use that as your endpoint. Otherwise, create a site for this purpose.

1. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins**.
2. In the Snap-ins configuration page, click **New Deployment**.
3. In the `Snap-in Deployment Name` field, enter a name for your snap-in.

The deployment name is shown in the list of snap-ins on the Snap-in page. If you have several snap-in deployments, use a descriptive name so it's easy to distinguish this snap-in from other snap-ins.

4. The `API Name` field is automatically populated.
5. In the `Site Endpoint` menu, select a Salesforce community or Lightning Platform site from the dropdown list.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

If nothing appears in the menu, it's because there aren't any communities or sites configured in your org.

6. Click **Save**.

SEE ALSO:

[Specify the Live Agent Settings for Your Snap-Ins Chat Deployment](#)

Specify the Live Agent Settings for Your Snap-Ins Chat Deployment

Snap-ins Chat uses a Live Agent deployment ID and button so customers can chat with your agents. The Live Agent details that you provide are used to generate the chat code snippet that you add to your web pages.

Before you specify the Live Agent settings, ensure that you have a Live Agent deployment and a Live Agent chat button available to use with Snap-ins Chat.

1. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with by clicking the arrow beside the deployment name and selecting **View**.
3. In the Snap-ins configuration page, go to the `Live Agent settings` section and click **Start**.
4. In the `Live Agent Deployment` menu, select the Live Agent configuration that you want to use with the chat snap-in from the dropdown list.
5. In the `Live Agent Button` menu, select the Live Agent chat button or automated invitation that you want to use with the chat snap-in from the dropdown list.
6. Select **Show queue position** if you want to display the customer's place in line while they wait for a support agent. Make sure that the Live Agent chat button you selected has **Enable Queue** selected in your Live Agent chat button settings.
7. Click **Save**.

After you've provided the Live Agent settings, get the code to add the chat snap-in to your web pages.

IN THIS SECTION:

[Customize the Pre-Chat Form](#)

Gather contact information from your customers and find out about their needs using a pre-chat form. You can create a pre-chat form that addresses different business needs and associates customer information with Salesforce records like leads, cases, and contacts. You can also customize the fields used on the form.

[Customize the Offline Support Form](#)

Let customers submit a case form when your support agents are offline.

[Customize Additional Chat Branding](#)

Set the base font size, width and height, and images for your Snap-ins Chat deployment.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- **Customize Application**

Available Chat Features in Snap-Ins Chat

Most Live Agent features are supported with Snap-ins Chat. Enable the following features in your Live Agent configuration, deployment, and chat button to provide chat features for your support agents and chat visitors. Live Agent features can be enabled only in Salesforce Classic.

SEE ALSO:

[Available Chat Features in Snap-Ins Chat](#)

[Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages](#)

Customize the Pre-Chat Form

Gather contact information from your customers and find out about their needs using a pre-chat form. You can create a pre-chat form that addresses different business needs and associates customer information with Salesforce records like leads, cases, and contacts. You can also customize the fields used on the form.

Important: Before you start, make sure that the permission “Enable Support QuickAction Rest endpoint for Guest Users” is turned on for your org. If the permission isn’t enabled, your customers can’t request a chat.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

The screenshot shows a mobile-style pre-chat form. At the top, there's a dark header with a close button (X) and the text 'Live Chat'. Below the header is a dark background with a white Salesforce logo. The form fields are:

- * Full Name: Input field with 'John' entered.
- Last Name: Input field with 'Smith' entered.
- * Your Email: Input field with 'jsmith@example.com' entered.
- What Brings You Here Today?: Dropdown menu with 'Subscription Questions' selected.

 At the bottom, there's a blue button labeled 'Start Chatting' and a small text line above it that says 'We won't send you spam.'

When you design your pre-chat form, you can select a use case scenario that automatically associates information from the form with Salesforce records. When a customer enters their name or email address into the form, Salesforce matches the information with a Salesforce contact record or lead record. If no match is found, Salesforce creates a record.

For example, if you select the Service scenario, Salesforce relates the customer’s information with Case and Contact records.

Table 8: Use Cases for Associating Pre-Chat Information with Salesforce Records

If you select:	Then Salesforce associates the pre-chat information with these record types:
Sales	Lead records
Service	Contact records Case records
Basic	Contact records

You can select the fields that are shown on the pre-chat form, change the order of the fields, and make fields required. To make the form more user-friendly to customers, add up to four fields.

To set up the pre-chat form:

1. From Setup, enter *snap-ins* in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with by clicking the arrow beside the deployment name and selecting **View**.
3. Click **Edit** next to Live Agent Settings.
4. In the Pre-chat section, move the radio button to **Active**.
5. Click **Edit**.
6. Select the use case for the pre-chat form.
 - a. Select the main reason that customers use chat. The reason that you select affects the type of Salesforce record that's created from the information that customers enter into the pre-chat form.
 - b. Select the record type that's created from the pre-chat form. The drop-down menu shows record types that are available on the object.
 - c. Click **Next**.
7. Select the fields shown on the pre-chat form.
 - a. To change the order of the fields, use the up arrow and down arrow.
 -  **Note:** For the Service scenario, fields are grouped by object. Contact fields always appear above Case fields.
 - b. To add a field, click **+**. You can add only fields that are available on the object.
 - c. To remove a field, click **X**.
 - d. To require customers to fill out a field, select **Required** next to the field.
 - e. Click **Save**.
8. Optionally, select a custom Lightning Component to replace the standard component. To learn more about using custom components for Snap-ins pre-chat, see Custom Lightning Components in the *Snap-Ins for Web Developer Guide*.

Turn off your pre-chat form at any time by viewing your deployment in Setup and moving the pre-chat page slider to **Inactive**.

-  **Note:** You can use the pre-chat APIs to send nonstandard pre-chat details along with what's available in setup. For more information, see Enhance the Pre-Chat Page in the *Snap-Ins for Web Developer Guide*.

Customize the Offline Support Form

Let customers submit a case form when your support agents are offline.

 **Important:** Before you start, enable Web-to-Case and make sure that the permission “Enable Support QuickAction Rest endpoint for Guest Users” is turned on for your org. If the permission isn’t enabled, your customers can’t request a chat.

You can select the fields that are shown on the offline support case form, change the order of the fields, and make fields required. To make the form more user-friendly to customers, add up to 4 fields.

1. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with by clicking the arrow beside the deployment name and selecting **View**.
3. Click **Edit** next to Live Agent Settings.
4. In the Offline support section, move the radio button to **Active**.
 - a. If you see a warning about enabling guest access for your associated Salesforce site, click the link to enable it.
5. Click **Edit**.
6. Select a Case record type.
7. Select the fields shown on the form.
 - a. To change the order of the fields, use the up arrow and down arrow.
 - b. To add a field, click **+**. You can add only fields that are available on the object.

 **Note:** If you add a field with the `unique` attribute and a visitor enters a duplicate field value, the case submission confirmation is displayed even though the case isn’t created. Add unique fields to this form only if you’re certain that visitors are unlikely to enter duplicate values.
 - c. To remove a field, click **X**.
 - d. To require customers to fill out a field, select **Required** next to the field.
8. Optionally, enter a URL for the offline support header image. The image is displayed in the header of the snap-in when the customer opens the offline support form.
9. Click **Save**.
10. Refresh your code snippet and paste it into your website.

Turn off your offline support form at any time by viewing your deployment in Setup and moving the Offline support slider to **Inactive**.

 **Important:** Any time you turn offline support on or off, you must refresh the code snippet and repaste the code snippet into your website.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

Customize Additional Chat Branding

Set the base font size, width and height, and images for your Snap-ins Chat deployment.

1. From Setup, enter *snap-ins* in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with by clicking the arrow beside the deployment name and selecting **View**.
3. Click **Edit** next to Live Agent Settings.
4. In the Additional branding section, click **Edit**.
5. Set your pre-chat images.

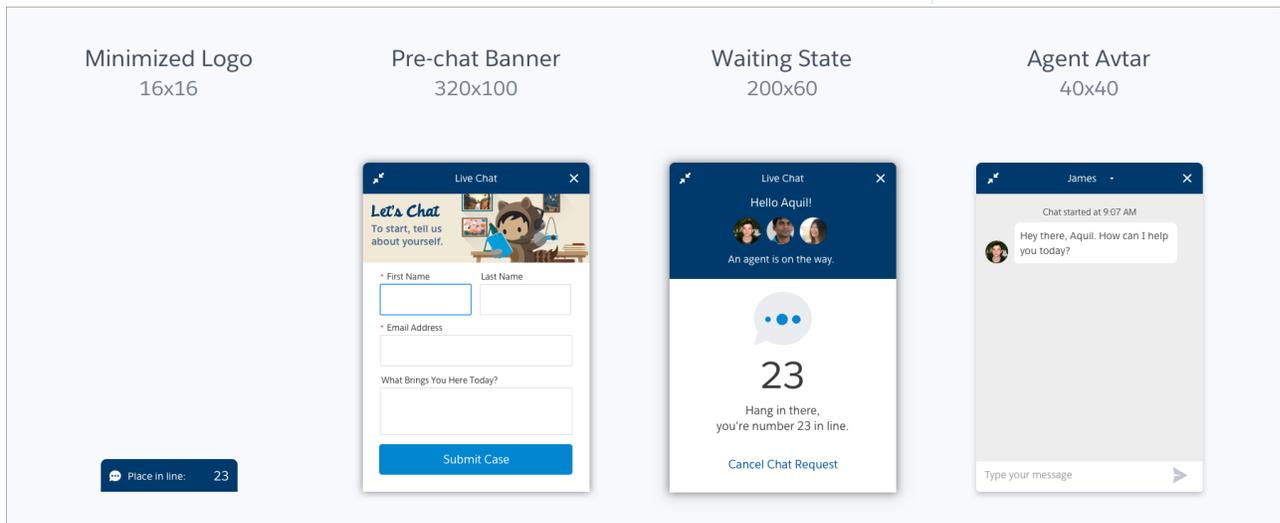
EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

- To set up Snap-ins Chat:
- Customize Application



6. Set the width and height of your snap-in. If you don't make any changes, the default sizes of 320 px and 498 px are used.
7. Set the base font size for your snap-in.
8. Click **Save**.

Available Chat Features in Snap-Ins Chat

Most Live Agent features are supported with Snap-ins Chat. Enable the following features in your Live Agent configuration, deployment, and chat button to provide chat features for your support agents and chat visitors. Live Agent features can be enabled only in Salesforce Classic.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

Table 9: Supported Live Agent Features for Snap-Ins Chat

Live Agent feature:	Enable it in:	Description
Save Transcript for Visitors	Always enabled	Lets the chat visitor save their chat transcript. They can save the transcript during or after the chat.
Sneak Peek	Live Agent Configuration	Lets agents see what the chat visitor is typing before sending a chat message.
Visitor Blocking	Live Agent Configuration	Lets agents block visitors from an active chat. When a visitor is blocked, any chat attempt from the IP address is denied.
Agent File Transfer	Live Agent Configuration	Lets agents request a file from the chat visitor.
Chat Transfer (to agent, skill, or chat button)	Live Agent Configuration	Lets agents transfer a chat directly to another agent, or to an agent assigned to a particular skill or chat button. When a chat is transferred to a button or skill, the transfer request is sent to all available agents assigned to that button or skill, and the chat is transferred to the first agent to accept the request.
Customer Time-Out	Chat Button	Lets you set a warning and timeout for when the chat visitor is idle during a chat.
Post-Chat Page URL	Chat Button	Lets you provide a link at the end of each chat to direct chat visitors to more resources or a survey. Adding a post-chat link creates a button
Automated Invitations	Chat Button	Lets you use a proactive chat invitation instead of a static button. Requires code snippet version 4.0 or later.
Sensitive Data Rules	Live Agent Sensitive Data Rules	Lets you omit or replace specified patterns like credit card or social security numbers.
Enable Queue	Chat Button	Lets you display the chat visitor's place in line while they wait for a support agent. Requires code snippet version 5.0 or later.

Customize the Branding and Appearance of Your Snap-In

Select the colors and font used in your snap-in to reflect your company's brand identity.

Before you start, talk with the team that maintains your website to get the color codes for your company's brand. You can specify branding colors by entering their hex code or RGB code, or by selecting a color in the color palette.

Important: We don't support adding custom CSS to your snap-in. We support using only the branding options in setup and in the customizable parameters in the code snippet. If you have custom CSS in your snap-in, it's your responsibility to test your snap-in each release to ensure that it functions properly.

The screenshots show how the branding elements appear in the snap-in.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

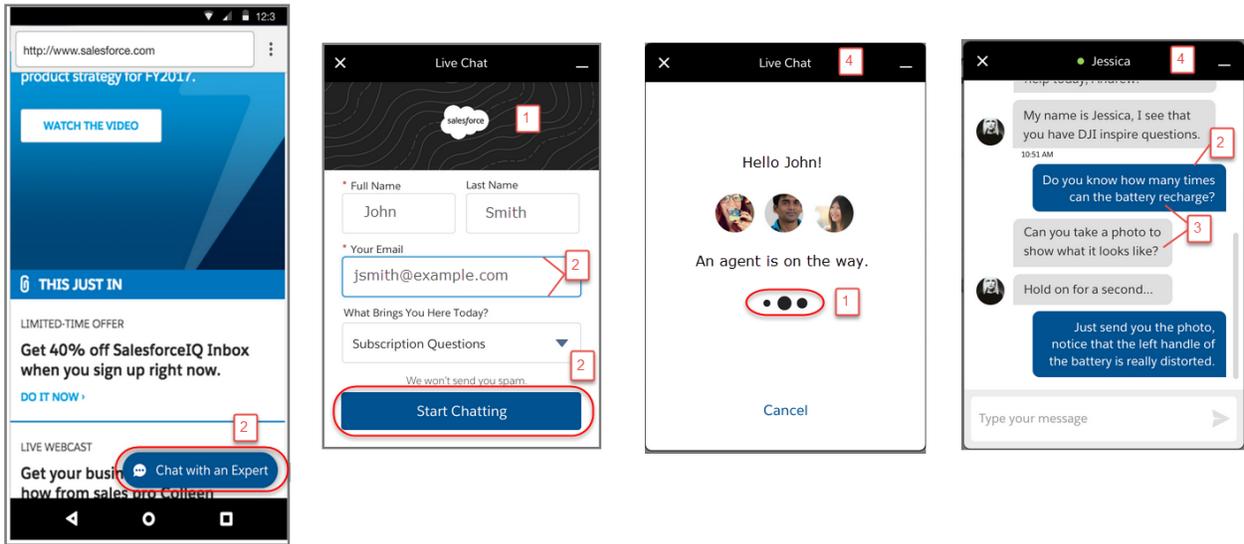


Table 10: Brand Elements That Can Be Customized in a Snap-In

Brand Element	Description
Brand Primary	<p>Sets the color of the:</p> <ul style="list-style-type: none"> • Pre-chat image backdrop • Pop message outlines • Loading balls • Loading balls when chat is minimized <p>By default, the color is set to hex #222222 (Night Black).</p> <p>In the screenshots, brand primary elements are indicated by [1].</p>

Brand Element	Description
Brand Secondary	<p>Sets the color of the:</p> <ul style="list-style-type: none"> • Call to Action buttons, such as “Start Chat” or “Chat with an Expert” • Input field focus • Send button • Guest message chat payload • Secondary buttons • Chat when it is minimized and there’s a new message <p>By default, the color is set to #005290 (Nimbostratus Blue).</p> <p>In the screenshots, brand secondary elements are indicated by [2].</p>
Contrast Primary	<p>Sets the color of the:</p> <ul style="list-style-type: none"> • Chat body text • Chat input text <p>By default, the color is set to #333333 (dark gray).</p> <p>The background color is white.</p> <p>In the screenshots, contrast primary elements are indicated by [3].</p>
Nav Bar	<p>Sets the color of the:</p> <ul style="list-style-type: none"> • Chat widget’s navigation bar • Chat button when the chat is minimized <p>By default, the color is set to hex #222222 (Night Black).</p> <p>In the screenshots, the nav bar element is indicated by [4].</p>
Font	<p>Sets the font used in the chat widget.</p> <p> Note: Some fonts aren’t supported on mobile browsers. If you select a font that isn’t available for a chat visitor’s mobile browser, the browser’s default font is displayed.</p> <p>The following fonts are supported in mobile browsers for both iOS and Android:</p> <ul style="list-style-type: none"> • Georgia • Times New Roman • Arial • Courier New <p>The following fonts are supported in mobile browsers for iOS only:</p> <ul style="list-style-type: none"> • Trebuchet MS • Verdana • Lucida Console

To customize the branding of the snap-in:

1. From Setup, enter *Snap-ins* in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with.
3. In the Snap-ins configuration page, go to the Branding section and click **Edit**.
4. Select the colors that you want to show in the snap-in.

Enter the color using the hex code. To enter an RGB code or to select a color from the palette, open the color palette by clicking the down arrow in the color field.

5. Select the font that you want to use in the snap-in.
6. Click **Finish**.

! **Important:** Changing the branding of an existing snap-in changes the code snippet for the snap-in. If you update the branding for an existing snap-in, you must update the code snippet on your webpages. If you customized the code snippet, you must add those customizations to the new code snippet.

SEE ALSO:

- [Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages](#)
- [Customize the Snap-Ins Code Snippet](#)
- [Customize Additional Chat Branding](#)

Customize Labels for Snap-Ins Chat

You can customize most of the field labels for your snap-ins from either Lightning Experience or Salesforce Classic.

1. From Setup, enter *Rename Tabs and Labels* in the Quick Find box, then select **Rename Tabs and Labels**.
2. Select the language for which you'd like to customize labels.
3. Click **Edit** next to Snap-ins.
4. If you want to change the tab name, enter the new name, then click **Save**.
5. Click **Next**.
6. Change the desired labels. The labels you change apply only to the selected language.
7. Click **Save**.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- Customize Application

Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages

Salesforce generates a unique code snippet based on the information you provided during the Snap-ins Chat setup. Copy and paste the chat code snippet so you can add the snap-in to your web pages. Copy and paste the optional meta tag code snippet to make your web pages responsive to different form factors such as mobile and desktop.

Ensure that you have access to the web pages where you want to add the snap-in. You might need to work with your company's webmaster.

When you add the chat code snippet to your web pages, customers can see and use the snap-in. If you're not ready for customers to access the chat yet, add the code snippets to a private web page.

You can customize the code to change certain aspects of the snap-in's appearance.

The `<meta>` tag code makes your web page responsive, so that the web page and the snap-in look good and perform well on different devices. For example, if a customer is looking at your web page and snap-in on a mobile phone, then the page and chat are resized to accommodate the smaller form factor.

This tag is the recommended `<meta>` tag for proper code snippet responsiveness. If your page is already responsive, then you might not need to add this snippet or change your `<meta>` tag. If you see issues with behavior on other devices, you can try updating your `<meta>` tag to code snippet that's provided. This tag is added to the head section of every page where the snap-in is used. If you don't include an appropriate `<meta>` tag, then the snap-in appears as it does on a desktop, regardless of the device used to access the page.

1. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with by clicking the arrow beside the deployment name and selecting **View**.
3. In the Snap-ins configuration page, go to the `Snap-in code snippets` section and click **Get Code**.
4. Copy the chat code snippet and paste it immediately above the closing `</body>` tag on your web page to add Snap-ins Chat to the page.
Paste the chat code snippet into every web page where you want the snap-in to appear. Don't place Snap-ins Chat on the same page or community as Live Agent chat buttons. Optionally, customize the chat code snippet.
5. Optionally, copy and paste the meta code snippet into the `<meta>` tag head section in every web page where you want the snap-in to appear.
6. Click **Done**.
The code snippets page closes.

SEE ALSO:

[Customize the Snap-Ins Code Snippet](#)

[Customizable Parameters in the Snap-Ins Chat Code](#)

[Test the Snap-Ins Chat Experience](#)

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

To set up Snap-ins Chat:

- [Customize Application](#)

Customize the Snap-Ins Code Snippet

Use a text or HTML editor to customize the optional parameters in the Snap-ins code snippet. You can customize certain [parameters](#) that affect the appearance and behavior of the snap-in.

1. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins**.
2. Select the snap-in deployment that you want to work with.
3. In the Snap-ins configuration page, go to the `Snap-in Code Snippets` section and click **Get Code**.
4. Copy the code snippet to a text editor or HTML editor.
5. In the text editor or HTML editor, specify the image URLs for the snap-ins parameters.
6. Save your changes.

After modifying the code snippet, [add the code](#) to every web page where you want the snap-in to appear.

IN THIS SECTION:

[Customizable Parameters in the Snap-Ins Chat Code](#)

You can customize certain parameters that affect the appearance and behavior of the chat snap-in so that the chat experience reflects your company's branding. Use these parameters to customize the pre-chat banner image, logo, waiting state image, and your agent's avatar picture. You also can customize the wording that appears on the chat button and on the snap-in when the chat is loading, when agents are online, when agents are offline.

SEE ALSO:

[Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages](#)

[Customizable Parameters in the Snap-Ins Chat Code](#)

Customizable Parameters in the Snap-Ins Chat Code

You can customize certain parameters that affect the appearance and behavior of the chat snap-in so that the chat experience reflects your company's branding. Use these parameters to customize the pre-chat banner image, logo, waiting state image, and your agent's avatar picture. You also can customize the wording that appears on the chat button and on the snap-in when the chat is loading, when agents are online, when agents are offline.

The following parameters are customizable.

- Set the chat window size and base font size:
 - `embedded_svc.settings.widgetWidth = "..."`
 - `embedded_svc.settings.widgetHeight = "..."`
 - `embedded_svc.settings.widgetFontSize = "..."`
- Set the domain for your snap-in to persist across subdomains: `embedded_svc.settings.storageDomain = "..."`
- Set the language: `embedded_svc.settings.language = "..."`
- Set the chat images:

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

USER PERMISSIONS

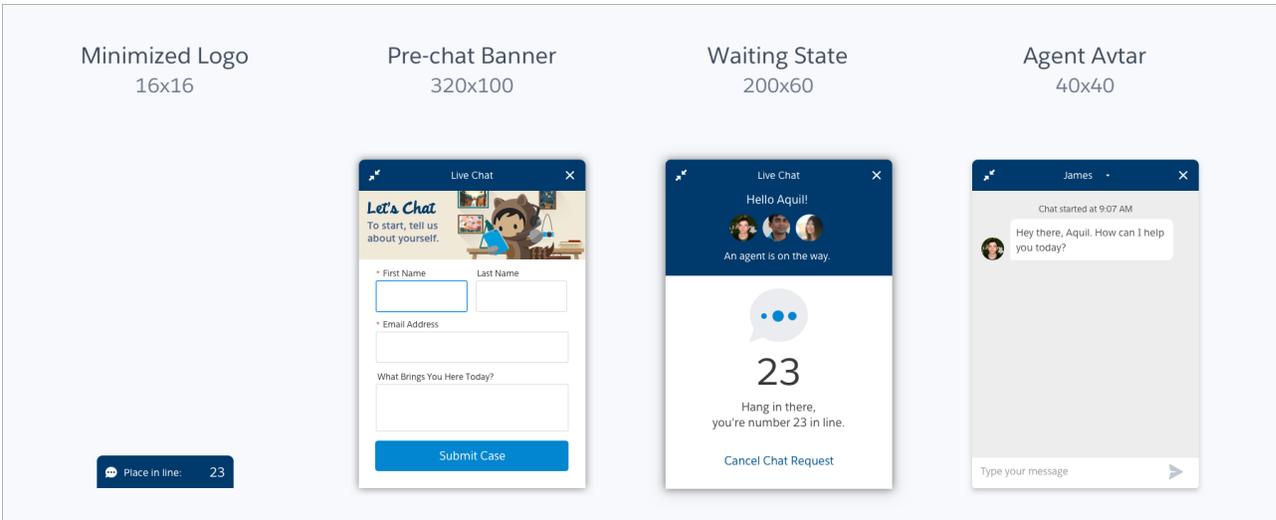
To set up Snap-ins Chat:

- [Customize Application](#)

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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



- `embedded_svc.settings.prechatBackgroundImgURL = "..."`
- `embedded_svc.settings.smallCompanyLogoImgURL = "..."`
- `embedded_svc.settings.waitingStateBackgroundImgURL = "..."`
- `embedded_svc.settings.avatarImgURL = "..."`
- `embedded_svc.settings.chatbotAvatarImgURL = "..."`
- Display the default chat button: `embedded_svc.settings.displayHelpButton = "..."`
- Customize the text on the snap-in:
 - `embedded_svc.settings.defaultMinimizedText = "..."`
 - `embedded_svc.settings.disabledMinimizedText = "..."`
 - `embedded_svc.settings.offlineSupportMinimizedText = "..."`
 - `embedded_svc.settings.onlineLoadingText = "..."`
- Set a routing order: `embedded_svc.settings.fallbackRouting = ["...", "..."]`
- Load files for custom chat events:
 - `embedded_svc.settings.externalScripts = ["...", "..."]`
 - `embedded_svc.settings.externalStyles = ["...", "..."]`

SEE ALSO:

[Copy the Snap-Ins Chat Code Snippets and Paste the Code into Your Web Pages](#)

[Customize the Snap-Ins Code Snippet](#)

[Snap-Ins for Web Developer Guide](#)

Test the Snap-Ins Chat Experience

Now that you've added Snap-ins Chat to your web pages, it's time to test it out.

To test the snap-in from the agent's perspective, log in to Salesforce as a Live Agent user with all the [Live Agent support agent permissions](#) on page 349.

1. Open the console and go online as the agent assigned to the appropriate button.
2. Test the chat from the customer's perspective. In another window in the same browser, initiate a chat by navigating to a web page where you've placed the code snippet and starting the chat.

The chat should be available.

3. On the customer side (that is, on your web page), verify that:
 - Pre-chat form looks how you expected
 - Chat window looks how you expected
4. On the agent side (that is, in the Salesforce Console for Service), verify that:
 - You receive a chat request when the chat is initiated

If the chat snap-in and experience appears as you expected, your customers can start using embedded chat to communicate with your agents.

SEE ALSO:

[Permissions for Live Agent Support Agents](#)

Localization and Translation for Snap-Ins Chat

The primary language for a chat snap-in is set differently when Translation Workbench is enabled or disabled.

If you're using Translation Workbench:

- The language set in the visitor's Accept-Language HTTP header for their browser is used when it matches a language in the list of active Translation Workbench languages. When the visitor has multiple languages set for their browser, the highest-ranked language that matches a language in the list of active Translation Workbench languages is used.
- When there's no match, the language specified for the Site Guest User of the Site associated with your Snap-ins deployment is used.

If Translation Workbench is disabled, the language specified for the Site Guest User of the Site associated with your Snap-ins deployment is used.

 **Important:** To use translation, you must allow cookies for your browser. For example, enable "Allow third-party cookies" in Safari iOS.

SEE ALSO:

[Support Users in Multiple Languages](#)

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

Snap-Ins Chat Limitations

Snap-ins Chat has the following limitations.

You can't use Snap-ins Chat on the same page or community as Live Agent chat buttons.

The Snap-ins chat window title shows the agent's name instead of the Live Agent Chat Window Title setting. When you enable this setting in the Live Agent Configuration, it doesn't work in the snap-in.

If you want to use an existing Live Agent chat button for your snap-in, make sure the Pre-Chat URL field is blank. When this field is populated, Snap-ins chat doesn't work. Use the pre-chat fields in Snap-ins Chat setup instead.

Other usage limitations for Snap-ins Chat:

- Visitors can't chat with an agent if they're using private browsing mode on iOS.
- You can't embed Snap-ins Chat into Lightning components. Use a Visualforce page, Community, or web property only.
- Field-level validation rules aren't supported with Snap-ins Chat.
- When you host your Snap-ins Chat deployment on a Visualforce page, you must access the page using HTTPS. If you use HTTP, the snap-in doesn't load.
- To use translation, you must allow cookies for your browser. For example, enable "Allow third-party cookies" in Safari iOS.
- The visitor's recently viewed pages aren't updated during a chat, so the agent can only see which pages the visitor views before the chat starts.
- In offline support case forms, the Case Reason picklist field shows all picklist options regardless of what's specified in the record type.

SEE ALSO:

[Snap-Ins Chat](#)

Einstein Bots Chat

Lighten the load on your support agents with automated chat bots that can address straightforward issues or questions from your customers.

SEE ALSO:

[Einstein Bots for Service Cloud](#)

Integrate with Service Feature Snap-ins for Websites and Mobile Apps

Embed customer service directly into your mobile apps and web pages, so you can reach customers right where they are.

IN THIS SECTION:

[Snap-Ins for Websites](#)

Connect Service Cloud features to your website with Snap-ins and give your customers a great customer service experience.

[Snap-Ins for Mobile Apps](#)

Let your customers contact you on the go. Add chat, Knowledge, and case capabilities to your mobile apps with Snap-ins.

EDITIONS

Snap-ins setup node is available in: Lightning Experience

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

Snap-Ins for Websites

Connect Service Cloud features to your website with Snap-ins and give your customers a great customer service experience.

SEE ALSO:

[Snap-Ins Chat](#)

[Set Up Self-Service Appointment Booking for Field Service Lightning \(Beta\)](#)

[Snap-Ins for Web Developer Guide](#)

Snap-Ins for Mobile Apps

Let your customers contact you on the go. Add chat, Knowledge, and case capabilities to your mobile apps with Snap-ins.

IN THIS SECTION:

[Set Up SOS Video Chat and Screen Sharing](#)

Want to connect with your customers in a whole new way? Add SOS to your native Android or iOS mobile app so that your customers can connect with agents via two-way video or screen sharing. SOS is part of Service Cloud Snap-ins for Mobile Apps.

SEE ALSO:

[Snap-Ins for iOS Developer Guide](#)

[Snap-Ins for Android Developer Guide](#)

Set Up SOS Video Chat and Screen Sharing

Want to connect with your customers in a whole new way? Add SOS to your native Android or iOS mobile app so that your customers can connect with agents via two-way video or screen sharing. SOS is part of Service Cloud Snap-ins for Mobile Apps.

Gone are the days when your customers had to connect with a nameless, faceless agent over the phone. With one click, your customers can video chat with agents who provide personalized, in-app guidance with screen sharing and annotations.

SOS is integrated into the Salesforce console for the Service Cloud. Your agents can access cases, account records, and customer information quickly and easily during their video calls. Agents can also draw on customers' screens during an SOS session, giving your customers in-app guidance to solve their problems. Your customers get a comprehensive, personal support experience, and your agents have the information they need in the console to solve customer issues.

Even better, SOS is fully integrated into Omni-Channel, the Service Cloud's routing engine. Use Omni-Channel to customize how work items—including SOS video calls—are routed to your agents. Route SOS calls to the most available, capable agents in real time. No third-party routing engine required!

For more information on integrating SOS into your mobile applications, see [Snap-ins Developer's Guide for iOS](#) and [Snap-ins Developer's Guide for Android](#).

Before you set up SOS, [enable Omni-Channel in your org](#).

EDITIONS

Available in: Salesforce
Classic

SOS is available for an
additional cost in:
**Enterprise, Performance,
Unlimited, and Developer
Editions**

IN THIS SECTION:

1. [Assign SOS Licenses to Agents](#)

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

2. [Enable the SOS License](#)

Use a permission set to enable the SOS license for your users.

3. [Create an SOS Presence Status](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

4. [Give Users Access to SOS Presence Statuses with Permission Sets](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

5. [Give Users Access to Your SOS Presence Statuses with Profiles](#)

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

6. [Create an SOS Routing Configurations](#)

Routing configurations determine how work items are routed to agents. They let you prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

7. [Create an SOS Queue](#)

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

8. [Update Your Salesforce Console Settings](#)

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

9. [Create an SOS Deployment](#)

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

Assign SOS Licenses to Agents

Each agent who uses SOS must have an SOS license and be part of a permission set that enables the SOS license.

1. From Setup, enter `users` in the `Quick Find` box, then select **Users**.
2. Select the user that you want to assign an SOS license to.
3. Click **Permission Set License Assignments**.
4. Click **Edit Assignments**.
5. Check the **Enabled** checkbox for **SOS User**.
6. Click **Save**.

EDITIONS

Available in: Salesforce
Classic

SOS is available for an additional cost in:
Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To set up SOS:

- [Customize Application](#)

Enable the SOS License

Use a permission set to enable the SOS license for your users.

You can add only [users who have been assigned the SOS license to the permission set](#).

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Select the SOS permission set.
If you don't have an SOS permission set, create one. For *User License*, select *None*.
3. Click **App Permissions**.
4. Click **Edit**.
5. Select **Enable SOS Licenses**.
6. Click **Save**.

SEE ALSO:

[Permission Sets](#)

Create an SOS Presence Status

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Create a presence status that lets your agents indicate that they're online and available to receive SOS calls.

A presence status can be associated with one or more channels of work items. Associate the SOS presence status with the SOS service channel. That way, your agents can receive SOS calls when they're signed in with the SOS presence status.

1. From Setup, enter *Presence* in the **Quick Find** box, select **Presence Statuses**, then click **New**.
2. Name your status.
Let's call our status "Available for SOS." A version of that name becomes the Developer Name automatically.
3. In the Status Options section, select **Online**.
4. In the Service Channels section, add SOS to the Selected Channel list.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- [Customize Application](#)

Give Users Access to SOS Presence Statuses with Permission Sets

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through profiles.

1. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click the name of the permission set that contains your SOS agents.
3. Click **Service Presence Statuses Access**.
4. Click **Edit**.
5. Select the SOS presence status that we created earlier, "Available for SOS."
6. Click **Save**.

Give Users Access to Your SOS Presence Statuses with Profiles

Presence statuses indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Give SOS agents access to the SOS presence status so they can start receiving SOS calls.

Alternatively, you can give users access to presence statuses through permission sets.

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
2. Click the name of the profile that contains your SOS agents.
Don't click **Edit** next to the profile name. If you do, you won't see the correct page section where you can enable statuses.
3. In the Enabled Service Presence Status Access section, click **Edit**.
4. Select your SOS presence status, "Available for SOS," to associate it with the profile.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up SOS:

- Customize Application

To modify permission sets:

- Manage Profiles and Permission Sets

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To set up SOS:

- Customize Application

To modify profiles:

- Manage Profiles and Permission Sets

Create an SOS Routing Configurations

Routing configurations determine how work items are routed to agents. They let you prioritize the relative importance and size of work items from your queues. That way, the most important work items are handled accordingly, and work is evenly distributed to your agents. Create an SOS routing configuration to determine how SOS calls are dispersed to your agents.

After you create this configuration, we'll create an SOS queue for your SOS calls. Then, we'll associate our routing configuration with our SOS queue so that your agents can receive calls after we get SOS set up.

1. From Setup, enter *Routing* in the *Quick Find* box, select **Routing Configurations**, then click **New**.
2. Name your routing configuration.
Let's call our routing configuration "SOS Routing Configuration." A version of that name becomes the Developer Name automatically.
3. Set your routing priority.
If SOS calls are the most important or the only work items your agents handle, set your routing priority to *1*. That priority ensures that SOS calls are routed to your agents before other types of work items.
4. Select your [routing model](#).
5. Set the value of the *Percentage of Capacity* field to *100*.
Agents can accept only one SOS call at a time, so SOS calls take 100% of an agent's capacity.
6. Click **Save**.

Create an SOS Queue

Queues are a classic element of Salesforce that help your teams manage leads, cases, service contracts, and custom objects. Omni-Channel supercharges queues to route work items to agents in real time. Create an SOS queue to funnel SOS calls to SOS agents. We'll associate the SOS queue with the SOS routing configuration we created earlier.

The work items in the SOS queue are assigned the priority that you specified in the SOS routing configuration that you created earlier.

For routing to work correctly, assign each of your agents to a queue from which they'll be receiving work items.

For more information about queues, see "Queues Overview" in the Salesforce Help.

1. From Setup, enter *Queues* in the *Quick Find* box, then select **Queues**.
2. Click **New**.
3. In the *Label* field, name your queue.
Let's call our queue "SOS Queue." A version of this name becomes the *Queue Name* automatically.
4. In the *Routing Configuration* field, look up and select the routing configuration that you created earlier, "SOS Routing Configuration."
5. In the *Supported Objects* section, add *SOS Session* to the list of selected objects.
6. In the *Queue Members* section, add each of the agents to whom you want to route SOS calls to the *Selected Users* field.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To set up SOS:

- [Customize Application](#)

7. Click **Save**.

Update Your Salesforce Console Settings

After you get SOS all set up for your organization, it's time to a few settings in your Salesforce console so that your agents can start receiving work.

You need to add the Omni-Channel and SOS widgets to your console, as well as whitelist the URL *salesforceliveagent.com*.

The SOS and Omni-Channel widgets appear in the footer of the Salesforce console. From the Omni-Channel widget, agents can change their presence status and triage their incoming work assignments, including SOS calls. When an agent accepts an SOS call, the call opens in the SOS widget, where agents can view the customer's screen.

You also need to whitelist the URL *salesforceliveagent.com* to make sure your calls aren't blocked by your company's firewalls. This ensures that all of your customers' SOS calls make it safely to your agents.

1. From Setup, enter *Apps* in the **Quick Find** box, then select **Apps**.
2. Click **Edit** next to the Salesforce console app that you want to add the Omni-Channel and SOS widgets to.
3. In the Choose Console Components section, add Omni-Channel and SOS to your list of selected items.
4. In the **Whitelist Domain** field, add *salesforceliveagent.com* to the list of whitelisted domains.
5. Click **Save**.

Create an SOS Deployment

Create an SOS deployment to integrate your SOS settings from Salesforce into your mobile application.

When you create an SOS deployment, your deployment is assigned a unique ID number. Your mobile developers use this deployment ID to integrate your SOS settings in Salesforce into SOS in your mobile application.

1. From Setup, enter *SOS Deployments* in the **Quick Find** box, then select **SOS Deployments**.
2. Click **New**.
3. Choose the settings for your deployment.
4. Click **Save**.
5. Copy the SOS Deployment ID from the detail page and send it to your mobile developers.
To integrate the SOS deployment with a mobile application, mobile developers use the *SOS iOS SDK*.

IN THIS SECTION:

[SOS Deployment Settings](#)

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To customize a console app:

- Customize Application

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create SOS deployments:

- Customize Application

SOS Deployment Settings

SOS deployment settings control how your Salesforce SOS settings integrate into your mobile application.

Apply settings when you create or edit an SOS deployment.

Setting	What It Does
SOS Deployment Name	Names the deployment. This deployment name, or a version of it, automatically becomes the API Name.
API Name	Sets the API name for the Live Agent deployment.
Activate Deployment	Activates the deployment so customers can request SOS calls when SOS is deployed in your mobile application.
Voice-Only Mode	Disables video functionality and allows agents and customers to communicate with audio only.
Enable Backward-Facing Camera	Allows the customer to relay video from the customer's backward-facing mobile camera to agents.
Queue	Determines the queue that you want to route incoming SOS calls to.
Session Recording Enabled	Automatically records SOS sessions.
Session Recording Storage Provider	Determines the data storage provider that stores your SOS session recordings. Available only if session recording is enabled.
Session Recording Storage Provider API Key	The ID of the access key that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider API Secret	The ID of the access secret that's associated with your Amazon S3 storage account. Available only if session recording is enabled.
Session Recording Storage Provider Bucket	The name of the Amazon S3 bucket where you want to store your SOS session recordings. Available only if session recording is enabled.

EDITIONS

Available in: Salesforce Classic

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

Connect to Customers Where They Are With Social Customer Service

Join customer conversations on social media, such as Twitter and Facebook. Create cases from social posts, and deliver service on customers' favorite channels.

IN THIS SECTION:

[Social Customer Service](#)

Turn social network posts into cases or leads with Social Customer Service. Agents can reply to social network posts from the Service Console, so your company can join customer conversations where they're happening.

[Set Up Social Customer Service with a Guided Setup Flow](#)

Add your Twitter and Facebook accounts to turn your tweets and posts into cases in Service Cloud. Connect your social accounts, turn on Social Studio, and give your team access to your social cases.

[Administer Social Customer Service](#)

Enable social customer service in your organization and customize your support agents' experience.

[Engage and Respond Using Social Customer Service](#)

Use social customer service to engage your customer on social media.

Social Customer Service

Turn social network posts into cases or leads with Social Customer Service. Agents can reply to social network posts from the Service Console, so your company can join customer conversations where they're happening.

Important: If you have two or less social accounts to track, use the free starter pack. Otherwise, you need the Social Service Pro add-on or Social Studio accounts.

Social Customer Service integrates with Social Studio so agents and sales reps can respond to cases and leads created from Facebook, Twitter, Instagram, and other social networks.

Note: Instagram is not available in the starter pack version. You must have a Social Studio account to sync your Instagram account.

Social Network	Release State
Facebook	Generally Available
Twitter	Generally Available
Instagram	Generally Available
Google+	Pilot Program
Sina Weibo	Pilot Program

The social publisher action on the case or lead feed is the primary interface for replying to consumers or prospects. Inbound and outbound social posts appear as items in the feed, making it easy to follow conversations. Permission sets let you grant access to your managed social accounts to different sets of users. Out of the box settings control how inbound social posts are processed, but you can modify an Apex class to apply your own custom business logic.

Note: When a lead is converted to an account or contact, the social items in the feed are removed.

In the Salesforce app, agents can see and reply to social content from mobile devices.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

To send and receive social media posts or messages:

- Case Feed enabled
- AND
- Access to a social account

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.

 **Note:** Social Customer Service supports sending and receiving 280-character tweets

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.

For both Facebook and Twitter, you can see attachments on social posts within case feeds and add image attachments to them too. You can also click **View Source** links to open the inbox of the native social media website. **View Source** links direct you to the inbox of the social media account you're logged in to, not the exact message or thread.

You can sync your Instagram #hashtag to Social Customer Service to receive Social posts when your brand's #hashtag is mentioned on Instagram. To activate Instagram #hashtag listening, [create a rule](#) in your Social Studio account to receive posts when your brand's #hashtag is mentioned.

Social Customer Service Limits

Social Customer Service Limits	Enterprise, Performance, and Unlimited editions.
Maximum number of active managed social accounts	2000 accounts. Social Customer Service Settings shows up to 500 managed social accounts per page.
Maximum number of post labels	200 post labels

SEE ALSO:

[Administer Social Customer Service](#)

[Social Action Tips](#)

[Complete Guide to Social Customer Service](#)

Set Up Social Customer Service with a Guided Setup Flow

Add your Twitter and Facebook accounts to turn your tweets and posts into cases in Service Cloud. Connect your social accounts, turn on Social Studio, and give your team access to your social cases.

The Twitter and Facebook setup flows are the fastest and easiest ways to get started with Social Customer Service and create cases from your tweets and Facebook posts. When you complete the flow, tweets to your company's Twitter handle and posts on your company's Facebook page become cases in Salesforce. Then, your support team can get to work!

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking  and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

What Does the Twitter Flow Do?

In this setup flow, we walk you through:

- Enabling Social Studio
- Authenticating your Twitter account
- Authorizing Salesforce to use your account
- Selecting the users who can access cases created from your Twitter account

We also create a permission set in the background during the setup flow. The permission set grants the selected users access to your Twitter cases.

What Does the Facebook Flow Do?

In this setup flow, we walk you through:

- Enabling Social Studio
- Authenticating your Facebook account
- Choosing the Facebook page(s) that you want to manage in Service Cloud
- Selecting the users who can access cases from your Facebook page(s)

We also create a permission set in the background during the setup flow. The permission set grants the selected users access to your Facebook cases.

SEE ALSO:

[Get Started with Service Setup](#)

Administer Social Customer Service

Enable social customer service in your organization and customize your support agents' experience.

Social Customer Service can be customized to your organization's needs. However, there are some considerations when adjusting the default setup.

- Automated users, such as, runas, loginxi, and connected app users, also need access to posts. Posts may be updated multiple times automatically under the automated users permissions.
- When creating custom validation rules, ensure all users involved have the necessary permissions. For example, if only case owners can update posts on their cases, make sure that case owners have permission to update posts.

 **Note:** All users, even users without the "View Setup and Configuration" user permission, can view external social accounts from their org via the API.

IN THIS SECTION:

[Enable Social Customer Service](#)

Enable Social Customer Service, install the Social Customer Service package, sync your social accounts, and assign social handles.

[How to Reconnect a Social Account](#)

Reconnect your social account for Social Customer Service.

[Tour the Social Conversations Component](#)

When you add the Social Conversations component, agents can quickly get a sense of who the customer is, context surrounding the case, and insight into previous interactions. The component pulls information from Twitter, Facebook, and Instagram.

[Configure the Social Conversations Component](#)

Use the Lightning App Builder to set up the Social Conversations component.

[Enable Social Post Approvals](#)

Social care agents are both problem solvers for your consumers and the voice of your brand on social networks like Facebook and Twitter. You can have guidelines so your agents write with a consistent tone and syntax that's in line with your organization's social media strategy. For example, you require social agents to sign their tweets in a standard manner, such as "~John."

[Enable Moderation for Social Customer Service](#)

Use moderation to triage incoming posts and only create cases for posts that are actionable requests for help. Moderation helps your organization focus on real customer issues and avoid opening unnecessary cases.

[Create the Social Action Interface](#)

The social action is created when you install Social Customer Service. You can add, remove, and organize fields to suit your organization.

[Format Case Content from Social Posts](#)

Use Social Business Rules to automate how inbound social content is processed and appears to support agents.

[Modify the Default Apex Class](#)

If you aren't using the Starter Pack, you can customize the default Apex class to specify how inbound social content is processed.

SEE ALSO:

[Enable Social Post Approvals](#)

[Complete Guide to Social Customer Service](#)

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

Enable Social Customer Service

Enable Social Customer Service, install the Social Customer Service package, sync your social accounts, and assign social handles.

 **Important:** If you have two or less social accounts to track, use the free starter pack. Otherwise, you need the Social Service Pro add-on or Social Studio accounts.

 **Note:** Facebook and Twitter accounts can be synced with the free starter pack. A Social Studio account is required to sync Instagram.

 **Important:** To create case feed items from social posts, you must enable Case Feed Tracking for All Related Objects. See [Set Up Cases for Salesforce Classic](#) on page 19. For Leads, from Setup, enter *Feed Tracking* in the *Quick Find* box, then select **Feed Tracking** and ensure *Enable Feed Tracking* and *All Related Objects* are checked.

When a lead is converted to an account or contact, the social items in the feed are removed.

1. From Setup, enter *Social Media* in the *Quick Find* box, then select **Social Customer Service**.
2. On the Settings tab, check *Enable Social Customer Service*.
3. If you want posts approved before they send, check *Enable approvals for social posts*.
4. If you want to map new posts to parent posts, which are the first posts that generated a case, select **Enable retrieval of parent posts for added context**.
5. Under *Social Studio Credentials*, either create a Social Studio account with the starter pack by clicking **Activate Social Customer Service Starter Pack**, or click **Login to Social Studio** and enter your Social Studio credentials.

 **Note:** With the Social Customer Service Starter Pack, you can enable Social Customer Service and up to two social accounts from any social network. For example, if you add one Twitter account, you can only add one Facebook account. You can't downgrade from a Social Studio account to the starter pack. The starter pack doesn't support the moderation feature (all posts become cases), and you can't customize the default Apex code.

6. On the Social Accounts tab, click **Add Account** and select a social network.

The social network opens and asks you to authenticate the account. Once your account is authenticated, Salesforce returns you to the Social Accounts tab.

 **Note:** If you receive the error *We're sorry, but we currently do not support Facebook business accounts registration, or Your Facebook account can't be added due to unsupported features*, you might need to set a user name on your Facebook page.

7. Click the refresh icon next to **Add Account**.

 **Warning:** If you delete a Social Account, it is deleted everywhere, including Social Studio, and you can't retrieve the deleted account.

8. If you are using the Starter Pack, check the *Case Creation* box to indicate that you want cases created automatically when posts come from the social account.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

For example, if you have two Twitter handles, one for support and one for marketing, you can have cases created automatically only from the support handle. The tweets from the marketing handle go in a social post queue for review. See [Manage Social Posts](#) on page 551.

 **Note:** If you are using the full Social Customer Service version, you can set up case moderation through Social Studio. See [Enable Moderation for Social Customer Service](#) on page 470.

9. If you have a portfolio of managed social accounts, set the `Default Responses From` for each Twitter, Instagram, and Sina Weibo account. This lets you standardize and raise awareness of your brand's support by setting a dedicated support handle, for example @acmehelp or @acmesupport. Also, agents have fewer clicks when they send outbound posts because the chosen account appears as the default value in the account drop-down in the social publisher. The default response handle doesn't apply for Twitter direct messages and doesn't affect Facebook, Google Plus, or LinkedIn, as they are restricted to the page handle itself.
10. On the `Inbound Settings` tab, you can see which Apex class controls how the inbound content is processed in your organization and which user it's set to run under. If you are using the default Apex class, you can select inbound business rules to determine how incoming social data is handled.

Enable Case Reopen

If a new post, from the same social persona, is associated to a closed case, the case is reopened within the designated number of days. The number must be greater than or equal to 1 and less than or equal to 3000.

Use Person Accounts

Assign a person account of the selected type for the social persona parent record.

Create Case for Post Labels

Override the social hub's case creation rules and create a case when selected post labels are present on a social post. Post Labels are used to answer the question "What is the topic of this one post?". Post labels, set in Social Hub, help to provide further context to what the individual post is about.

 **Note:** Social Customer Service only shows 200 post labels. If you have more post labels in Social Studio, you can view them in that program.

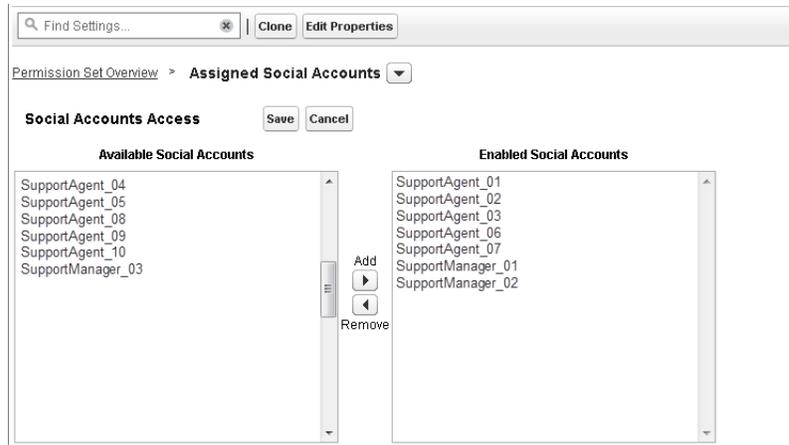
The default Apex class creates a social post, social persona, case, contact, and supports common use cases. For information on modifying the default Apex class, see [Modify the Default Apex Class](#).

 **Important:** If you are using the starter pack, you can't change the Apex class; however, you can change the user it's run under in **Run Apex As User**.

To support attachments on social posts, make sure the **Run Apex As User** has access to Files, Salesforce CRM Content, and ContentVersion in the API. To prevent agents from accidentally posting attachments from customers, make sure agents aren't the **Run Apex As User**. This prevents agents from seeing or selecting customers' attachments in the Select File box. To make attachment download links public, the **Run Apex As User** must have the Create Public Links permission. Without this permission, the links can't be accessed from external social networks.

For connected app users only: When a new user is set as **Run Apex As User**, they must be added to the Inbound Automation permission set. Enter *Social Customer Service* in the `Quick Find` box and add the user under `Inbound Settings`.

11. To assign social handles to a profile or permission set, while in Setup:
 - Enter *Profiles* in the `Quick Find` box, then select **Profiles**.
 - Enter *Permission Sets* in the `Quick Find` box, then select **Permission Sets**.
12. Click an existing profile or permission set or create a new one.
13. In the Apps section, click **Assigned Social Accounts**.
14. Click **Edit**.



15. Assign the social accounts you need to make available to your users with this profile or permission set.

Important: All users must have the profile or permission set you chose or created in step 8.

16. Save your changes.

17. Ensure that the profile or permission set has the correct field visibility.

- For profiles, from Setup, enter *Profiles* in the Quick Find box, select **Profiles**, then select the profile you chose or created earlier. Next, in the Field Level Security section, select **Social Post**.
- For permission sets, from Setup, enter *Permission Sets* in the Quick Find box, select **Permission Sets**, then select the permission set you chose or created earlier. Next, click **Object Settings**, and then select **Social Post**.

18. Click **Edit**. Under Field Permissions, ensure all fields available are set to Visible (not Read-Only) for profiles or Edit for permission sets. Click **Save**.

19. Optionally, set up quick text so agents can create ready-to-send responses to social networks. See [Enable Quick Text](#).

20. Optionally, give social post read access to external community and portal users.

There are 3 requirements to make social posts available in communities and portals.

- Ensure that the user has access to cases in the community.
- Give users read permission to social posts on their profiles.
- On your organization's Social Post object, enable visibility to individual fields through the field level security settings.

Note: Once these requirements are met, external users can see all social posts exposed to them. For example, if a case or lead feed is exposed externally, all social posts in the feed are visible. There is no way to limit visibility at the social post object level.

Turning on history tracking on for the Social Persona and Social Post objects is recommended for the first few months of using Social Customer Service. History tracking helps identify who made what changes when and for differentiating between automatic and manual changes.

You can synchronize up to 2,000 managed social accounts from Social Studio. However, the Social Customer Service Settings page in Setup only shows up to 500 managed social accounts. Agents can respond from all synced accounts from the social publisher on the case feed. If you are syncing more than 500 social accounts, allow at least a minute for the settings page to load.

SEE ALSO:

- [Field History Tracking](#)
- [How to Reconnect a Social Account](#)
- [Administer Social Customer Service](#)
- [Complete Guide to Social Customer Service](#)

How to Reconnect a Social Account

Reconnect your social account for Social Customer Service.

Your social account can be disconnected from Social Customer Service if your social media network provider's connect, or token, has expired. Many providers have expiration policies of 60 to 90 days. In addition, if your agents don't publish social posts for 60 days, your account may be disconnected and you must reconnect it.

 **Note:** Social Customer Service can experience authentication errors, especially if Network Access is enabled and you are using Social Customer Service with a [Connected App](#). To avoid authentication errors, add your Social Customer Service IP address to Network Access rules in Setup. The Social Customer Service IP address can be found on the Login History page, also in Setup.

1. From Setup, enter *Social Media* in the **Quick Find** box, then select **Settings**.
2. On the **Social Accounts** tab, click **Reauthorize** in the **Action** column.
The social network opens and asks you to authenticate the account. Once your account is reauthenticated, you are returned to the Social Accounts tab.

SEE ALSO:

- [Enable Social Customer Service](#)
- [Social Customer Service](#)
- [Complete Guide to Social Customer Service](#)

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

To send and receive social media posts or messages:

- Case Feed enabled
- AND

Access to a social account

Tour the Social Conversations Component

When you add the Social Conversations component, agents can quickly get a sense of who the customer is, context surrounding the case, and insight into previous interactions. The component pulls information from Twitter, Facebook, and Instagram.

Agents get information about the customer at a glance.

View the customer's social persona and verified status (1). The customer's name, social media handle and bio, followers, and influencer score are all part of the social persona.

 **Note:** The influencer score is only for Twitter. It's a global measure of influence on a scale of 0–100. The calculated score leans heavily toward reach and frequency. Other measures and ratios are considered to decrease blatant manipulation.

If the customer has a verified status, a verified badge is displayed. Verified status means that Facebook, Twitter, or Instagram has confirmed the brand, business, or public figure's identity.

Author labels (2) provide context for community management teams to understand who they're dealing with. An agent can add author labels to the social persona to add context and automation capabilities. If your marketing team uses Salesforce Social Studio, the Social Studio author labels are shown here.

Is your customer feeling positive, negative, or neutral about your company? Check the customer's sentiment temperature (3). The sentiment temperature is based on whether the majority of the social posts in Salesforce are positive or negative. Total posts (3) is the sum of all social posts for this social persona in Salesforce, not from social media in general.

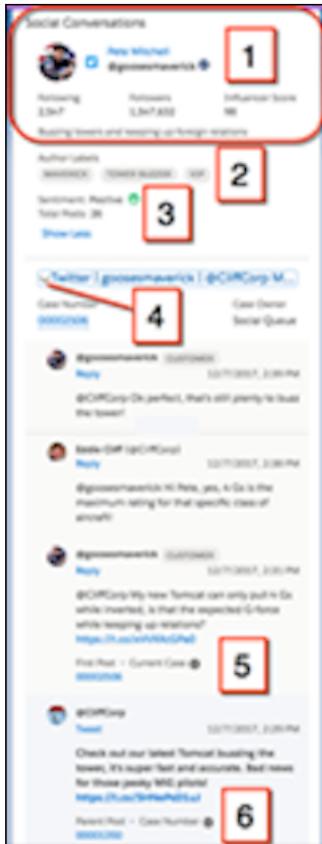
To expand or collapse a case, click the dropdown (4). The social post that created the case is marked as the first post (5). The parent post (6) is the social post that the customer replied to, which generated the case. The case number (6) references the social post related to the case.

When Social Customer Service is set up, use the Lightning App builder to enable and customize the Social Conversations component.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.



Configure the Social Conversations Component

Use the Lightning App Builder to set up the Social Conversations component.

Social Customer Service must be set up.

1. From the agent console, click  and select **Edit Page**, which takes you to the Lightning App Builder.
2. Enter *Social Conversations* in the Quick Find box, and navigate to the component.
3. Drag the Social Conversations component to the right side of the Lightning App Builder. A three-column layout is recommended, with the Social Conversations component on the right.
4. Make sure that agents who use the Social Conversations component have Read Access permission on all fields on the Social Persona object. To set field permissions on permission sets and profiles, see Set Field Permissions in Permission Sets and Profiles in *Salesforce Help*.

Set Field Level Security

To ensure that agents have the correct field-level security, set the Social Persona and Social Post objects. All conversations component users need this post visibility.

1. From Service Setup, enter *Channels* in the Quick Find box, then select **Social Customer Service**. Under Settings, select the options that meet your needs.
2. To ensure that posts are approved before they are sent, select **Enable approvals for social posts**.
3. To map new posts to the parent post, which is the post that generated the case, select **Enable retrieval of parent posts for added context**.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

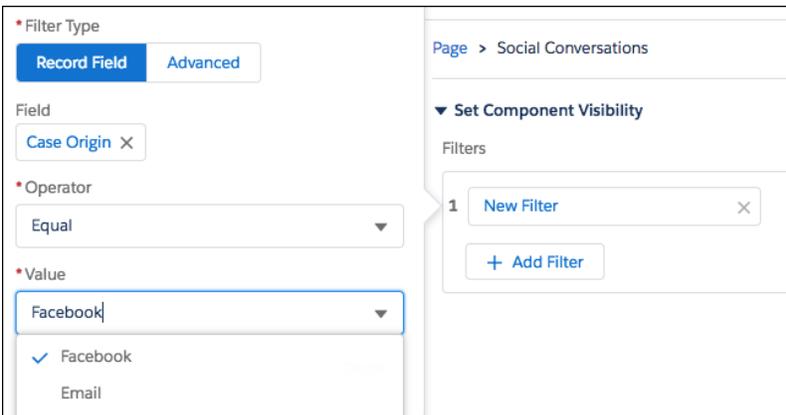
Social Customer Service is available in all editions with the Service Cloud.

Set Component Visibility Filters

To ensure that Facebook, Twitter, and Instagram posts are properly displayed in the conversations component, setting component visibility filters is recommended.

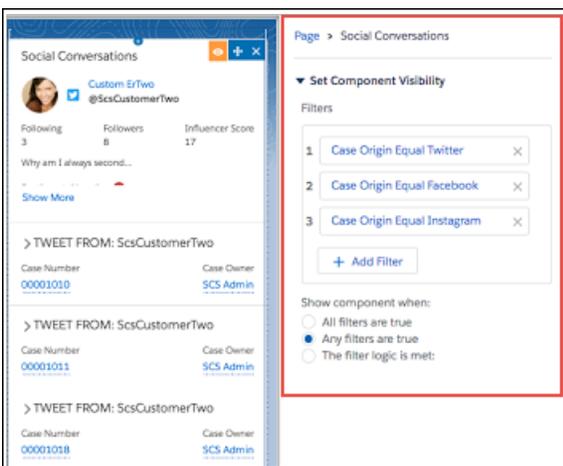
 **Note:** To display parent posts in the component, enable the org setting **Enable retrieval of parent posts for added context**. Parent posts don't display when this option isn't selected.

1. From the agent console, return to the Lightning App Builder.
2. Under Set Component Visibility, click **Add filter**, then set the Field to **Case Origin**.
3. Set the Operator to **Equal** and select one of the social media channels as the Value.



4. Create 3 filters, one for Facebook, Twitter, and Instagram.

 **Note:** Set the filter logic to **Show component when: Any filters are true**.



SEE ALSO:

[Set Field Permissions in Permission Sets and Profiles](#)

Enable Social Post Approvals

Social care agents are both problem solvers for your consumers and the voice of your brand on social networks like Facebook and Twitter. You can have guidelines so your agents write with a consistent tone and syntax that's in line with your organization's social media strategy. For example, you require social agents to sign their tweets in a standard manner, such as "~John."

Salesforce Admins can create approval processes and assign agents and approvers permissions accordingly.

1. From Setup, enter *Social Media* in the Quick Find box, then select **Settings**.
2. Select **Enable approvals for social posts**.
3. Build and activate approval processes for social posts using either the [Jump Start Wizard](#) or the [Standard Setup Wizard](#).

 **Important:** The Jump Start Wizard is a streamlined way to create approval processes in Salesforce. However, the **Let the submitter choose the approver manually** option is not supported in the Jump Start Wizard. Choosing that option results in an error later when an agent submits a post for approval.

4. From Setup, go to **Administer > Manage Users > Permission sets**.
5. Enable the new **Require Social Post Approvals** user permission.
6. Assign the **Require Social Post Approvals** user permission with a [permission set](#) to agents that need their posts reviewed before they are sent.

When assigning user permissions, remember these two points.

- Because approving a post automatically submits it for publishing, approvers must have the same access to social accounts as the agents whose work they're reviewing. Otherwise, the posts they approve result in an error.
- If your user permissions include **Require Social Post Approvals**, then the submit button on the social publisher always reads **Submit for Approval** rather than "Comment," "Tweet," or other words. This is true even if no active approval process applies to the user. In that situation, clicking **Submit for Approval** publishes the social post normally since there is no active approval process in effect.

For more information, see [Create an Approval Process with the Standard Wizard](#), [Prepare to Create an Approval Process](#), and [Sample Approval Processes](#).

 **Tip:** If your agents work with social post record detail pages, rather than in the case feed, we recommend removing the approvals related list from the page layout. The same page layout is shared between inbound and outbound social posts. Removing the approvals related list avoids confusion when viewing an inbound post that is an invalid candidate for an approval process. Approvers can still approve or reject posts through all other normal means such as email, Chatter, and list views.

SEE ALSO:

[Field History Tracking](#)

[Administer Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- **Manage Users**
- AND
- Customize Application**

To create case feed items:

- **Feed Tracking for All Related Objects on the Case object**

Enable Moderation for Social Customer Service

Use moderation to triage incoming posts and only create cases for posts that are actionable requests for help. Moderation helps your organization focus on real customer issues and avoid opening unnecessary cases.

Not all posts require a case, for example, a complimentary tweet or post does not need agent assistance. However, when the default social customer service is configured, cases are automatically created from each social post. Using moderation, agents can manage which posts get cases and which are ignored. Moderation is enabled with a Social Hub rule in your Social Studio account to turn off automatic case creation.

 **Note:** With the Starter Pack, you can decide if you want cases created automatically when posts come from a particular social account on the Social Accounts tab. See [Enable Social Customer Service](#) on page 462.

1. From your Social Hub account, click the **Rules** tab.
2. Create a rule, or use an existing one, to indicate that no case is created in Salesforce.
For example, the rule should have the following setup.
 - a. Action: send to Salesforce.
 - b. **Create Case** checkbox unchecked.
3. Save and enable your rule.

 **Note:** You can enable your rule for all social posts or only those coming from certain managed accounts.

Case creation can also be customized by implementing a custom Apex case logic. To do so, from setup, enter *Social Media* in the **Quick Find** box, then select **Settings**. See [Modify the Default Apex Class](#).

 **Note:** If you started using Social Customer Service before Spring '16 and have a custom Apex class, you may need update your Apex class to benefit from the latest moderation features. If your custom Apex is extended from the default Apex class, you get the update for the default apex functions you call. If your custom Apex isn't extended from the default Apex class (you copied the default and changed it), you must update manually.

To manually update your custom Apex class, add the following code and update your moderation social post list view.

1. Call this method directly before inserting the post, after all the relationships have been set on the post.

```
private void setModeration(SocialPost post) {
    //if we don't automatically create a case, we should flag the post as requiring
    moderator review.
    if(post.parentId == null)
        post.reviewedStatus = 'Needed';
}
```

In the default Apex, see lines 50 and 61-65.

2. Update your moderation social post list filter from:

```
Parent EQUAL TO "" AND ReviewStatus NOT EQUAL TO "ignore"
```

To:

```
Parent EQUAL TO "" AND ReviewStatus EQUAL TO "Needed"
```

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To ensure that you don't lose track of social posts currently in your moderation queue, make a list view with the new filter, and switch to it once the new and old filters show the same results.

SEE ALSO:

[Field History Tracking](#)

[Administer Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

Create the Social Action Interface

The social action is created when you install Social Customer Service. You can add, remove, and organize fields to suit your organization.

The social action is created when Social Customer Service is enabled.

1. From the object management settings for cases, go to Button, Links, and Actions.
2. Click **Layout** next to the social action.
3. Edit the desired fields.



Note: Changing field values could invalidate incoming posts against the Social Customer Service [Apex class](#).

To send social content, the social action must have the following fields:

- In Reply To
- Managed Social Account
- Message Type
- Content



Important: The In Reply To field can't be read only.

Headline and Name are required fields. To remove them, create a predefined value for each field and remove them from the action. See [Set Predefined Field Values for Quick Action Fields](#).

4. Click **Save**.
5. From the object management settings for cases, go to Page Layouts.
6. In Case Page Layouts, click **Edit** next to Feed-Based Layout.
7. In the palette, click **Quick Actions**.
8. Ensure that the social action is in the Quick Actions in the Salesforce Classic Publisher section of the layout.
9. Optionally, repeat steps 5 through 8 for the Leads object to enable the social action on leads (from the object management settings for leads, go to Page Layouts).

SEE ALSO:

[Field History Tracking](#)

[Administer Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

Format Case Content from Social Posts

Use Social Business Rules to automate how inbound social content is processed and appears to support agents.

Once you enable Social Customer Service in Lightning Experience, you can choose how some inbound social content is processed into cases without updating your org's default Apex class.

1. From Setup, enter *Social Business Rules* in the Quick Find box, then select **Social Business Rules**.

If Social Customer Service isn't enabled, click **Turn On Social Customer Service** and complete the steps in [Enable Social Customer Service](#).

2. Under Case Subject, choose how inbound social content is formatted for cases' **Case Subject**.

If you build your own format, select options from the dropdown lists, and click the Add or

Remove icons ( ) for your preferred order and combination. While you build your format, it automatically appears as the **Example** under **Build Your Own Format**.

3. Click **Save**.

Keep the following in mind:

- By default, the social post source is captured in **Case Subject** as defined by the Apex handler class in your org.
- For social posts with reviews, review ratings appear in front of the social post source. For example, `4-Star • Tweet From Customer123`.
- While building your own format:
 - You can add up to 255 characters for **Custom Text** and up to 100 **Select an Option** fields.
 - If you select Content, review ratings appear in front of the content. For example, `4-Star • I need help with my router`.
 - Review ratings always appear in front of Content and are separated with a dot, which you can't change. For example, if you build `Social Network | Message Type | Content | Sentiment`, **Case Subject** appears as `Twitter | Tweet | 4-Star • Tweet From Customer123 | Neutral`.

SEE ALSO:

[Administer Social Customer Service](#)

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To administer Social Customer Service:

- Manage Users
- AND
- Customize Application

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

Modify the Default Apex Class

If you aren't using the Starter Pack, you can customize the default Apex class to specify how inbound social content is processed.

 **Note:** You can't modify the default Apex class if you are using the Starter Pack. The free Starter Pack lets you simply connect up to two social accounts and Salesforce handles the rest of the details, like a Social Studio account.

The [default Apex class](#) for Social Customer Service creates a social post, social persona, case, contact, and supports common use cases. To customize how information is processed, by create a new Apex class.

 **Important:** If your agents use the Social Customer Service feature to send private messages to Facebook users, prevent or resolve errors by upgrading your Apex classes to the latest available version of the Salesforce API. In particular, the Apex class that inserts the post must be version 32 or higher.

If you alter the default Apex class, be sure to select your new Apex class on the setup page, where you can also see Apex processing errors. From Setup, enter *Social Media* in the **Quick Find** box, then select **Settings**. An email is sent to the administrator when there are errors and, in most circumstances, the data is saved and can be reprocessed. If too many errors are waiting for reprocessing, the Salesforce Social Hub rules are automatically paused to ensure social content is not missed.

We have provided [tests for the default Apex class](#). If you alter your Apex class, you must alter the tests accordingly.

 **Note:** Social personas created after the Summer '15 release have a field indicating which social network created the persona: `Source App`. This field is set on creation and is not updateable. If your organization uses custom Apex, update it to use this field. Keep in mind that personas created before the Summer 15 release do not have the field. Also, every time new fields are added to the social action you must update your Apex version or the new fields aren't saved.

To create an Apex class, in Setup, enter *Apex Classes* in the **Quick Find** box, then select **Apex Classes**. You can use the following code to:

- Support person accounts
- Designate a default account ID
- Change the number of days before closed cases are reopened

```
global class MyInboundSocialPostHandlerImpl extends
Social.InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler {
    global override SObject createPersonaParent(SocialPersona persona) {
        String name = persona.Name;
        if (persona.RealName != null && String.isNotBlank(persona.RealName))
            name = persona.RealName;

        String firstName = '';
        String lastName = 'unknown';
        if (name != null && String.isNotBlank(name)) {
            firstName = name.substringBeforeLast(' ');
            lastName = name.substringAfterLast(' ');
            if (lastName == null || String.isBlank(lastName))
                lastName = firstName;
        }

        //You must have a default Person Account record type
        Account acct = new Account (LastName = lastName, FirstName = firstName);
        insert acct;
    }
}
```

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

```

        return acct;
    }

    global override String getDefaultAccountId() {
        return '<account ID>';
    }

    global override Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }
}

```

You can use the following code to implement your own social customer service process.

```

global class MyInboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler {
    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
        SocialPersona persona, Map<String, Object> data) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();

        // Custom process

        return result;
    }
}

```

The [default Apex class](#) sets the contact as the persona parent. To set the persona parent as an account, person account, or lead, create a method to override the persona parent.

If you want a post to go to the error queue, so errors are not lost, your custom apex must do one of two things.

1. Bubble up an exception (recommended).

```

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);

    try{
        //handle the post here
    } catch(Exception e){
        //log exception, etc
        throw e;
    }
    return result;
}

```

OR

2. Set the success flag on the response object to false.

```

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
    SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);

    try{
        //handle the post here
    }
}

```

```
} catch(Exception e){  
  //log exception, etc  
  result.setSuccess(false);  
}  
return result;  
}
```

IN THIS SECTION:

[Default Apex Class Process](#)

A visual diagram of an inbound post's path through the default apex class.

[Default Apex Class Reference](#)

Social Customer Service's full default Apex class code. The following Apex class is current as of the Summer '18 release.

[Apex Tests for the Default Apex Class](#)

Social Customer Service's tests for the default Apex class code.

[Data Populated into Social Objects](#)

Details on which fields exist in the standard objects, Social Post and Social Persona, and which fields are currently populated by data from Social Studio.

[Default Apex Class History](#)

Social Customer Service's full default Apex class for prior releases.

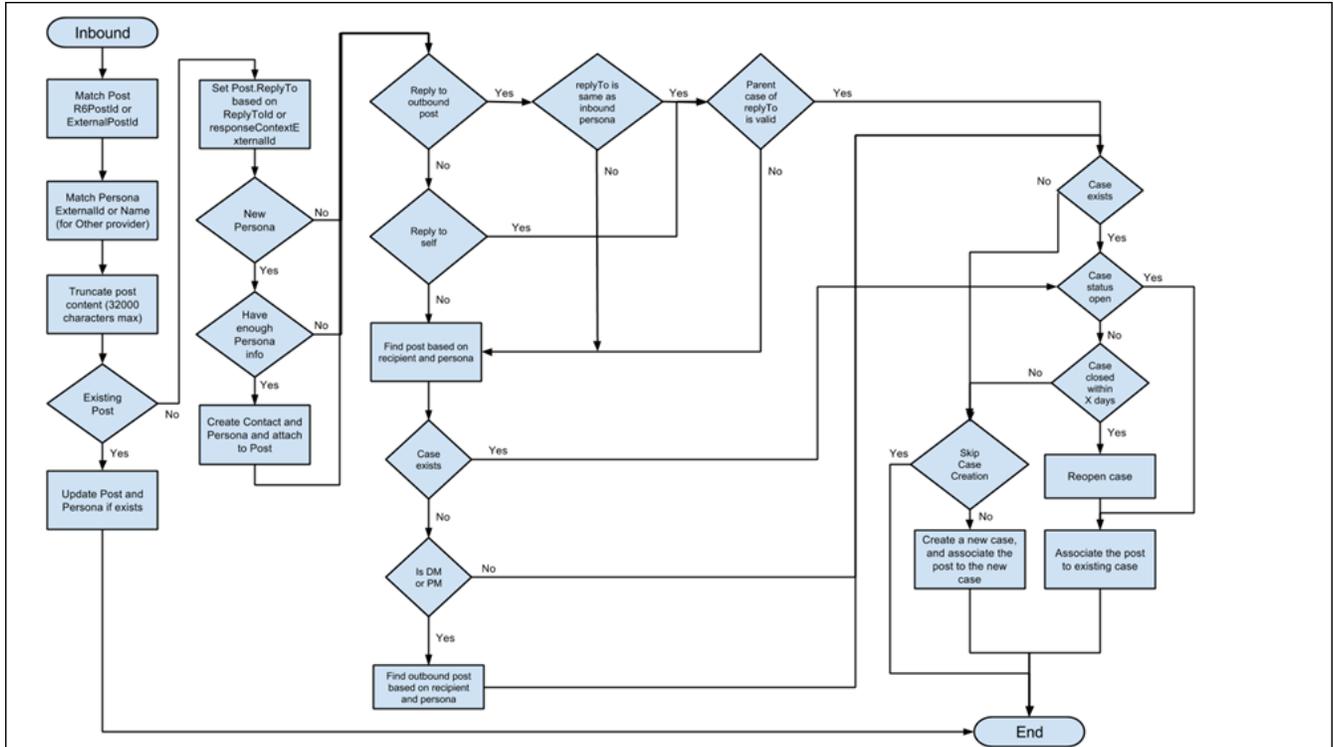
Default Apex Class Process

A visual diagram of an inbound post's path through the default apex class.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.



Default Apex Class Reference

Social Customer Service’s full default Apex class code. The following Apex class is current as of the Summer '18 release.

For previous versions, see [Default Apex Class History](#) on page 497

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = SocialPost.Content.getDescribe().getLength();

    final static Integer SUBJECT_MAX_LENGTH = Case.Subject.getDescribe().getLength();
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }
}
    
```

```
// Create a case if one of these post labels are on the SocialPost, regardless of the
skipCreateCase indicator.
global virtual Set<String> getPostLabelsThatCreateCase() {
    return new Set<String>();
}

// If true, use the active case assignment rule if one is found
global virtual Boolean getUsingCaseAssignmentRule() {
    return false;
}

global virtual String getDefaultAccountId() {
    return null;
}

global virtual String getCaseSubject(SocialPost post) {
    String caseSubject = post.Name;
    if (hasReview(post)) {
        String ratingsStr = getRatingString(post);
        caseSubject = ratingsStr + ' • ' + caseSubject;
    }

    return caseSubject;
}

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);
    matchPost(post);
    matchPersona(persona);

    if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
        post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
    }

    if (post.Id != null) {
        handleExistingPost(post, persona);
        return result;
    }

    setReplyTo(post, persona);
    buildPersona(persona);
    Case parentCase = buildParentCase(post, persona, rawData);
    setRelationshipsOnPost(post, persona, parentCase);
    setModeration(post, rawData);

    upsert post;

    if (isNewCaseCreated) {
        updateCaseSource(post, parentCase);
    }
}
```

```

handlePostAttachments(post, rawData);

    return result;
}

private void setModeration(SocialPost post, Map<String, Object> rawData){
    //if we don't automatically create a case, we should flag the post as requiring
moderator review.
    if(post.parentId == null && !isUnsentParent(rawData))
        post.reviewedStatus = 'Needed';
}

private void updateCaseSource(SocialPost post, Case parentCase){
    if(parentCase != null) {
        parentCase.SourceId = post.Id;
        //update as a new subject to prevent undoing any changes done by insert triggers

        update new Case(Id = parentCase.Id, SourceId = parentCase.SourceId);
    }
}

private void handleExistingPost(SocialPost post, SocialPersona persona) {
    List<SocialPost> existingPosts = [Select Recipient, IsOutbound from SocialPost where
id = :post.Id limit 1];

    // for any existing outbound post, we don't overwrite its recipient field
    if (!existingPosts.isEmpty() && existingPosts[0].IsOutBound == true &&
String.isNotBlank(existingPosts[0].Recipient)) {
        post.Recipient = existingPosts[0].Recipient;
    }

    update post;
    if (persona.id != null)
        updatePersona(persona);
}

private void setReplyTo(SocialPost post, SocialPersona persona) {
    SocialPost replyTo = findReplyTo(post, persona);
    if(replyTo.id != null) {
        post.replyToId = replyTo.id;
        post.replyTo = replyTo;
    }
}

private SocialPersona buildPersona(SocialPersona persona) {
    if (persona.Id == null)
        createPersona(persona);
    else
        updatePersona(persona);

    return persona;
}

```

```

private void updatePersona(SocialPersona persona) {
    try{
        update persona;
    }catch(Exception e) {
        System.debug('Error updating social persona: ' + e.getMessage());
    }
}

private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
    if(!isUnsentParent(rawData)) {
        Case parentCase = findParentCase(post, persona);
        if (parentCase != null) {
            if (!parentCase.IsClosed) {
                return parentCase;
            }
            else if (caseShouldBeReopened(parentCase)) {
                reopenCase(parentCase);
                return parentCase;
            }
        }
        if(shouldCreateCase(post, rawData)){
            isNewCaseCreated = true;
            return createCase(post, persona);
        }
    }

    return null;
}

private boolean caseShouldBeReopened(Case c){
    return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
}

private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
    if (persona.Id != null) {
        postToUpdate.PersonaId = persona.Id;

        if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
            postToUpdate.WhoId = persona.ParentId;
        }
    }
    if(parentCase != null) {
        postToUpdate.ParentId = parentCase.Id;
    }
}

private Boolean hasReview(SocialPost post) {
    return post.ReviewScore != null;
}

private String getRatingString(SocialPost post) {

```

```

Integer maxNumberOfStars = 5;
Double reviewScore = post.ReviewScore;
Double reviewScale = post.ReviewScale;
if (reviewScore == null) {
    reviewScore = 0;
}
if (reviewScale == null) {
    reviewScale = maxNumberOfStars;
}
Integer numberOfStars = Math.floor((reviewScore / reviewScale) *
maxNumberOfStars).intValue();
return numberOfStars.format() + '-Star';
}

private Case createCase(SocialPost post, SocialPersona persona) {
    String caseSubject = getCaseSubject(post).abbreviate(SUBJECT_MAX_LENGTH);

    Case newCase = new Case(subject = caseSubject);
    if (persona != null && persona.ParentId != null) {
        if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
            newCase.ContactId = persona.ParentId;
        } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
            newCase.AccountId = persona.ParentId;
        }
    }
    if (post != null && post.Provider != null) {
        newCase.Origin = post.Provider;
    }

    if (getUsingCaseAssignmentRule()){
        //Find the active assignment rules on case
        AssignmentRule[] rules = [select id from AssignmentRule where SubjectType =
'Case' and Active = true limit 1];

        if (rules.size() > 0){
            //Creating the DMLOptions for "Assign using active assignment rules"
checkbox
            Database.DMLOptions dmlOpts = new Database.DMLOptions();
            dmlOpts.assignmentRuleHeader.assignmentRuleId= rules[0].id;

            //Setting the DMLOption on Case instance
            newCase.setOptions(dmlOpts);
        }
    }

    insert newCase;
    return newCase;
}

private Case findParentCase(SocialPost post, SocialPersona persona) {
    Case parentCase = null;
    if (!isChat(post) && (isReplyingToOutboundPost(post) &&
isSocialPostRecipientSameAsPersona(post.ReplyTo, persona)) ||
(!isReplyingToOutboundPost(post) && isReplyingToSelf(post, persona))) {

```

```

        parentCase = findParentCaseFromPostReply(post);
        if (isParentCaseValid(parentCase)) {
            return parentCase;
        }
    }

parentCase = findParentCaseFromPersonaAndRecipient(post, persona);
if (parentCase == null && isChat(post)) {
    parentCase = findParentCaseOfChatFromPersonaAndRecipient(post, persona);
}
return parentCase;
}

private boolean isChat(SocialPost post) {
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private boolean isParentCaseValid(Case parentCase) {
    return parentCase != null && (!parentCase.IsClosed ||
caseShouldBeReopened(parentCase));
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

// reply to outbound post
private boolean isReplyingToOutboundPost(SocialPost post) {
    return (post != null && post.ReplyTo != null && post.ReplyTo.IsOutbound);
}

// replyTo.recipient == inboundSocialPost.persona.externalId
private boolean isSocialPostRecipientSameAsPersona(SocialPost postWithRecipient,
SocialPersona persona) {
    return (postWithRecipient != null && postWithRecipient.Recipient ==
persona.ExternalId);
}

// is replying to self
private boolean isReplyingToSelf(SocialPost post, SocialPersona persona) {
    return (post != null &&
        persona != null &&
        String.isNotBlank(persona.Id) &&
        post.ReplyTo != null &&
        String.isNotBlank(post.ReplyTo.PersonaId) &&
        post.ReplyTo.PersonaId == persona.id);
}

```

```

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersona =
findLatestInboundPostBasedOnPersona(post, persona);
    if (latestInboundPostWithSamePersona != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersona.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersonaAndRecipient(SocialPost post, SocialPersona
persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseOfChatFromPersonaAndRecipient(SocialPost post, SocialPersona
persona) {
    SocialPost latestReplyToPost =
findLatestOutboundReplyToPostBasedOnPersonaAndRecipient(post, persona);
    if (latestReplyToPost != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestReplyToPost.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);
}

```

```

        if (post.Id == null){
            performExternalPostIdCheck(post);
        }
    }

    private void performR6PostIdCheck(SocialPost post){
        if(post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private void performExternalPostIdCheck(SocialPost post) {
        if (post.provider == 'Facebook' && post.messageType == 'Private') return;
        if (post.provider == null || post.externalPostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(post.responseContextExternalId != null){
            if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')) {
                SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
                if(replyTo.id != null)
                    return replyTo;
            }
            return findReplyToBasedOnExternalPostIdAndProvider(post);
        }
        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId, Recipient
FROM SocialPost WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId, Recipient
FROM SocialPost WHERE Provider = :post.provider AND ExternalPostId =

```

```

:post.responseContextExternalId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND Recipient = :post.Recipient AND
responseContextExternalId = :post.responseContextExternalId ORDER BY posted DESC NULLS
LAST LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
        List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
        if (!posts.isEmpty()) {
            return posts[0];
        }
    }
    return null;
}

private SocialPost findLatestInboundPostBasedOnPersona(SocialPost post, SocialPersona
persona) {
    if (persona != null && String.isNotBlank(persona.Id) && post != null) {
        List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND PersonaId = :persona.id AND IsOutbound = false ORDER BY CreatedDate
DESC LIMIT 1];
        if (!posts.isEmpty()) {
            return posts[0];
        }
    }
    return null;
}

private SocialPost findLatestOutboundReplyToPostBasedOnPersonaAndRecipient(SocialPost
post, SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.Id) && post != null) {
        List<ExternalSocialAccount> accounts = [SELECT Id FROM ExternalSocialAccount
WHERE ExternalAccountId = :post.Recipient];
        if (!accounts.isEmpty()) {
            ExternalSocialAccount account = accounts[0];
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :persona.ExternalId AND OutboundSocialAccountId =
:account.Id AND IsOutbound = true ORDER BY CreatedDate DESC LIMIT 1];

```

```

        if (!posts.isEmpty()) {
            return posts[0];
        }
    }
}
return null;
}

private void matchPersona(SocialPersona persona) {
    if (persona != null) {
        List<SocialPersona> personaList = new List<SocialPersona>();
        if (persona.Provider != 'Other') {
            if (String.isNotBlank(persona.ExternalId)) {
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                    Provider = :persona.Provider AND
                    ExternalId = :persona.ExternalId LIMIT 1];
            }
            else if (String.isNotBlank(persona.Name)) {
                //this is a best-effort attempt to match: persona.Name is not guaranteed
                to be unique for all networks
                personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                    Provider = :persona.Provider AND
                    Name = :persona.Name LIMIT 1];
            }
        }
        else if (persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
            && String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                MediaProvider = :persona.MediaProvider AND
                ExternalId = :persona.ExternalId LIMIT 1];
        } else if (persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
            String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                MediaProvider = :persona.MediaProvider AND
                Name = :persona.Name LIMIT 1];
        }
    }

    if (!personaList.isEmpty()) {
        persona.Id = personaList[0].Id;
        persona.ParentId = personaList[0].ParentId;
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
        !isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

```

```

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData) {
    return !isUnsentParent(rawData) && (!hasSkipCreateCaseIndicator(rawData) ||
hasPostLabelsThatCreateCase(post));
}

private boolean isUnsentParent(Map<String, Object> rawData) {
    Object unsentParent = rawData.get('unsentParent');
    return unsentParent != null && 'true'.equalsIgnoreCase(String.valueOf(unsentParent));
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

private boolean hasPostLabelsThatCreateCase(SocialPost post){
    Set<String> postLabels = getPostLabels(post);
    postLabels.retainAll(getPostLabelsThatCreateCase());
    return !postLabels.isEmpty();
}

private Set<String> getPostLabels(SocialPost post){
    Set<String> postLabels = new Set<String>();
    if(post.postLabels != null)
        postLabels.addAll(post.postLabels.split(',', 0));
    return postLabels;
}

global String getPersonaFirstName(SocialPersona persona) {
    String name = getPersonaName(persona);
    String firstName = '';
    if (name.contains(' ')) {
        firstName = name.substringBeforeLast(' ');
    }
    firstName = firstName.abbreviate(40);
    return firstName;
}

global String getPersonaLastName(SocialPersona persona) {
    String name = getPersonaName(persona);
    String lastName = name;
    if (name.contains(' ')) {
        lastName = name.substringAfterLast(' ');
    }
    lastName = lastName.abbreviate(80);
    return lastName;
}

```

```

    }

    private String getPersonaName(SocialPersona persona) {
        String name = persona.Name.trim();
        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

    global virtual SObject createPersonaParent(SocialPersona persona) {
        String firstName = getPersonaFirstName(persona);
        String lastName = getPersonaLastName(persona);

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
        String defaultAccountId = getDefaultAccountId();
        if (defaultAccountId != null)
            contact.AccountId = defaultAccountId;
        insert contact;
        return contact;
    }

    private void handlePostAttachments(SocialPost post, Map<String, Object> rawData) {
        String attachmentRawData = JSON.serialize(rawData.get('mediaUrls'));
        if (String.isNotBlank(attachmentRawData)) {
            List<PostAttachment> attachments = (List<PostAttachment>)
JSON.deserialize(attachmentRawData, List<PostAttachment>.class);
            if (attachments != null && !attachments.isEmpty()) {
                createAttachments(post, attachments);
            }
        }
    }

    private void createAttachments(SocialPost post, List<PostAttachment> attachments) {
        List<ContentVersion> contentVersions = new List<ContentVersion>();
        for(PostAttachment attachment : attachments) {
            if (String.isNotBlank(attachment.mediaUrl) && attachment.mediaUrl != null &&
attachment.mediaUrl.length() <= ContentVersion.ContentUrl.getDescribe().getLength()) {
                ContentVersion contentVersion = new ContentVersion();
                contentVersion.contentUrl = attachment.mediaUrl;
                contentVersion.contentLocation = 'L';
                contentVersions.add(contentVersion);
            }
        }
        if (!contentVersions.isEmpty()) {
            insert(contentVersions);
            createLinksForAttachmentsToSocialPost(post, contentVersions);
        }
    }

    private void createLinksForAttachmentsToSocialPost(SocialPost post, List<ContentVersion>
contentVersions) {
        List<Id> versionIds = new List<Id>(new Map<Id,
ContentVersion>(contentVersions).keySet());
    }

```

```

    List<ContentDocument> contentDocuments = [SELECT Id FROM ContentDocument WHERE
LatestPublishedVersionId IN :versionIds];
    List<ContentDocumentLink> contentDocumentLinks = new List<ContentDocumentLink>();

    for(ContentDocument contentDocument : contentDocuments) {
        ContentDocumentLink contentDocLink = new ContentDocumentLink();
        contentDocLink.contentDocumentId = contentDocument.Id;
        contentDocLink.linkedEntityId = post.Id;
        contentDocLink.shareType = 'I';
        contentDocLink.visibility = 'AllUsers';
        contentDocumentLinks.add(contentDocLink);
    }
    if (!contentDocumentLinks.isEmpty()) {
        insert(contentDocumentLinks);
    }
}

public class PostAttachment {
    public String mediaType;
    public String mediaUrl;

    public PostAttachment(String mediaType, String mediaUrl) {
        this.mediaType = mediaType;
        this.mediaUrl = mediaUrl;
    }
}
}

```

Apex Tests for the Default Apex Class

Social Customer Service's tests for the default Apex class code.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

```

@isTest
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }
}

```

```
}

static testMethod void verifyNewRecordCreation() {
    SocialPost post = getSocialPost(sampleSocialData);
    SocialPersona persona = getSocialPersona(sampleSocialData);

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

    SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
    Contact createdContact = [SELECT Id FROM Contact];
    Case createdCase = [SELECT Id, ContactId FROM Case];

    System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```
    System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
    System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```
    System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```
    }

static testMethod void matchSocialPostRecord() {
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.R6PostId = existingPost.R6PostId;
    SocialPersona persona = getSocialPersona(sampleSocialData);

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
```

```
    }

static testMethod void matchSocialPersonaRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;

    SocialPost post = getSocialPost(sampleSocialData);
    SocialPersona persona = getSocialPersona(sampleSocialData);
    persona.ExternalId = existingPersona.ExternalId;

    test.startTest();
```

```

handler.handleInboundSocialPost(post, persona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
Contact createdContact = [SELECT Id FROM Contact];
Case createdCase = [SELECT Id, ContactId FROM Case];

System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```

System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

}

static testMethod void matchCaseRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');

    insert existingCase;
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    existingPost.ParentId = existingCase.Id;
    existingPost.WhoId = existingContact.Id;
    existingPost.PersonaId = existingPersona.Id;
    String recipient = 'scs';
    existingPost.recipient = recipient;
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.responseContextExternalId = existingPost.ExternalPostId;
    post.Recipient = recipient;

    test.startTest();
    handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
    insert existingCase;
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    existingPost.ParentId = existingCase.Id;
    existingPost.WhoId = existingContact.Id;
    existingPost.PersonaId = existingPersona.Id;
    String recipient = 'scs';
    existingPost.recipient = recipient;
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.responseContextExternalId = existingPost.ExternalPostId;
    post.Recipient = recipient;

    test.startTest();
    handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

    System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

}

static SocialPost getSocialPost(Map<String, Object> socialData) {
    SocialPost post = new SocialPost();
    post.Name = String.valueOf(socialData.get('source'));
    post.Content = String.valueOf(socialData.get('content'));
    post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
    post.PostUrl = String.valueOf(socialData.get('postUrl'));
    post.Provider = String.valueOf(socialData.get('mediaProvider'));
    post.MessageType = String.valueOf(socialData.get('messageType'));
    post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
    post.R6PostId = String.valueOf(socialData.get('r6PostId'));
    return post;
}

```

```

static SocialPersona getSocialPersona(Map<String, Object> socialData) {
    SocialPersona persona = new SocialPersona();
    persona.Name = String.valueOf(socialData.get('author'));
    persona.RealName = String.valueOf(socialData.get('realName'));
    persona.Provider = String.valueOf(socialData.get('mediaProvider'));
    persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
    persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
    return persona;
}

static Map<String, Object> getSampleSocialData(String suffix) {
    Map<String, Object> socialData = new Map<String, Object>();
    socialData.put('r6PostId', 'R6PostId' + suffix);
    socialData.put('r6SourceId', 'R6SourceId' + suffix);
    socialData.put('postLabels', null);
    socialData.put('externalPostId', 'ExternalPostId' + suffix);
    socialData.put('content', 'Content' + suffix);
    socialData.put('postDate', '2015-01-12T12:12:12Z');
    socialData.put('mediaType', 'Twitter');
    socialData.put('author', 'Author');
    socialData.put('skipCreateCase', false);
    socialData.put('mediaProvider', 'TWITTER');
    socialData.put('externalUserId', 'ExternalUserId');
    socialData.put('postUrl', 'PostUrl' + suffix);
    socialData.put('messageType', 'Tweet');
    socialData.put('source', 'Source' + suffix);
    socialData.put('replyToExternalPostId', null);
    socialData.put('realName', 'Real Name');
    return socialData;
}
}

```

Data Populated into Social Objects

Details on which fields exist in the standard objects, Social Post and Social Persona, and which fields are currently populated by data from Social Studio.

When Social Studio is configured to work with Social Customer Service (SCS), Social Studio sends data to Salesforce in raw format, which is then decoded by the SCS data intake system and appended to two standard Salesforce objects: Social Post and Social Persona. Social Post contains information that is post specific (posts in this context encompass tweets, Twitter direct messages, Facebook posts, comments, comment replies, etc.). Social Persona stores social identity information gleaned from the author information on posts received by SCS.



Note: If you've modified the default Apex class, you may experience alternate mappings.

Social Post

The following fields exist on the Social Post object.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

Table 11: Social Post Fields

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
AssignedTo	assignedTo	"Joe Smith" (user in Social Studio, not Salesforce)	Not updated
Analyzer Score	analyzerScore	5	Score set on a post in the R6 platform
Attachment Type	mediaUrls array	Image, Video	Populated by SCS when new data arrives in Salesforce - only the first attachment is mapped
Attachment URL	mediaUrls array	http://some.domain/image.jpg	Populated by SCS when new data arrives in Salesforce - only the first attachment is mapped.
Classification	classification	[Custom value]	Populated as admin defines
CommentCount	commentCount	N/A	Not updated
Content	content	Apple teases the new Mac Pro, what do you think	The actual content of the Social post
ExternalPostId	externalPostId	1111222233334444	Native Social Network Id
Handle	author	thehotclothes	N/A
HarvestDate	harvestDate	2013-06-11T13:07:00Z	Date post collected by Social Studio
Headline	source	N/A	Not updated
Id	salesforcePostId	12345678912345	Populated within Salesforce
InboundLinkCount	inboundLinkCount	N/A	Not updated
IsOutbound	N/A	Yes/No	Populated within Salesforce
KeywordGroupName	keywordGroupName	N/A	Not updated
Language	language	English	Populated in SCS
LikesAndVotes	likesAndVotes	N/A	Not updated
MediaProvider	mediaProvider	TWITTER	Social network
MediaType	mediaType	Twitter	Social network
MessageType	messageType	Tweet	Possible values: <ul style="list-style-type: none"> • Twitter: Tweet, Reply, Direct • Facebook: Post, Comment, Reply, Private
Name	source	TWEET FROM:mysamplehandle	System generated by Social Studio.

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
OutboundSocialAccount	N/A	Northern Trails Outfitters	Populated with Social Account used to publish - only for outbound posts
Parent	N/A	00001728 (linked)	Populated with parent case number if Post associated with case
Persona	N/A	Sample Persona	Populated with author Social Persona if one exists
Posted	postDate	2013-06-11T13:07:00Z	Date-time published on social network.
PostPriority	postPriority	High	Priority set within Social Studio.
PostLabels	postLabels	post label 1, post label 2	Tags are comma-separated.
PostUrl	postUrl	http://www.northerntrails.com/brand-us/1111222333444	Link to source post
Provider	mediaProvider	Twitter	Set to social network.
R6PostId	r6PostId	12345678	Native Social Studio post ID.
R6SourceId	r6SourceId	1234	Native Social Studio ID for author.
R6TopicId	r6TopicId	1234567890	Native Social Studio ID for either topic profile or managed account
Recipient	recipientId	12345678912345	Native ID of recipient on social network
RecipientType	recipientType	Person	N/A
ReplyTo	N/A	Another Social Post (linked)	Dynamically filled by Salesforce logic based on replyToExternalPostId from Social Studio
Sentiment	sentiment	Neutral	N/A
Shares	shares	N/A	Not updated
AuthorLabels	authorLabels	author label 1, author label 2	Author labels used to track types of authors
SpamRating	spamRating	NotSpam	N/A
Status	status	N/A	Not updated
StatusMessage	statusMessage	N/A	Not updated
ThreadSize	threadSize	N/A	Not updated

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
TopicProfileName	topicProfileName	@my_handle	Name of TP in Social Studio.sd
TopicType	topicType	Keyword Managed	Whether a topic profile or managed account.
UniqueCommentors	uniqueCommentors	N/A	Not updated
ViewCount	viewCount	N/A	Not updated
Who	N/A	Polymorphic relationship	Can be several other types of records, including Lead. Linked.

Social Persona

The following fields exist on the Social Persona object.

 **Note:** The Social Persona object is only updated when you get a post from someone with an existing persona record. Social Persona is not updated via a parallel process.

Table 12: Social Persona Fields

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
AreWeFollowing	areWeFollowing	N/A	Not updated
Bio	bio	Sample Twitter biography	N/A
ExternalId	externalUserId	1234567890	N/A
ExternalPictureURL	profileIconUrl	http://some.domain/image.jpg	N/A
Followers	followers	290	N/A
Following	following	116	N/A
IsBlacklisted	isBlacklisted	N/A	Not updated
IsDefault	N/A	true/false	This value specifies if this record is used to get the avatar image that is displayed on the contact/account. Its used by Social Contacts.N/A
IsFollowingUs	isFollowingUs	N/A	Not updated
Klout	kloutScore	N/A	Not updated
ListedCount	listed	4	N/A
MediaProvider	mediaProvider	Twitter, Facebook etc.	Social network of profile
MediaType	mediaType	Twitter	N/A
Name	author	Joe Smith	N/A

Salesforce Field	Data Value from Social Studio	Sample Data	Notes
NumberOfFriends	friends	N/A	Not updated
NumberOfTweets	tweets	59546	N/A
Parent	N/A	Contact Name (linked)	Social Persona by default parents to a contact.
ProfileType	authorType	Person	N/A
ProfileUrl	profileUrl	http://twitter.com/mysamplehandle	N/A
Provider	mediaProvider	other	Similar to mediaType but allows fewer values.
R6SourceId	r6SourceId	123456789	Native ID for author
RealName	realName	Joe Smith	N/A
TopicType	topicType	Keyword or Managed	N/A

Additional Data From Social Studio

In addition to the data noted above, certain fields come in the raw data from Social Studio but are not automatically mapped to fields within the Social Post and Social Persona objects. You can access these fields through Visualforce or Apex.

Table 13: Additional Data Fields from Social Studio

Raw Data Field	Notes
authorTags	String
classifiers	Classifier[]
createLead	Boolean
firstName	String
jobId	String
lastName	String
mediaUrls	Raw data comes through as an array of all attachments. SCS matches the first attachment with a known type (image video) to SocialPost.AttachmentType and SocialPost.AttachmentURL
originalAvatar	String
originalFullName	String
originalScreenName	String
origins	String
privacy	String
r6ParentPostId	Long

Raw Data Field	Notes
recipientId	String
replyToExternalPostId	Raw data used to look up 'In Reply To' Social Post but field not directly written into Social Post
skipCreateCase	Used for the moderation feature introduced in the Summer '14 release; if Yes, SCS skips case creation in the default logic. This field can also be used in customer-specific logic

Default Apex Class History

Social Customer Service's full default Apex class for prior releases.

For the current release, see [Default Apex Class Reference](#) on page 476

Default Apex Class and Test for Spring '18

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

```
global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = SocialPost.Content.getDescribe().getLength();

    final static Integer SUBJECT_MAX_LENGTH = Case.Subject.getDescribe().getLength();
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    // Create a case if one of these post labels are on the SocialPost, regardless of the
    skipCreateCase indicator.
    global virtual Set<String> getPostLabelsThatCreateCase() {
        return new Set<String>();
    }

    // If true, use the active case assignment rule if one is found
    global virtual Boolean getUsingCaseAssignmentRule() {
        return false;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }
}
```

```

    }

    global virtual String getCaseSubject(SocialPost post) {
        String caseSubject = post.Name;
        if (hasReview(post)) {
            String ratingsStr = getRatingString(post);
            caseSubject = ratingsStr + ' • ' + caseSubject;
        }

        return caseSubject;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);
        setModeration(post, rawData);

        upsert post;

        if(isNewCaseCreated){
            updateCaseSource(post, parentCase);
        }

        handlePostAttachments(post, rawData);

        return result;
    }

    private void setModeration(SocialPost post, Map<String, Object> rawData){
        //if we don't automatically create a case, we should flag the post as requiring
moderator review.
        if(post.parentId == null && !isUnsentParent(rawData))
            post.reviewedStatus = 'Needed';
    }

    private void updateCaseSource(SocialPost post, Case parentCase){
        if(parentCase != null) {

```

```

        parentCase.SourceId = post.Id;
        //update as a new subject to prevent undoing any changes done by insert triggers

        update new Case(Id = parentCase.Id, SourceId = parentCase.SourceId);
    }
}

private void handleExistingPost(SocialPost post, SocialPersona persona) {
    List<SocialPost> existingPosts = [Select Recipient, IsOutbound from SocialPost where
id = :post.Id limit 1];

    // for any existing outbound post, we don't overwrite its recipient field
    if (!existingPosts.isEmpty() && existingPosts[0].IsOutBound == true &&
String.isNotBlank(existingPosts[0].Recipient)) {
        post.Recipient = existingPosts[0].Recipient;
    }

    update post;
    if (persona.id != null)
        updatePersona(persona);
}

private void setReplyTo(SocialPost post, SocialPersona persona) {
    SocialPost replyTo = findReplyTo(post, persona);
    if(replyTo.id != null) {
        post.replyToId = replyTo.id;
        post.replyTo = replyTo;
    }
}

private SocialPersona buildPersona(SocialPersona persona) {
    if (persona.Id == null)
        createPersona(persona);
    else
        updatePersona(persona);

    return persona;
}

private void updatePersona(SocialPersona persona) {
    try{
        update persona;
    }catch(Exception e) {
        System.debug('Error updating social persona: ' + e.getMessage());
    }
}

private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rowData){
    if(!isUnsentParent(rowData)) {
        Case parentCase = findParentCase(post, persona);
        if (parentCase != null) {
            if (!parentCase.IsClosed) {

```

```

        return parentCase;
    }
    else if (caseShouldBeReopened(parentCase)) {
        reopenCase(parentCase);
        return parentCase;
    }
}
if(shouldCreateCase(post, rawData)){
    isNewCaseCreated = true;
    return createCase(post, persona);
}
}

return null;
}

private boolean caseShouldBeReopened(Case c){
    return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
}

private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
    if (persona.Id != null) {
        postToUpdate.PersonaId = persona.Id;

        if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
            postToUpdate.WhoId = persona.ParentId;
        }
    }
    if(parentCase != null) {
        postToUpdate.ParentId = parentCase.Id;
    }
}

private Boolean hasReview(SocialPost post) {
    return post.ReviewScore != null;
}

private String getRatingString(SocialPost post) {
    Integer maxNumberOfStars = 5;
    Double reviewScore = post.ReviewScore;
    Double reviewScale = post.ReviewScale;
    if (reviewScore == null) {
        reviewScore = 0;
    }
    if (reviewScale == null) {
        reviewScale = maxNumberOfStars;
    }
    Integer numberOfStars = Math.floor((reviewScore / reviewScale) *
maxNumberOfStars).intValue();
    return numberOfStars.format() + '-Star';
}

```

```

private Case createCase(SocialPost post, SocialPersona persona) {
    String caseSubject = getCaseSubject(post).abbreviate(SUBJECT_MAX_LENGTH);

    Case newCase = new Case(subject = caseSubject);
    if (persona != null && persona.ParentId != null) {
        if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
            newCase.ContactId = persona.ParentId;
        } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
            newCase.AccountId = persona.ParentId;
        }
    }
    if (post != null && post.Provider != null) {
        newCase.Origin = post.Provider;
    }

    if (getUsingCaseAssignmentRule()){
        //Find the active assignment rules on case
        AssignmentRule[] rules = [select id from AssignmentRule where SubjectType =
'Case' and Active = true limit 1];

        if (rules.size() > 0){
            //Creating the DMLOptions for "Assign using active assignment rules"
checkbox
            Database.DMLOptions dmlOpts = new Database.DMLOptions();
            dmlOpts.assignmentRuleHeader.assignmentRuleId= rules[0].id;

            //Setting the DMLOption on Case instance
            newCase.setOptions(dmlOpts);
        }
    }

    insert newCase;
    return newCase;
}

private Case findParentCase(SocialPost post, SocialPersona persona) {
    Case parentCase = null;
    if (!isChat(post) && isReplyingToOutboundPost(post) &&
isSocialPostRecipientSameAsPersona(post.ReplyTo, persona) ||
(!isReplyingToOutboundPost(post) && isReplyingToSelf(post, persona))) {
        parentCase = findParentCaseFromPostReply(post);
        if (isParentCaseValid(parentCase)) {
            return parentCase;
        }
    }

    parentCase = findParentCaseFromPersonaAndRecipient(post, persona);
    if (parentCase == null && isChat(post)) {
        parentCase = findParentCaseOfChatFromPersonaAndRecipient(post, persona);
    }
    return parentCase;
}

private boolean isChat(SocialPost post) {

```

```

        return post.messageType == 'Private' || post.messageType == 'Direct';
    }

    private boolean isParentCaseValid(Case parentCase) {
        return parentCase != null && (!parentCase.IsClosed ||
caseShouldBeReopened(parentCase));
    }

    private Case findParentCaseFromPostReply(SocialPost post) {
        if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
            if(!cases.isEmpty()) {
                return cases[0];
            }
        }
        return null;
    }

    // reply to outbound post
    private boolean isReplyingToOutboundPost(SocialPost post) {
        return (post != null && post.ReplyTo != null && post.ReplyTo.IsOutbound);
    }

    // replyTo.recipient == inboundSocialPost.persona.externalId
    private boolean isSocialPostRecipientSameAsPersona(SocialPost postWithRecipient,
SocialPersona persona) {
        return (postWithRecipient != null && postWithRecipient.Recipient ==
persona.ExternalId);
    }

    // is replying to self
    private boolean isReplyingToSelf(SocialPost post, SocialPersona persona) {
        return (post != null &&
            persona != null &&
            String.isNotBlank(persona.Id) &&
            post.ReplyTo != null &&
            String.isNotBlank(post.ReplyTo.PersonaId) &&
            post.ReplyTo.PersonaId == persona.id);
    }

    private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
        SocialPost latestInboundPostWithSamePersona =
findLatestInboundPostBasedOnPersona(post, persona);
        if (latestInboundPostWithSamePersona != null) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersona.parentId LIMIT 1];
            if(!cases.isEmpty()) {
                return cases[0];
            }
        }
        return null;
    }
}

```

```

    private Case findParentCaseFromPersonaAndRecipient(SocialPost post, SocialPersona
persona) {
        SocialPost lastestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
        if (lastestInboundPostWithSamePersonaAndRecipient != null) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :lastestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
            if(!cases.isEmpty()) {
                return cases[0];
            }
        }
        return null;
    }

    private Case findParentCaseOfChatFromPersonaAndRecipient(SocialPost post, SocialPersona
persona) {
        SocialPost lastestReplyToPost =
findLatestOutboundReplyToPostBasedOnPersonaAndRecipient(post, persona);
        if (lastestReplyToPost != null) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :lastestReplyToPost.parentId LIMIT 1];
            if(!cases.isEmpty()) {
                return cases[0];
            }
        }
        return null;
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null) return;

        performR6PostIdCheck(post);

        if (post.Id == null){
            performExternalPostIdCheck(post);
        }
    }

    private void performR6PostIdCheck(SocialPost post){
        if(post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

```

```

private void performExternalPostIdCheck(SocialPost post) {
    if (post.provider == 'Facebook' && post.messageType == 'Private') return;
    if (post.provider == null || post.externalPostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
    if(post.replyToId != null && post.replyTo == null)
        return findReplyToBasedOnReplyToId(post);
    if(post.responseContextExternalId != null){
        if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
            SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
            if(replyTo.id != null)
                return replyTo;
        }
        return findReplyToBasedOnExternalPostIdAndProvider(post);
    }
    return new SocialPost();
}

private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId, Recipient
FROM SocialPost WHERE id = :post.replyToId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId, Recipient
FROM SocialPost WHERE Provider = :post.provider AND ExternalPostId =
:post.responseContextExternalId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND responseContextExternalId =
:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

```

```

    }

    private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                return posts[0];
            }
        }
        return null;
    }

    private SocialPost findLatestInboundPostBasedOnPersona(SocialPost post, SocialPersona
persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null) {
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND PersonaId = :persona.id AND IsOutbound = false ORDER BY CreatedDate
DESC LIMIT 1];
            if (!posts.isEmpty()) {
                return posts[0];
            }
        }
        return null;
    }

    private SocialPost findLatestOutboundReplyToPostBasedOnPersonaAndRecipient(SocialPost
post, SocialPersona persona) {
        if (persona != null && String.isNotBlank(persona.Id) && post != null) {
            List<ExternalSocialAccount> accounts = [SELECT Id FROM ExternalSocialAccount
WHERE ExternalAccountId = :post.Recipient];
            if (!accounts.isEmpty()) {
                ExternalSocialAccount account = accounts[0];
                List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :persona.ExternalId AND OutboundSocialAccountId =
:account.Id AND IsOutbound = true ORDER BY CreatedDate DESC LIMIT 1];
                if (!posts.isEmpty()) {
                    return posts[0];
                }
            }
        }
        return null;
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null) {
            List<SocialPersona> personaList = new List<SocialPersona>();
            if (persona.Provider != 'Other') {
                if (String.isNotBlank(persona.ExternalId)) {
                    personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
Provider = :persona.Provider AND

```

```

        ExternalId = :persona.ExternalId LIMIT 1];
    }
    else if (String.isNotBlank(persona.Name)) {
        //this is a best-effort attempt to match: persona.Name is not guaranteed
to be unique for all networks
        personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
            Provider = :persona.Provider AND
            Name = :persona.Name LIMIT 1];
    }
}
else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
    personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
        MediaProvider = :persona.MediaProvider AND
        ExternalId = :persona.ExternalId LIMIT 1];
} else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
    personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
        MediaProvider = :persona.MediaProvider AND
        Name = :persona.Name LIMIT 1];
}

if (!personaList.isEmpty()) {
    persona.Id = personaList[0].Id;
    persona.ParentId = personaList[0].ParentId;
}
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData) {
    return !isUnsentParent(rawData) && (!hasSkipCreateCaseIndicator(rawData) ||
hasPostLabelsThatCreateCase(post));
}

private boolean isUnsentParent(Map<String, Object> rawData) {
    Object unsentParent = rawData.get('unsentParent');
    return unsentParent != null && 'true'.equalsIgnoreCase(String.valueOf(unsentParent));
}

```

```

    }

    private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
        Object skipCreateCase = rawData.get('skipCreateCase');
        return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
    }

    private boolean hasPostLabelsThatCreateCase(SocialPost post){
        Set<String> postLabels = getPostLabels(post);
        postLabels.retainAll(getPostLabelsThatCreateCase());
        return !postLabels.isEmpty();
    }

    private Set<String> getPostLabels(SocialPost post){
        Set<String> postLabels = new Set<String>();
        if(post.postLabels != null)
            postLabels.addAll(post.postLabels.split(', ', 0));
        return postLabels;
    }

    global String getPersonaFirstName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String firstName = '';
        if (name.contains(' ')) {
            firstName = name.substringBeforeLast(' ');
        }
        firstName = firstName.abbreviate(40);
        return firstName;
    }

    global String getPersonaLastName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String lastName = name;
        if (name.contains(' ')) {
            lastName = name.substringAfterLast(' ');
        }
        lastName = lastName.abbreviate(80);
        return lastName;
    }

    private String getPersonaName(SocialPersona persona) {
        String name = persona.Name.trim();
        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

    global virtual SObject createPersonaParent(SocialPersona persona) {
        String firstName = getPersonaFirstName(persona);
        String lastName = getPersonaLastName(persona);

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
    }

```

```

String defaultAccountId = getDefaultAccountId();
if (defaultAccountId != null)
    contact.AccountId = defaultAccountId;
insert contact;
return contact;
}

private void handlePostAttachments(SocialPost post, Map<String, Object> rawData) {
    String attachmentRawData = JSON.serialize(rawData.get('mediaUrls'));
    if (String.isNotBlank(attachmentRawData)) {
        List<PostAttachment> attachments = (List<PostAttachment>)
JSON.deserialize(attachmentRawData, List<PostAttachment>.class);
        if (attachments != null && !attachments.isEmpty()) {
            createAttachments(post, attachments);
        }
    }
}

private void createAttachments(SocialPost post, List<PostAttachment> attachments) {
    List<ContentVersion> contentVersions = new List<ContentVersion>();
    for(PostAttachment attachment : attachments) {
        if (String.isNotBlank(attachment.mediaUrl) && attachment.mediaUrl != null &&
attachment.mediaUrl.length() <= ContentVersion.ContentUrl.getDescribe().getLength()) {
            ContentVersion contentVersion = new ContentVersion();
            contentVersion.contentUrl = attachment.mediaUrl;
            contentVersion.contentLocation = 'L';
            contentVersions.add(contentVersion);
        }
    }
    if (!contentVersions.isEmpty()) {
        insert(contentVersions);
        createLinksForAttachmentsToSocialPost(post, contentVersions);
    }
}

private void createLinksForAttachmentsToSocialPost(SocialPost post, List<ContentVersion>
contentVersions) {
    List<Id> versionIds = new List<Id>(new Map<Id,
ContentVersion>(contentVersions).keySet());
    List<ContentDocument> contentDocuments = [SELECT Id FROM ContentDocument WHERE
LatestPublishedVersionId IN :versionIds];
    List<ContentDocumentLink> contentDocumentLinks = new List<ContentDocumentLink>();

    for(ContentDocument contentDocument : contentDocuments) {
        ContentDocumentLink contentDocLink = new ContentDocumentLink();
        contentDocLink.contentDocumentId = contentDocument.Id;
        contentDocLink.linkedEntityId = post.Id;
        contentDocLink.shareType = 'I';
        contentDocLink.visibility = 'AllUsers';
        contentDocumentLinks.add(contentDocLink);
    }
    if (!contentDocumentLinks.isEmpty()) {
        insert(contentDocumentLinks);
    }
}

```

```

    }

    public class PostAttachment {
        public String mediaType;
        public String mediaUrl;

        public PostAttachment(String mediaType, String mediaUrl) {
            this.mediaType = mediaType;
            this.mediaUrl = mediaUrl;
        }
    }
}

```

Test

```

@Test
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```

        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchSocialPostRecord() {
        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        insert existingPost;

        SocialPost post = getSocialPost(sampleSocialData);

```

```

    post.R6PostId = existingPost.R6PostId;
    SocialPersona persona = getSocialPersona(sampleSocialData);

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
}

static testMethod void matchSocialPersonaRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;

    SocialPost post = getSocialPost(sampleSocialData);
    SocialPersona persona = getSocialPersona(sampleSocialData);
    persona.ExternalId = existingPersona.ExternalId;

    test.startTest();
    handler.handleInboundSocialPost(post, persona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

    SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
    Contact createdContact = [SELECT Id FROM Contact];
    Case createdCase = [SELECT Id, ContactId FROM Case];

    System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona. ');
    System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact ');
    System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case. ');
    System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case. ');
}

static testMethod void matchCaseRecord() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');

    insert existingCase;
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    existingPost.ParentId = existingCase.Id;
    existingPost.WhoId = existingContact.Id;

```

```

existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

    test.startTest();
    handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
    Contact existingContact = new Contact(LastName = 'LastName');
    insert existingContact;
    SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
    existingPersona.ParentId = existingContact.Id;
    insert existingPersona;
    Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
    insert existingCase;
    SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
    existingPost.ParentId = existingCase.Id;
    existingPost.WhoId = existingContact.Id;
    existingPost.PersonaId = existingPersona.Id;
    insert existingPost;

    SocialPost post = getSocialPost(sampleSocialData);
    post.responseContextExternalId = existingPost.ExternalPostId;

    test.startTest();
    handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
    test.stopTest();

    SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

        System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

    }

    static SocialPost getSocialPost(Map<String, Object> socialData) {
        SocialPost post = new SocialPost();
        post.Name = String.valueOf(socialData.get('source'));
        post.Content = String.valueOf(socialData.get('content'));
        post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
        post.PostUrl = String.valueOf(socialData.get('postUrl'));
        post.Provider = String.valueOf(socialData.get('mediaProvider'));
        post.MessageType = String.valueOf(socialData.get('messageType'));
        post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
        post.R6PostId = String.valueOf(socialData.get('r6PostId'));
        return post;
    }

    static SocialPersona getSocialPersona(Map<String, Object> socialData) {
        SocialPersona persona = new SocialPersona();
        persona.Name = String.valueOf(socialData.get('author'));
        persona.RealName = String.valueOf(socialData.get('realName'));
        persona.Provider = String.valueOf(socialData.get('mediaProvider'));
        persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
        persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
        return persona;
    }

    static Map<String, Object> getSampleSocialData(String suffix) {
        Map<String, Object> socialData = new Map<String, Object>();
        socialData.put('r6PostId', 'R6PostId' + suffix);
        socialData.put('r6SourceId', 'R6SourceId' + suffix);
        socialData.put('postLabels', null);
        socialData.put('externalPostId', 'ExternalPostId' + suffix);
        socialData.put('content', 'Content' + suffix);
        socialData.put('postDate', '2015-01-12T12:12Z');
        socialData.put('mediaType', 'Twitter');
        socialData.put('author', 'Author');
        socialData.put('skipCreateCase', false);
        socialData.put('mediaProvider', 'TWITTER');
        socialData.put('externalUserId', 'ExternalUserId');
        socialData.put('postUrl', 'PostUrl' + suffix);
        socialData.put('messageType', 'Tweet');
        socialData.put('source', 'Source' + suffix);
        socialData.put('replyToExternalPostId', null);
        socialData.put('realName', 'Real Name');
        return socialData;
    }
}

```

Default Apex Class and Test for Spring '16

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{

```

```

final static Integer CONTENT_MAX_LENGTH = 32000;
Boolean isNewCaseCreated = false;

// Reopen case if it has not been closed for more than this number
global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
    return 5;
}

// Create a case if one of these post labels are on the SocialPost, regardless of the
skipCreateCase indicator.
global virtual Set<String> getPostLabelsThatCreateCase() {
    return new Set<String>();
}

global virtual String getDefaultAccountId() {
    return null;
}

global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);
    matchPost(post);
    matchPersona(persona);

    if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
        post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
    }

    if (post.Id != null) {
        handleExistingPost(post, persona);
        return result;
    }

    setReplyTo(post, persona);
    buildPersona(persona);
    Case parentCase = buildParentCase(post, persona, rawData);
    setRelationshipsOnPost(post, persona, parentCase);
    setModeration(post);

    upsert post;

    if(isNewCaseCreated){
        updateCaseSource(post, parentCase);
    }

    return result;
}

private void setModeration(SocialPost post){
    //if we don't automatically create a case, we should flag the post as requiring
moderator review.
    if(post.parentId == null)
        post.reviewedStatus = 'Needed';
}

```

```

}

private void updateCaseSource(SocialPost post, Case parentCase){
    if(parentCase != null) {
        parentCase.SourceId = post.Id;
        update parentCase;
    }
}

private void handleExistingPost(SocialPost post, SocialPersona persona) {
    update post;
    if (persona.id != null)
        updatePersona(persona);
}

private void setReplyTo(SocialPost post, SocialPersona persona) {
    SocialPost replyTo = findReplyTo(post, persona);
    if(replyTo.id != null) {
        post.replyToId = replyTo.id;
        post.replyTo = replyTo;
    }
}

private SocialPersona buildPersona(SocialPersona persona) {
    if (persona.Id == null)
        createPersona(persona);
    else
        updatePersona(persona);

    return persona;
}

private void updatePersona(SocialPersona persona) {
    try{
        update persona;
    }catch(Exception e) {
        System.debug('Error updating social persona: ' + e.getMessage());
    }
}

private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
    Case parentCase = findParentCase(post, persona);
    if (parentCase != null) {
        if (!parentCase.IsClosed) {
            return parentCase;
        }
        else if (caseShouldBeReopened(parentCase)) {
            reopenCase(parentCase);
            return parentCase;
        }
    }
}

if(shouldCreateCase(post, rawData)){

```

```

        isNewCaseCreated = true;
        return createCase(post, persona);
    }

    return null;
}

private boolean caseShouldBeReopened(Case c){
    return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
}

private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
    if (persona.Id != null) {
        postToUpdate.PersonaId = persona.Id;

        if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
            postToUpdate.WhoId = persona.ParentId;
        }
    }
    if(parentCase != null) {
        postToUpdate.ParentId = parentCase.Id;
    }
}

private Case createCase(SocialPost post, SocialPersona persona) {
    Case newCase = new Case(subject = post.Name);
    if (persona != null && persona.ParentId != null) {
        if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
            newCase.ContactId = persona.ParentId;
        } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
            newCase.AccountId = persona.ParentId;
        }
    }
    if (post != null && post.Provider != null) {
        newCase.Origin = post.Provider;
    }
    insert newCase;
    return newCase;
}

private Case findParentCase(SocialPost post, SocialPersona persona) {
    Case parentCase = null;
    if (post.ReplyTo != null && !isReplyingToAnotherCustomer(post, persona) &&
!isChat(post)) {
        parentCase = findParentCaseFromPostReply(post);
    }
    if (parentCase == null) {
        parentCase = findParentCaseFromPersona(post, persona);
    }
    return parentCase;
}

```

```

private boolean isReplyingToAnotherCustomer(SocialPost post, SocialPersona persona){
    return !post.ReplyTo.IsOutbound && post.ReplyTo.PersonaId != persona.Id;
}

private boolean isChat(SocialPost post){
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);

    if (post.Id == null){
        performExternalPostIdCheck(post);
    }
}

private void performR6PostIdCheck(SocialPost post){
    if(post.R6PostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
}

```

```

        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private void performExternalPostIdCheck(SocialPost post) {
        if (post.provider == 'Facebook' && post.messageType == 'Private') return;
        if (post.provider == null || post.externalPostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(post.responseContextExternalId != null){
            if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
                SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
                if(replyTo.id != null)
                    return replyTo;
            }
            return findReplyToBasedOnExternalPostIdAndProvider(post);
        }
        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :post.responseContextExternalId LIMIT
1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND responseContextExternalId =

```

```

:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
        List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
        if (!posts.isEmpty()) {
            return posts[0];
        }
    }
    return null;
}

private void matchPersona(SocialPersona persona) {
    if (persona != null) {
        List<SocialPersona> personaList = new List<SocialPersona>();
        if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
Provider = :persona.Provider AND
ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
Name = :persona.Name LIMIT 1];
        }

        if (!personaList.isEmpty()) {
            persona.Id = personaList[0].Id;
            persona.ParentId = personaList[0].ParentId;
        }
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

```

```

}

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData){
    return !hasSkipCreateCaseIndicator(rawData) || hasPostLabelsThatCreateCase(post);
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

private boolean hasPostLabelsThatCreateCase(SocialPost post){
    Set<String> postLabels = getPostLabels(post);
    postLabels.retainAll(getPostLabelsThatCreateCase());
    return !postLabels.isEmpty();
}

private Set<String> getPostLabels(SocialPost post){
    Set<String> postLabels = new Set<String>();
    if(post.postLabels != null)
        postLabels.addAll(post.postLabels.split(',', 0));
    return postLabels;
}

global String getPersonaFirstName(SocialPersona persona) {
    String name = getPersonaName(persona);
    String firstName = '';
    if (name.contains(' ')) {
        firstName = name.substringBeforeLast(' ');
    }
    firstName = firstName.abbreviate(40);
    return firstName;
}

global String getPersonaLastName(SocialPersona persona) {
    String name = getPersonaName(persona);
    String lastName = name;
    if (name.contains(' ')) {
        lastName = name.substringAfterLast(' ');
    }
    lastName = lastName.abbreviate(80);
    return lastName;
}

private String getPersonaName(SocialPersona persona) {
    String name = persona.Name.trim();

```

```

        if (String.isNotBlank(persona.RealName)) {
            name = persona.RealName.trim();
        }
        return name;
    }

    global virtual SObject createPersonaParent(SocialPersona persona) {

        String firstName = getPersonaFirstName(persona);
        String lastName = getPersonaLastName(persona);

        Contact contact = new Contact(LastName = lastName, FirstName = firstName);
        String defaultAccountId = getDefaultAccountId();
        if (defaultAccountId != null)
            contact.AccountId = defaultAccountId;
        insert contact;
        return contact;
    }

}

```

Test

```

@Test
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchSocialPostRecord() {
        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        insert existingPost;

        SocialPost post = getSocialPost(sampleSocialData);
        post.R6PostId = existingPost.R6PostId;
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
```

```

    }

    static testMethod void matchSocialPersonaRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;

        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);
        persona.ExternalId = existingPersona.ExternalId;

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```

        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchCaseRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
```

```

SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');

insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
Contact existingContact = new Contact(LastName = 'LastName');
insert existingContact;
SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
```

```

WHERE R6PostId = :post.R6PostId];
    System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

    System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

    System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

    System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

    System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

}

static SocialPost getSocialPost(Map<String, Object> socialData) {
    SocialPost post = new SocialPost();
    post.Name = String.valueOf(socialData.get('source'));
    post.Content = String.valueOf(socialData.get('content'));
    post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
    post.PostUrl = String.valueOf(socialData.get('postUrl'));
    post.Provider = String.valueOf(socialData.get('mediaProvider'));
    post.MessageType = String.valueOf(socialData.get('messageType'));
    post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
    post.R6PostId = String.valueOf(socialData.get('r6PostId'));
    return post;
}

static SocialPersona getSocialPersona(Map<String, Object> socialData) {
    SocialPersona persona = new SocialPersona();
    persona.Name = String.valueOf(socialData.get('author'));
    persona.RealName = String.valueOf(socialData.get('realName'));
    persona.Provider = String.valueOf(socialData.get('mediaProvider'));
    persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
    persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
    return persona;
}

static Map<String, Object> getSampleSocialData(String suffix) {
    Map<String, Object> socialData = new Map<String, Object>();
    socialData.put('r6PostId', 'R6PostId' + suffix);
    socialData.put('r6SourceId', 'R6SourceId' + suffix);
    socialData.put('postLabels', null);
    socialData.put('externalPostId', 'ExternalPostId' + suffix);
    socialData.put('content', 'Content' + suffix);
    socialData.put('postDate', '2015-01-12T12:12:12Z');
    socialData.put('mediaType', 'Twitter');
    socialData.put('author', 'Author');
    socialData.put('skipCreateCase', false);
    socialData.put('mediaProvider', 'TWITTER');
    socialData.put('externalUserId', 'ExternalUserId');
    socialData.put('postUrl', 'PostUrl' + suffix);
    socialData.put('messageType', 'Tweet');
    socialData.put('source', 'Source' + suffix);
    socialData.put('replyToExternalPostId', null);
    socialData.put('realName', 'Real Name');
```

```

        return socialData;
    }
}

```

Default Apex Class and Test for Winter '15

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = 32000;
    Boolean isNewCaseCreated = false;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    // Create a case if one of these post labels are on the SocialPost, regardless of the
    skipCreateCase indicator.
    global virtual Set<String> getPostLabelsThatCreateCase(){
        return new Set<String>();
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);

        upsert post;

        if(isNewCaseCreated){
            updateCaseSource(post, parentCase);
        }
    }
}

```

```
        return result;
    }

    private void updateCaseSource(SocialPost post, Case parentCase){
        if(parentCase != null) {
            parentCase.SourceId = post.Id;
            update parentCase;
        }
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)
            updatePersona(persona);
    }

    private void setReplyTo(SocialPost post, SocialPersona persona) {
        SocialPost replyTo = findReplyTo(post, persona);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            updatePersona(persona);

        return persona;
    }

    private void updatePersona(SocialPersona persona) {
        try{
            update persona;
        }catch(Exception e) {
            System.debug('Error updating social persona: ' + e.getMessage());
        }
    }

    private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
        Case parentCase = findParentCase(post, persona);
        if (parentCase != null) {
            if (!parentCase.IsClosed) {
                return parentCase;
            }
            else if (caseShouldBeReopened(parentCase)) {
                reopenCase(parentCase);
                return parentCase;
            }
        }
    }
}
```

```

        if(shouldCreateCase(post, rawData)){
            isNewCaseCreated = true;
            return createCase(post, persona);
        }

        return null;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
        if (persona.Id != null) {
            postToUpdate.PersonaId = persona.Id;

            if(persona.ParentId.getSObjectType() != SocialPost.sObjectType) {
                postToUpdate.WhoId = persona.ParentId;
            }
        }
        if(parentCase != null) {
            postToUpdate.ParentId = parentCase.Id;
        }
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
                newCase.ContactId = persona.ParentId;
            } else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
                newCase.AccountId = persona.ParentId;
            }
        }
        if (post != null && post.Provider != null) {
            newCase.Origin = post.Provider;
        }
        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = null;
        if (post.ReplyTo != null && !isReplyingToAnotherCustomer(post, persona) &&
!isChat(post)) {
            parentCase = findParentCaseFromPostReply(post);
        }
        if (parentCase == null) {
            parentCase = findParentCaseFromPersona(post, persona);
        }
        return parentCase;
    }

```

```

private boolean isReplyingToAnotherCustomer(SocialPost post, SocialPersona persona){
    return !post.ReplyTo.IsOutbound && post.ReplyTo.PersonaId != persona.Id;
}

private boolean isChat(SocialPost post){
    return post.messageType == 'Private' || post.messageType == 'Direct';
}

private Case findParentCaseFromPostReply(SocialPost post) {
    if (post.ReplyTo != null && String.isNotBlank(post.ReplyTo.ParentId)) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private Case findParentCaseFromPersona(SocialPost post, SocialPersona persona) {
    SocialPost latestInboundPostWithSamePersonaAndRecipient =
findLatestInboundPostBasedOnPersonaAndRecipient(post, persona);
    if (latestInboundPostWithSamePersonaAndRecipient != null) {
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
id = :latestInboundPostWithSamePersonaAndRecipient.parentId LIMIT 1];
        if(!cases.isEmpty()) {
            return cases[0];
        }
    }
    return null;
}

private void reopenCase(Case parentCase) {
    SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
    parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
    update parentCase;
}

private void matchPost(SocialPost post) {
    if (post.Id != null) return;

    performR6PostIdCheck(post);

    if (post.Id == null){
        performExternalPostIdCheck(post);
    }
}

private void performR6PostIdCheck(SocialPost post){
    if(post.R6PostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =

```

```

:post.R6PostId LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private void performExternalPostIdCheck(SocialPost post) {
    if (post.provider == 'Facebook' && post.messageType == 'Private') return;
    if (post.provider == null || post.externalPostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
    if(post.replyToId != null && post.replyTo == null)
        return findReplyToBasedOnReplyToId(post);
    if(post.responseContextExternalId != null){
        if((post.provider == 'Facebook' && post.messageType == 'Private') ||
(post.provider == 'Twitter' && post.messageType == 'Direct')){
            SocialPost replyTo =
findReplyToBasedOnResponseContextExternalPostIdAndProvider(post);
            if(replyTo.id != null)
                return replyTo;
        }
        return findReplyToBasedOnExternalPostIdAndProvider(post);
    }
    return new SocialPost();
}

private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :post.responseContextExternalId LIMIT
1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnResponseContextExternalPostIdAndProvider(SocialPost
post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost

```

```

WHERE Provider = :post.provider AND responseContextExternalId =
:post.responseContextExternalId ORDER BY posted DESC NULLS LAST LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findLatestInboundPostBasedOnPersonaAndRecipient(SocialPost post,
SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.Id) && post != null &&
String.isNotBlank(post.Recipient)) {
        List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE Provider
= :post.provider AND Recipient = :post.Recipient AND PersonaId = :persona.id AND IsOutbound
= false ORDER BY CreatedDate DESC LIMIT 1];
        if (!posts.isEmpty()) {
            return posts[0];
        }
    }
    return null;
}

private void matchPersona(SocialPersona persona) {
    if (persona != null) {
        List<SocialPersona> personaList = new List<SocialPersona>();
        if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
Provider = :persona.Provider AND
ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
MediaProvider = :persona.MediaProvider AND
Name = :persona.Name LIMIT 1];
        }

        if (!personaList.isEmpty()) {
            persona.Id = personaList[0].Id;
            persona.ParentId = personaList[0].ParentId;
        }
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
}

```

```
        insert persona;
    }

    private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
        return String.isNotBlank(persona.Name) &&
            String.isNotBlank(persona.Provider) &&
            String.isNotBlank(persona.MediaProvider);
    }

    private boolean shouldCreateCase(SocialPost post, Map<String, Object> rawData){
        return !hasSkipCreateCaseIndicator(rawData) || hasPostLabelsThatCreateCase(post);
    }

    private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
        Object skipCreateCase = rawData.get('skipCreateCase');
        return skipCreateCase != null &&
            'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
    }

    private boolean hasPostLabelsThatCreateCase(SocialPost post){
        Set<String> postLabels = getPostLabels(post);
        postLabels.retainAll(getPostLabelsThatCreateCase());
        return !postLabels.isEmpty();
    }

    private Set<String> getPostLabels(SocialPost post){
        Set<String> postLabels = new Set<String>();
        if(post.postLabels != null)
            postLabels.addAll(post.postLabels.split(',', 0));
        return postLabels;
    }

    global String getPersonaFirstName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String firstName = '';
        if (name.contains(' ')) {
            firstName = name.substringBeforeLast(' ');
        }
        firstName = firstName.abbreviate(40);
        return firstName;
    }

    global String getPersonaLastName(SocialPersona persona) {
        String name = getPersonaName(persona);
        String lastName = name;
        if (name.contains(' ')) {
            lastName = name.substringAfterLast(' ');
        }
        lastName = lastName.abbreviate(80);
        return lastName;
    }

    private String getPersonaName(SocialPersona persona) {
```

```

String name = persona.Name.trim();
if (String.isNotBlank(persona.RealName)) {
    name = persona.RealName.trim();
}
return name;
}

global virtual SObject createPersonaParent(SocialPersona persona) {

    String firstName = getPersonaFirstName(persona);
    String lastName = getPersonaLastName(persona);

    Contact contact = new Contact(LastName = lastName, FirstName = firstName);
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null)
        contact.AccountId = defaultAccountId;
    insert contact;
    return contact;
}

}

```

Test

```

@isTest
public class InboundSocialPostHandlerImplTest {

    static Map<String, Object> sampleSocialData;
    static Social.InboundSocialPostHandlerImpl handler;

    static {
        handler = new Social.InboundSocialPostHandlerImpl();
        sampleSocialData = getSampleSocialData('1');
    }

    static testMethod void verifyNewRecordCreation() {
        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to

```

```

the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchSocialPostRecord() {
        SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
        insert existingPost;

        SocialPost post = getSocialPost(sampleSocialData);
        post.R6PostId = existingPost.R6PostId;
        SocialPersona persona = getSocialPersona(sampleSocialData);

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        System.assertEquals(1, [SELECT Id FROM SocialPost].size(), 'There should be only
1 post');
```

```

    }

    static testMethod void matchSocialPersonaRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
        insert existingContact;
        SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
        existingPersona.ParentId = existingContact.Id;
        insert existingPersona;

        SocialPost post = getSocialPost(sampleSocialData);
        SocialPersona persona = getSocialPersona(sampleSocialData);
        persona.ExternalId = existingPersona.ExternalId;

        test.startTest();
        handler.handleInboundSocialPost(post, persona, sampleSocialData);
        test.stopTest();

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost];

        SocialPersona createdPersona = [SELECT Id, ParentId FROM SocialPersona];
        Contact createdContact = [SELECT Id FROM Contact];
        Case createdCase = [SELECT Id, ContactId FROM Case];

        System.assertEquals(createdPost.PersonaId, createdPersona.Id, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(createdPost.WhoId, createdPersona.ParentId, 'Post is not linked
to the Contact');
```

```

        System.assertEquals(createdPost.ParentId, createdCase.Id, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(createdCase.ContactId, createdContact.Id, 'Contact is not
linked to the Case.');
```

```

    }

    static testMethod void matchCaseRecord() {
        Contact existingContact = new Contact(LastName = 'LastName');
```

```

insert existingContact;
SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case');

insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();

SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

}

static testMethod void reopenClosedCase() {
Contact existingContact = new Contact(LastName = 'LastName');
insert existingContact;
SocialPersona existingPersona = getSocialPersona(getSampleSocialData('2'));
existingPersona.ParentId = existingContact.Id;
insert existingPersona;
Case existingCase = new Case(ContactId = existingContact.Id, Subject = 'Test Case',
Status = 'Closed');
insert existingCase;
SocialPost existingPost = getSocialPost(getSampleSocialData('2'));
existingPost.ParentId = existingCase.Id;
existingPost.WhoId = existingContact.Id;
existingPost.PersonaId = existingPersona.Id;
insert existingPost;

SocialPost post = getSocialPost(sampleSocialData);
post.responseContextExternalId = existingPost.ExternalPostId;

test.startTest();
handler.handleInboundSocialPost(post, existingPersona, sampleSocialData);
test.stopTest();
}

```

```

        SocialPost createdPost = [SELECT Id, PersonaId, ParentId, WhoId FROM SocialPost
WHERE R6PostId = :post.R6PostId];
        System.assertEquals(existingPersona.Id, createdPost.PersonaId, 'Post is not linked
to the Persona.');
```

```

        System.assertEquals(existingContact.Id, createdPost.WhoId, 'Post is not linked to
the Contact');
```

```

        System.assertEquals(existingCase.Id, createdPost.ParentId, 'Post is not linked to
the Case.');
```

```

        System.assertEquals(1, [SELECT Id FROM Case].size(), 'There should only be 1
Case.');
```

```

        System.assertEquals(false, [SELECT Id, IsClosed FROM Case WHERE Id =
:existingCase.Id].IsClosed, 'Case should be open.');
```

```

    }

    static SocialPost getSocialPost(Map<String, Object> socialData) {
        SocialPost post = new SocialPost();
        post.Name = String.valueOf(socialData.get('source'));
        post.Content = String.valueOf(socialData.get('content'));
        post.Posted = Date.valueOf(String.valueOf(socialData.get('postDate')));
        post.PostUrl = String.valueOf(socialData.get('postUrl'));
        post.Provider = String.valueOf(socialData.get('mediaProvider'));
        post.MessageType = String.valueOf(socialData.get('messageType'));
        post.ExternalPostId = String.valueOf(socialData.get('externalPostId'));
        post.R6PostId = String.valueOf(socialData.get('r6PostId'));
        return post;
    }

    static SocialPersona getSocialPersona(Map<String, Object> socialData) {
        SocialPersona persona = new SocialPersona();
        persona.Name = String.valueOf(socialData.get('author'));
        persona.RealName = String.valueOf(socialData.get('realName'));
        persona.Provider = String.valueOf(socialData.get('mediaProvider'));
        persona.MediaProvider = String.valueOf(socialData.get('mediaProvider'));
        persona.ExternalId = String.valueOf(socialData.get('externalUserId'));
        return persona;
    }

    static Map<String, Object> getSampleSocialData(String suffix) {
        Map<String, Object> socialData = new Map<String, Object>();
        socialData.put('r6PostId', 'R6PostId' + suffix);
        socialData.put('r6SourceId', 'R6SourceId' + suffix);
        socialData.put('postLabels', null);
        socialData.put('externalPostId', 'ExternalPostId' + suffix);
        socialData.put('content', 'Content' + suffix);
        socialData.put('postDate', '2015-01-12T12:12:12Z');
        socialData.put('mediaType', 'Twitter');
        socialData.put('author', 'Author');
        socialData.put('skipCreateCase', false);
        socialData.put('mediaProvider', 'TWITTER');
        socialData.put('externalUserId', 'ExternalUserId');
        socialData.put('postUrl', 'PostUrl' + suffix);
        socialData.put('messageType', 'Tweet');
        socialData.put('source', 'Source' + suffix);
        socialData.put('replyToExternalPostId', null);
    }

```

```

        socialData.put('realName', 'Real Name');
        return socialData;
    }
}

```

Default Apex Class for Spring '15 and Summer '15

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    final static Integer CONTENT_MAX_LENGTH = 32000;

    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if ((post.Content != null) && (post.Content.length() > CONTENT_MAX_LENGTH)) {
            post.Content = post.Content.abbreviate(CONTENT_MAX_LENGTH);
        }

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);

        upsert post;

        return result;
    }

    private void handleExistingPost(SocialPost post, SocialPersona persona) {
        update post;
        if (persona.id != null)
            updatePersona(persona);
    }

    private void setReplyTo(SocialPost post, SocialPersona persona) {

```

```

        SocialPost replyTo = findReplyTo(post, persona);
        if(replyTo.id != null) {
            post.replyToId = replyTo.id;
            post.replyTo = replyTo;
        }
    }

    private SocialPersona buildPersona(SocialPersona persona) {
        if (persona.Id == null)
            createPersona(persona);
        else
            updatePersona(persona);
        return persona;
    }

private void updatePersona(SocialPersona persona) {
    try {
        update persona;
    }catch(Exception e) {
        System.debug('Error updating social persona: ' + e.getMessage());
    }
}

    private Case buildParentCase(SocialPost post, SocialPersona persona,
    Map<String, Object> rawData){
        Case parentCase = findParentCase(post, persona);
        if (caseShouldBeReopened(parentCase))
            reopenCase(parentCase);
        else if(! hasSkipCreateCaseIndicator(rawData) && (parentCase.id == null ||
parentCase.isClosed))
            parentCase = createCase(post, persona);
        return parentCase;
    }

    private boolean caseShouldBeReopened(Case c){
        return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
    }

    private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
    Case parentCase) {
        if (persona.Id != null)
            postToUpdate.PersonaId = persona.Id;
        if(parentCase.id != null)
            postToUpdate.ParentId = parentCase.Id;
    }

    private Case createCase(SocialPost post, SocialPersona persona) {
        Case newCase = new Case(subject = post.Name);
        if (persona != null && persona.ParentId != null) {
            if (persona.ParentId.getSObjectType() == Contact.sObjectType)
                newCase.ContactId = persona.ParentId;
        }
    }

```

```

        if (post != null && post.Provider != null) {
            newCase.Origin = post.Provider;
        }
        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = new Case();
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id))
            parentCase = findParentCaseFromPostReply(post);
        else if((post.messageType == 'Direct' || post.messageType == 'Private') &&
String.isNotBlank(post.Recipient))
            parentCase = findParentCaseFromRecipient(post, persona);
        return parentCase;
    }

    private Case findParentCaseFromPostReply(SocialPost post){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE Id =
:post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private Case findParentCaseFromRecipient(SocialPost post, SocialPersona persona){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE id =
:findReplyToBasedOnRecipientsLastPostToSender(post, persona).parentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null) return;

        performR6PostIdCheck(post);

        if (post.Id == null){
            performExternalPostIdCheck(post);
        }
    }

    private void performR6PostIdCheck(SocialPost post){
        if(post.R6PostId == null) return;
    }

```

```

    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId = :post.R6PostId
LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private void performExternalPostIdCheck(SocialPost post) {
    if (post.provider == 'Facebook' && post.messageType == 'Private') return;
    if (post.provider == null || post.externalPostId == null) return;
    List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE ExternalPostId =
:post.ExternalPostId AND Provider = :post.provider LIMIT 1];
    if (!postList.isEmpty()) {
        post.Id = postList[0].Id;
    }
}

private SocialPost findReplyTo(SocialPost post, SocialPersona persona) {
    if(post.replyToId != null && post.replyTo == null)
        return findReplyToBasedOnReplyToId(post);
    if(post.responseContextExternalId != null)
        return findReplyToBasedOnExternalPostIdAndProvider(post,
post.responseContextExternalId);
    return new SocialPost();
}

private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post, String
externalPostId){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :externalPostId LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

private SocialPost findReplyToBasedOnRecipientsLastPostToSender(SocialPost post,
SocialPersona persona){
    List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE provider = :post.provider AND OutboundSocialAccount.ProviderUserId = :post.Recipient
AND ReplyTo.Persona.id = :persona.id ORDER BY CreatedDate DESC LIMIT 1];
    if(posts.isEmpty())
        return new SocialPost();
    return posts[0];
}

```

```

private void matchPersona(SocialPersona persona) {
    if (persona != null) {
        List<SocialPersona> personaList = new List<SocialPersona>();
        if(persona.Provider != 'Other' && String.isNotBlank(persona.ExternalId)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                Provider = :persona.Provider AND
                ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.ExternalId)
&& String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                MediaProvider = :persona.MediaProvider AND
                ExternalId = :persona.ExternalId LIMIT 1];
        } else if(persona.Provider == 'Other' && String.isNotBlank(persona.Name) &&
String.isNotBlank(persona.MediaProvider)) {
            personaList = [SELECT Id, ParentId FROM SocialPersona WHERE
                MediaProvider = :persona.MediaProvider AND
                Name = :persona.Name LIMIT 1];
        }

        if (!personaList.isEmpty()) {
            persona.Id = personaList[0].Id;
            persona.ParentId = personaList[0].ParentId;
        }
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || String.isNotBlank(persona.Id) ||
!isThereEnoughInformationToCreatePersona(persona))
        return;

    SObject parent = createPersonaParent(persona);
    persona.ParentId = parent.Id;
    insert persona;
}

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona) {
    return String.isNotBlank(persona.Name) &&
        String.isNotBlank(persona.Provider) &&
        String.isNotBlank(persona.MediaProvider);
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

global virtual SObject createPersonaParent(SocialPersona persona) {
    String name = persona.Name.trim();
    if (String.isNotBlank(persona.RealName))
        name = persona.RealName.trim();
}

```

```

String firstName = '';
String lastName = name;
if (name.contains(' ')) {
    firstName = name.substringBeforeLast(' ');
    lastName = name.substringAfterLast(' ');
}

firstName = firstName.abbreviate(40);
lastName = lastName.abbreviate(80);

Contact contact = new Contact(LastName = lastName, FirstName = firstName);
String defaultAccountId = getDefaultAccountId();
if (defaultAccountId != null)
    contact.AccountId = defaultAccountId;
insert contact;
return contact;
}
}

```

Default Apex Class for Summer '14 and Winter '14

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
        Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
        result.setSuccess(true);
        matchPost(post);
        matchPersona(persona);

        if (post.Id != null) {
            handleExistingPost(post, persona);
            return result;
        }

        setReplyTo(post, persona, rawData);
        buildPersona(persona);
        Case parentCase = buildParentCase(post, persona, rawData);
        setRelationshipsOnPost(post, persona, parentCase);
        upsert post;

        return result;
    }
}

```

```

private void handleExistingPost(SocialPost post, SocialPersona persona) {
    update post;
    if (persona.id != null)
        update persona;
}

private void setReplyTo(SocialPost post, SocialPersona persona, Map<String, Object>
rawData) {
    SocialPost replyTo = findReplyTo(post, persona, rawData);
    if(replyTo.id != null) {
        post.replyToId = replyTo.id;
        post.replyTo = replyTo;
    }
}

private SocialPersona buildPersona(SocialPersona persona) {
    if (persona.Id == null)
        createPersona(persona);
    else
        update persona;
    return persona;
}

private Case buildParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData){
    Case parentCase = findParentCase(post, persona);
    if (caseShouldBeReopened(parentCase))
        reopenCase(parentCase);
    else if(! hasSkipCreateCaseIndicator(rawData) && (parentCase.id == null ||
parentCase.isClosed))
        parentCase = createCase(post, persona);
    return parentCase;
}

private boolean caseShouldBeReopened(Case c){
    return c.id != null && c.isClosed && System.now() <
c.closedDate.addDays(getMaxNumberOfDaysClosedToReopenCase());
}

private void setRelationshipsOnPost(SocialPost postToUpdate, SocialPersona persona,
Case parentCase) {
    if (persona.Id != null)
        postToUpdate.PersonaId = persona.Id;
    if(parentCase.id != null)
        postToUpdate.ParentId = parentCase.Id;
}

private Case createCase(SocialPost post, SocialPersona persona) {
    Case newCase = new Case(subject = post.Name);
    if (persona != null && persona.ParentId != null) {
        if (persona.ParentId.getSObjectType() == Contact.sObjectType)
            newCase.ContactId = persona.ParentId;
    }
}

```

```

        insert newCase;
        return newCase;
    }

    private Case findParentCase(SocialPost post, SocialPersona persona) {
        Case parentCase = new Case();
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id))
            parentCase = findParentCaseFromPostReply(post);
        else if((post.messageType == 'Direct' || post.messageType == 'Private') &&
post.Recipient != null && String.isNotBlank(post.Recipient))
            parentCase = findParentCaseFromRecipient(post, persona);
        return parentCase;
    }

    private Case findParentCaseFromPostReply(SocialPost post){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE Id =
:post.ReplyTo.ParentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private Case findParentCaseFromRecipient(SocialPost post, SocialPersona persona){
        List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE id =
:findReplyToBasedOnRecipientsLastPostToSender(post, persona).parentId LIMIT 1];
        if(!cases.isEmpty())
            return cases[0];
        return new Case();
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null || post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty())
            post.Id = postList[0].Id;
    }

    private SocialPost findReplyTo(SocialPost post, SocialPersona persona, Map<String,
Object> rawData) {
        if(post.replyToId != null && post.replyTo == null)
            return findReplyToBasedOnReplyToId(post);
        if(rawData.get('replyToExternalPostId') != null &&
String.isNotBlank(String.valueOf(rawData.get('replyToExternalPostId'))))
            return findReplyToBasedOnExternalPostIdAndProvider(post,
String.valueOf(rawData.get('replyToExternalPostId')));
    }

```

```

        return new SocialPost();
    }

    private SocialPost findReplyToBasedOnReplyToId(SocialPost post){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE id = :post.replyToId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnExternalPostIdAndProvider(SocialPost post, String
externalPostId){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE Provider = :post.provider AND ExternalPostId = :externalPostId LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private SocialPost findReplyToBasedOnRecipientsLastPostToSender(SocialPost post,
SocialPersona persona){
        List<SocialPost> posts = [SELECT Id, ParentId, IsOutbound, PersonaId FROM SocialPost
WHERE provider = :post.provider AND OutboundSocialAccount.ProviderUserId = :post.Recipient
AND ReplyTo.Persona.id = :persona.id ORDER BY CreatedDate DESC LIMIT 1];
        if(posts.isEmpty())
            return new SocialPost();
        return posts[0];
    }

    private void matchPersona(SocialPersona persona) {
        if (persona != null && persona.ExternalId != null &&
String.isNotBlank(persona.ExternalId)) {
            List<SocialPersona> personaList = [SELECT Id, ParentId FROM SocialPersona WHERE

                Provider = :persona.Provider AND
                ExternalId = :persona.ExternalId LIMIT 1];
            if ( !personaList.isEmpty()) {
                persona.Id = personaList[0].Id;
                persona.ParentId = personaList[0].ParentId;
            }
        }
    }

    private void createPersona(SocialPersona persona) {
        if (persona == null || (persona.Id != null && String.isNotBlank(persona.Id)) ||
!isThereEnoughInformationToCreatePersona(persona))
            return;

        SObject parent = createPersonaParent(persona);
        persona.ParentId = parent.Id;
        insert persona;
    }

```

```

private boolean isThereEnoughInformationToCreatePersona(SocialPersona persona){
    return persona.ExternalId != null && String.isNotBlank(persona.ExternalId) &&
        persona.Name != null && String.isNotBlank(persona.Name) &&
        persona.Provider != null && String.isNotBlank(persona.Provider) &&
        persona.provider != 'Other';
}

private boolean hasSkipCreateCaseIndicator(Map<String, Object> rawData) {
    Object skipCreateCase = rawData.get('skipCreateCase');
    return skipCreateCase != null &&
'true'.equalsIgnoreCase(String.valueOf(skipCreateCase));
}

global virtual SObject createPersonaParent(SocialPersona persona) {
    String name = persona.Name;
    if (persona.RealName != null && String.isNotBlank(persona.RealName))
        name = persona.RealName;

    String firstName = '';
    String lastName = 'unknown';
    if (name != null && String.isNotBlank(name)) {
        firstName = name.substringBeforeLast(' ');
        lastName = name.substringAfterLast(' ');
        if (lastName == null || String.isBlank(lastName))
            lastName = firstName;
    }

    Contact contact = new Contact(LastName = lastName, FirstName = firstName);
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null)
        contact.AccountId = defaultAccountId;
    insert contact;
    return contact;
}
}

```

Default Apex Class for Winter '13 and Spring '14

```

global virtual class InboundSocialPostHandlerImpl implements Social.InboundSocialPostHandler
{
    // Reopen case if it has not been closed for more than this number
    global virtual Integer getMaxNumberOfDaysClosedToReopenCase() {
        return 5;
    }

    global virtual Boolean usePersonAccount() {
        return false;
    }

    global virtual String getDefaultAccountId() {
        return null;
    }
}

```

```

    global Social.InboundSocialPostResult handleInboundSocialPost(SocialPost post,
SocialPersona persona, Map<String, Object> rawData) {
    Social.InboundSocialPostResult result = new Social.InboundSocialPostResult();
    result.setSuccess(true);
    matchPost(post);
    matchPersona(persona);

    if (post.Id != null) {
        update post;
        if (persona.id != null) {
            update persona;
        }
        return result;
    }

    findReplyTo(post, rawData);

    Case parentCase = null;
    if (persona.Id == null) {
        createPersona(persona);
        post.PersonaId = persona.Id;
    }
    else {
        update persona;
        post.PersonaId = persona.Id;
        parentCase = findParentCase(post, persona, rawData);
    }

    if (parentCase == null) {
        parentCase = createCase(post, persona);
    }

    post.ParentId = parentCase.Id;

    insert post;

    return result;
}

private Case createCase(SocialPost post, SocialPersona persona) {
    Case newCase = new Case(
        subject = post.Name
    );
    if (persona != null && persona.ParentId != null) {
        if (persona.ParentId.getSObjectType() == Contact.sObjectType) {
            newCase.ContactId = persona.ParentId;
        }
        else if (persona.ParentId.getSObjectType() == Account.sObjectType) {
            newCase.AccountId = persona.ParentId;
        }
    }
    insert newCase;
    return newCase;
}

```

```

    private Case findParentCase(SocialPost post, SocialPersona persona, Map<String, Object>
rawData) {
        SocialPost replyToPost = null;
        if (post.ReplyTo != null && (post.ReplyTo.IsOutbound || post.ReplyTo.PersonaId ==
persona.Id)) {
            replyToPost = post.ReplyTo;
        }
        else if (post.MessageType == 'Direct' && String.isNotBlank(post.Recipient)) {
            // find the latest outbound post that the DM is responding to
            List<SocialPost> posts = [SELECT Id, ParentId FROM SocialPost WHERE
OutboundSocialAccount.ProviderUserId = :post.Recipient AND ReplyTo.Persona.Id = :persona.Id
ORDER BY CreatedDate DESC LIMIT 1];
            if (!posts.isEmpty()) {
                replyToPost = posts[0];
            }
        }

        if (replyToPost != null) {
            List<Case> cases = [SELECT Id, IsClosed, Status, ClosedDate FROM Case WHERE
Id = :replyToPost.ParentId];
            if (!cases.isEmpty()) {
                if (!cases[0].IsClosed) return cases[0];
                if (cases[0].ClosedDate >
System.now().addDays(-getMaxNumberOfDaysClosedToReopenCase())) {
                    reopenCase(cases[0]);
                    return cases[0];
                }
            }
        }

        return null;
    }

    private void reopenCase(Case parentCase) {
        SObject[] status = [SELECT MasterLabel FROM CaseStatus WHERE IsClosed = false AND
IsDefault = true];
        parentCase.Status = ((CaseStatus)status[0]).MasterLabel;
        update parentCase;
    }

    private void matchPost(SocialPost post) {
        if (post.Id != null || post.R6PostId == null) return;
        List<SocialPost> postList = [SELECT Id FROM SocialPost WHERE R6PostId =
:post.R6PostId LIMIT 1];
        if (!postList.isEmpty()) {
            post.Id = postList[0].Id;
        }
    }

    private void findReplyTo(SocialPost post, Map<String, Object> rawData) {
        String replyToId = (String)rawData.get('replyToExternalPostId');
        if (String.isBlank(replyToId)) return;
        List<SocialPost> postList = [SELECT Id, ParentId, IsOutbound, PersonaId FROM

```

```

SocialPost WHERE ExternalPostId = :replyToId LIMIT 1];
    if (!postList.isEmpty()) {
        post.ReplyToId = postList[0].id;
        post.ReplyTo = postList[0];
    }
}

private void matchPersona(SocialPersona persona) {
    if (persona != null && String.isNotBlank(persona.ExternalId)) {
        List<SocialPersona> personaList = [SELECT Id, ParentId FROM SocialPersona WHERE

            ((Provider != 'Other' AND Provider = :persona.Provider) OR
             (Provider = 'Other' AND MediaProvider != null AND MediaProvider =
:persona.MediaProvider)) AND
            ((ExternalId != null AND ExternalId = :persona.ExternalId) OR
             (ExternalId = null AND Name = :persona.Name)) LIMIT 1];
        if ( !personaList.isEmpty()) {
            persona.Id = personaList[0].Id;
            persona.ParentId = personaList[0].ParentId;
        }
    }
}

private void createPersona(SocialPersona persona) {
    if (persona == null || persona.Id != null || String.isBlank(persona.ExternalId)
|| String.isBlank(persona.Name) ||
        String.isBlank(persona.Provider)) return;

    if (isPersonaAccountEnabled()){
        Account account = createPersonAccount(persona);
        persona.ParentId = account.Id;
    }
    else {
        Contact contact = createContact(persona);
        persona.ParentId = contact.Id;
    }
    insert persona;
}

private Boolean isPersonaAccountEnabled() {
    if (!usePersonAccount()) return false;
    Map<String, Object> accountFields = Schema.SObjectType.Account.fields.getMap();
    return accountFields.containsKey('IsPersonAccount');
}

private Account createPersonAccount(SocialPersona persona) {
    Account account = new Account(
        Name = persona.Name
    );
    insert account;
    return account;
}

```

```
private Contact createContact(SocialPersona persona) {
    String name = persona.RealName;
    if (String.isBlank(name)) {
        name = persona.Name;
    }

    String firstName = '';
    String lastName = 'unknown';
    if (!String.isBlank(name)) {
        firstName = name.substringBeforeLast(' ');
        lastName = name.substringAfterLast(' ');
        if (String.isBlank(lastName)) {
            lastName = firstName;
        }
    }

    Contact contact = new Contact(
        LastName = lastName,
        FirstName = firstName
    );
    String defaultAccountId = getDefaultAccountId();
    if (defaultAccountId != null) {
        contact.AccountId = defaultAccountId;
    }
    insert contact;
    return contact;
}
```

Engage and Respond Using Social Customer Service

Use social customer service to engage your customer on social media.

IN THIS SECTION:

[Social Action Tips](#)

Use the social action on the case or lead feed to respond to social posts. Choose a message type when replying, for example, reply with a direct message on Twitter or a public tweet.

[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 a message type when replying, for example, reply with a direct message on Twitter or a public tweet.

We recommend that the layout of the social action includes the following fields.

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, post attachments, 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 the Salesforce app, agents can see and reply to social content from mobile devices.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To send and receive social media posts or messages:

- Social Objects
AND
Social Publisher
AND
Case Feed enabled
AND
Social account

- 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:

[Social Customer Service](#)

[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](#) on page 462. To enable moderation through Social Studio see, [Enable Moderation for Social Customer Service](#) on page 470.

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.

EDITIONS

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

USER PERMISSIONS

To install and deploy Social Studio for Salesforce:

- Customize Application

-  **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](#)
- [Social Customer Service](#)
- [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

Social Customer Service is available in Salesforce Classic and Lightning Experience. Service Setup is available in Lightning Experience.

Social Customer Service is available in all editions with the Service Cloud.

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](#)

[Social Customer Service](#)

[Complete Guide to Social Customer Service](#)

Collaborate in a Customer Community

Create communities to provide an online support channel for your customers to collaborate—allowing them to resolve their inquiries without contacting a customer representative.

To set up a new community, head over to Service Setup. From the Service Setup home page, click **Get Started** under the Lightning Communities Setup tile. The setup flow builds your community using the Customer Service (Napili) template. In the setup flow, you name your community, create the URL, add navigational and featured topics, and assign articles to topics. At the end of the flow, you can opt to set up other features or access helpful setup topics. When you're done, you can preview your community with co-workers before it goes live.

 **Note:** We recommend setting up Lightning Knowledge before going through the Lightning Communities setup flow. If Knowledge isn't enabled before starting the Lightning Communities setup, Data Categories aren't created during the Communities setup flow.

IN THIS SECTION:

[Set Up Lightning Communities with a Guided Setup Flow](#)

Create a Lightning Community in minutes using a quick guided setup flow. Build a branded community on a Customer Service (Napili) template with your own domain, path, and name. Optionally, include a Web-to-Case form to let guests create cases.

SEE ALSO:

[Set Up and Configure Features in the Lightning Service Console](#)

[Set Up and Manage Salesforce Communities](#)

[Question-to-Case](#)

Set Up Lightning Communities with a Guided Setup Flow

Create a Lightning Community in minutes using a quick guided setup flow. Build a branded community on a Customer Service (Napili) template with your own domain, path, and name. Optionally, include a Web-to-Case form to let guests create cases.

The Lightning Community setup flow is the fastest and easiest way to get your community up and running. In this flow, your community uses a Customer Service (Napili) template. The template lets customers post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases.

 **Note:** If you set up Lightning Knowledge before your community, you may have added featured topics. If so, you also had the opportunity to map data categories to those topics. Any article mapped to a data category is tagged with the corresponding topic. For example,

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

if the article is marked public, it shows up underneath the corresponding featured topic. Now, whenever you tag articles, they're available in the community.

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking  and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Creating a domain
- Giving your community a name and path
- Adding branding images
- Selecting data categories for your content
- Creating a Web-to-Case contact form

If you switch on Publish my community after completing setup in the flow, you opt for immediate publication and your community is live. If you left it off, it's not live yet. You can publish from the Community Builder whenever you're ready.

We also turn on several things in the background during the setup flow.

Guest Profile Access

The flow enables guest profile access to Knowledge, Data Categories, Chatter, and Cases. These settings allow the guest user to fully interact with the community you created.

Web-to-Case and Quick Action Edit Capabilities

When you create a contact form, Web-to-Case and Quick Action edit capabilities are automatically enabled. This means that when you publish your community, guests can submit cases directly from your community.

Data Categories

If you selected Data Categories in the setup flow, Knowledge topics are auto-enabled and the data categories are mapped to those topics, giving community members read-only access to those articles.

Topics associated with those Data Categories show up in the community after completing the flow. Furthermore, any new article assigned to a Data Category will automatically be assigned to the corresponding topic.

IN THIS SECTION:

[Lightning Communities Setup Flow: What's Next?](#)

Learn where you can customize and view what you set up during the Lightning Communities setup flow.

SEE ALSO:

[Get Started with Service Setup](#)

Lightning Communities Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Lightning Communities setup flow.

After completing the setup flow, there are many things you can do to build out and enhance your community.

Watch a Demo: [Lightning Communities: What's Next? \(English Only\)](#)

To look at your shiny new community, go to Setup and enter *Communities* in the Quick Find box. Then, select **Communities**. From here, you can view your community or make some tweaks in the Community Builder.

To provide more customer service features to your guests, head over to the Community Builder. You can further customize your branding or add Service Cloud components, like Snap-ins Chat. Then if you haven't already, publish your community for the world to see.

Salesforce Knowledge

Give your website visitors, clients, partners, and service agents the ultimate support tool. Salesforce Knowledge lets you create and manage a knowledge base with your company information and securely share it when and where it's needed.

Your Salesforce Knowledge base is built from knowledge articles, which are documents of information. Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions, like how much storage your product supports.

Experienced service agents and internal writers write the articles. The articles are then published to a range of channels: Internal App, customer and partner communities, or public websites. Where and what information is published is based on the article layout profile and the field level security.

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Lightning Knowledge, which is Generally Available, is recommended for orgs new to Knowledge, or for existing orgs that can easily consolidate to one article type.

 **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple articles types require data migration to consolidate article types before enabling Lightning Knowledge.

Important: After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

IN THIS SECTION:

[Salesforce Knowledge Documentation Overview](#)

Find the information you need about Salesforce Knowledge.

[Plan Your Knowledge Base](#)

It's important that you consider your individual company's needs while you develop a strategy for capturing and publishing your support team's expertise. With a robust knowledge base, customers receive service faster or even solve their own problems themselves.

[Lightning Knowledge Migration Tool \(Beta\)](#)

Use the Lightning Knowledge Migration Tool to move your Classic knowledge base into Lightning Knowledge. The Lightning Knowledge Migration Tool can be used for Multiple Article Type orgs and Single Article Type orgs. Use the appropriate guide for your org.

[Build Your Knowledge Base in Lightning Experience](#)

Lightning Knowledge gives you a high-powered yet streamlined way to manage your knowledge base. With Lightning Knowledge, you get the benefits of standard objects that work just like other objects in Salesforce. Lightning Knowledge is best for orgs new to Knowledge or for existing orgs that can easily consolidate to one article type.

[Build Your Knowledge Base in Salesforce Classic](#)

After you've assigned Knowledge User licenses (including to yourself), you're ready to build your Knowledge base.

[Set Up Categories for Articles, Answers, and Ideas](#)

Data categories are used in Salesforce to organize and control access to groups of information. Data categories are used in Salesforce Knowledge, Ideas, Answers, and Chatter Answers.

[Work with Salesforce Knowledge](#)

Create and manage your company information and securely share it when and where it is needed.

SEE ALSO:

[Complete Guide to Salesforce Knowledge](#)

Salesforce Knowledge Documentation Overview

Find the information you need about Salesforce Knowledge.

Overview of Salesforce Knowledge

- [Salesforce Knowledge](#)
- [Plan Your Knowledge Base](#)
- [Work with Articles and Translations](#)
- [Salesforce Knowledge Guide](#)

Classic Knowledge

Set up Classic Knowledge

- [Build Your Knowledge Base in Salesforce Classic](#)
- [Knowledge Article Types](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Classic Knowledge User Access](#)
- [Workflow and Approvals for Articles](#)

Use Your Salesforce Knowledge Base in Salesforce Classic

- [Search Articles and External Sources on the Knowledge Tab](#)
 - [Find Knowledge Articles in a Salesforce Console in Salesforce Classic](#)
 - [How Does Search Work?](#)
 - [Articles or Knowledge Tab](#)
 - For searching and viewing Salesforce Knowledge Articles on your Android device, see [Access Salesforce Knowledge Articles with Salesforce for Android \(Beta\)](#) and [Salesforce App Differences from the Full Salesforce Site](#)
- [Create and Edit Articles](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

- [Publish Articles and Translations](#)
- [Report on Salesforce Knowledge Articles](#)

Translate Salesforce Knowledge Articles

- [Support a Multilingual Knowledge Base](#)
- [Translate Articles in Classic Knowledge](#)
- [Export Articles for Translation](#)
- [Import Translated Articles](#)

Lightning Knowledge

Set up Lightning Knowledge

- [Enable Lightning Knowledge](#)
- [Set Up and Configure Lightning Knowledge](#)
- [Create Lightning Knowledge Record Types](#)
- [Create Lightning Knowledge Home](#) on page 592
- [Set Access for Lightning Knowledge](#) on page 593

Use Your Salesforce Knowledge Base in Lightning Experience

- [Authoring Actions in Lightning Knowledge](#) on page 599
- [Search Articles in the Main Search Box and the Knowledge Component](#) on page 598
- [Use the Knowledge Component in the Lightning Service Console](#) on page 600

Trailhead

- [Knowledge Basics](#)

Define Data Categories for Your Salesforce Knowledge Articles

- [Data Categories in Salesforce.com](#)
- [Create and Modify Category Groups](#)
- [Add Data Categories to Category Groups](#)

Share Your Salesforce Knowledge Base

- [Find, Attach, and Email Articles with the Case Feed Articles Tool](#) (Classic)
- [Enable Salesforce Knowledge in Your Community](#) (Classic)
- [Use Knowledge with Live Agent](#) (Classic)
- If you want to let visitors search and view Salesforce Knowledge articles on your public site, set up a [Customer Service \(Napili\) Template](#). Napili is a powerful, responsive self-service template that also lets visitors post questions to the community, collaborate, and contact support agents by creating cases.

Knowledge and the Salesforce App

- [What's Available in Each Version of the Salesforce App](#)

- [Customer Service Features: What's Not Available in the Salesforce App](#)

Develop with Salesforce Knowledge

- The [Salesforce Knowledge Developers Guide](#) has Salesforce Knowledge specific development information along with tutorials and examples.
- The [REST API Developer Guide](#) has information on supporting articles with the REST API.
- The [SOAP API Developer Guide](#) has information on the Salesforce Knowledge API:
 - Guidelines
 - Objects
 - Calls
- The [Metadata API Developers Guide](#) has information on Salesforce Knowledge Metadata API objects.
- The [Visualforce Developers Guide](#) has information on Salesforce Knowledge Visualforce components.
- The [Lightning Platform Apex Code Developers Guide](#) has information on the Apex KnowledgeArticleVersionStandardController Class.

Plan Your Knowledge Base

It's important that you consider your individual company's needs while you develop a strategy for capturing and publishing your support team's expertise. With a robust knowledge base, customers receive service faster or even solve their own problems themselves.

Setting up Salesforce Knowledge is a "choose your own adventure" procedure. There are many features and options and it's up to you to decide which ones are right for your enterprise.

Consideration	Further Information
What information do you need to publish?	Articles
Who can provide the information?	Knowledge User License , User Setup
Who can approve and manage the information?	Knowledge Management , Validation Rules
Do you need workflow or approval processes to manage article creation and publication?	Workflow and Approvals for Articles
Do you have an existing Knowledge base or documentation that you need to import?	Import Existing Information into Salesforce Knowledge
Who needs to read what information and where?	Classic Knowledge User Access , Create Public Groups for Knowledge , Assign Article Actions to Public Groups
Do you need to categorize your information?	Data Categories in Salesforce.com
Who has access to which categories?	Data Category Visibility
Are you supporting more than one language?	Support a Multilingual Knowledge Base
Do you need agents to search for articles while working on a case?	Attach PDF versions of articles to case emails . View a list of suggested articles based on

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Consideration	Further Information
	case information. , Set Up the Knowledge One Widget
Do you need agents to follow articles in Chatter?	Feed Tracking
Do you need to share your knowledge base externally?	Public Knowledge for Mobile, Web, and Facebook
Do you need to enhance searchability?	Improve the Article Search Experience
Do you need guidelines, resources, and current discussions on the evolving world of knowledge base orientated service?	Salesforce Knowledge is "KCS Verified" by the Consortium for Service Innovation, which recognizes best practices in customer support methodologies. By implementing Knowledge-Centered Support (KCS) features, you can create more efficient collaboration within your team and provide pertinent and accurate information to your customers.

Consider the following tips when planning and using Salesforce Knowledge:

- Create [synonym groups](#) in Salesforce Knowledge. Synonyms are words or phrases that are treated as equivalent in article searches, letting you optimize search results.
- Before setting up data categories, carefully plan your category groups and their hierarchies. Also, consider how your category hierarchy maps to your role hierarchy. For more information, see [Data Category Visibility](#).
- Create [custom reports](#) on your Salesforce Knowledge data. You can also install the *Knowledge Base Dashboards and Reports* app from the AppExchange to receive over two dozen helpful reports.
- Multiple agents can edit the same article at the same time. If that occurs, your changes can be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to edit only the articles they're assigned.
- Review your usage regularly to avoid storage shortages: from Setup, enter *Storage Usage* in the **Quick Find** box, then select **Storage Usage**.
- Public knowledge base users cannot rate articles.
- The [File custom field type](#) allows agents to attach documents to articles.
- You will lose your data if you convert a custom field on an article type into any other field type. Do not convert custom fields unless no data exists for the field.
- When renaming Salesforce Knowledge labels note that standard field names, like title and type, are fixed. These fields do not change the labels on the article create and edit pages. If the organization is set to another language, these fields remain in the fixed label for that language.
- The Salesforce Knowledge search engine supports lemmatization, which is the process of reducing a word to its root form. With lemmatization, a search can match expanded forms of a search term. For example, a search for *running* matches items that contain *run*, *running*, and *ran*.
- Make sure that you have a clear understanding of the type of articles your organization needs, and how agents interact with these article types. This determines the article type permissions and article actions that you need to assign to Salesforce Knowledge users, which you can then use to create the set of profiles or permission sets required by your organization. For more information, see [Classic Knowledge User Access](#) on page 643.
- Determine if you need to create workflow rules for some of your article types. For example, you can create a rule that sends an email to an article manager when an agent creates an article upon closing a case.

- Determine if you need to create approval processes for some of your article types. For example, if you have a type of article that must have legal and management approval before it can be published externally, create an approval process for the article type.

SEE ALSO:

- [Build Your Knowledge Base in Salesforce Classic](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Lightning Knowledge Migration Tool (Beta)

Use the Lightning Knowledge Migration Tool to move your Classic knowledge base into Lightning Knowledge. The Lightning Knowledge Migration Tool can be used for Multiple Article Type orgs and Single Article Type orgs. Use the appropriate guide for your org.

As a beta feature, the Lightning Knowledge Migration Tool is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

Use the Lightning Knowledge Migration Tool to move your Classic knowledge base into Lightning Knowledge.

Introduction

Are you ready to migrate your knowledge base from Classic to Lightning Knowledge? Great! After some pre-planning on your part, the Lightning Knowledge Migration Tool does most of the heavy lifting for you. When you're done, all the content in your Classic knowledge base exists in Lightning Knowledge. Service agents can enjoy a more flexible and consistent UI experience. Also, you can adopt features and future enhancements that won't be available in Classic.

With the new model, your data is unified in one knowledge object which enables you to better leverage the power of the Salesforce platform. Lightning Knowledge has all articles consolidated in a single object and uses record types to distinguish different types of articles.

Making the move to Lightning Knowledge is a multi-phase process, with each step building on the success of the previous ones. To ensure a successful migration, read all of the Lightning Knowledge Migration Tool help topics beforehand. Here's an overview of the entire process:

1. Read *all* of the help topics.
2. Learn about the Lightning Knowledge Migration Tool.
3. Plan your migration.
4. Perform the migration from Classic to Lightning Knowledge **in your sandbox org.**
 - a. Set up and run the data migration.
 - b. Switch from Classic to Lightning Knowledge.
 - c. Validate the migration results.
 -  **Note:** Validation is only required for multiple article type orgs.
 - d. Accept the migration results.
 - e. Run through the post-migration checklist.

5. Perform the migration from Classic to Lightning Knowledge **in your production org**.

- a. Set up and run the data migration.
- b. Switch from Classic to Lightning Knowledge.
- c. Validate the migration results.

 **Note:** Validation is only required for multiple article type orgs.

- d. Accept the migration results.
- e. Run through the post-migration checklist.

6. Launch Lightning Knowledge.

These help topics step you through your Lightning Knowledge migration from migration setup through validation to a few post-migration Lightning configuration tips:

1. **[Learn About the Lightning Knowledge Migration Tool on page 562](#)**: Before planning your move to Lightning Knowledge, learn about the migration tool and the difference between Classic and Lightning Knowledge. Understand the limits of the migration tool.
2. **[Plan and Sandbox Test Your Migration on page 564](#)**: Review migration strategies and planning checklists. Learn about the importance of sandbox testing before making the move to Lightning Knowledge in your production org.
3. **[Perform the Migration: Multiple Article Type Orgs on page 568](#)**: For multiple article type orgs, this is the step-by-step guide to using the Lightning Knowledge Migration Tool in sandbox and production environments. After migration is complete, validate the results before accepting or undoing the migration. After accepting the migration, there's a bit more work. Review the Post-Migration Checklist before giving your team full access to Lightning Knowledge.
4. **[Perform the Migration: Single Article Type Orgs on page 575](#)** For single article type orgs, this is the step-by-step guide to using the Lightning Knowledge Migration Tool in sandbox and production environments. There is no validation step needed for single article type orgs. After running the migration, review the Post-Migration Checklist before giving your team full access to Lightning Knowledge.

 **Note:** The Lightning Knowledge Migration Tool is used for sandbox and production migrations. Perform the migration following the appropriate help topic, either for multiple or single article type orgs.

IN THIS SECTION:

[Learn About the Lightning Knowledge Migration Tool](#)

Before planning and performing the migration with the Lightning Knowledge Migration Tool, learn about the differences between Classic Knowledge and Lightning Knowledge. Understand the limits of the migration tool and Classic features that either aren't supported or work differently in Lightning Knowledge.

[Plan and Sandbox Test Your Migration](#)

If you were involved in building your Classic knowledge base, you know that planning is critical. In fact, planning is the most important part of migrating to Lightning Knowledge.

[Perform the Migration: Multiple Article Type Orgs](#)

You planned your migration. You went over the pre-migration checklist and you made all the prerequisite revisions to your Classic knowledge base. You're aware of the limitations. You're ready to go. Here's your step-by-step guide to using the Lightning Knowledge Migration Tool with multiple article type orgs.

[Perform the Migration: Single Article Type Orgs](#)

You planned your migration. You went over the pre-migration checklist and you made all the prerequisite revisions to your Classic knowledge base. You're aware of the limitations. You're ready to go. Here's your step-by-step guide to using the Lightning Knowledge Migration Tool with single article type orgs.

Learn About the Lightning Knowledge Migration Tool

Before planning and performing the migration with the Lightning Knowledge Migration Tool, learn about the differences between Classic Knowledge and Lightning Knowledge. Understand the limits of the migration tool and Classic features that either aren't supported or work differently in Lightning Knowledge.

Key things to note about the post-migration Lightning Knowledge data structure:

- **Record Types:**The migration tool maps Classic Knowledge article types to record types and consolidates fields in one Lightning Knowledge object.
- **Files:**Files from custom file fields in Classic Knowledge articles are moved to the standard files object. After migration, view and attach files in the files related list.
- **Permissions:**User profiles are granted new authoring permissions in User Profiles or Permissions sets and no longer use Article Actions with Public Groups.

 **Note:** Admins must manually assign permissions. Changing from Article Actions with Public Groups to using profile permissions or permission sets is not part of the migration tool.

Let's compare Classic Knowledge to Lightning Knowledge:

Table 14: Classic Knowledge Versus Lightning Knowledge

Features	Classic Knowledge	Lightning Knowledge
Data Model	Custom Article Types	Standard Record Types
Page Layouts	<ul style="list-style-type: none"> • Fields Only • Per Article Type and User Profile 	<ul style="list-style-type: none"> • Fields, Actions, and Related Lists • Per Record Type and User Profile
Record Home	Custom Record Home (static)	Standard Record Home (configurable with Page Layouts and App Builder)
Object Home	<ul style="list-style-type: none"> • Article Management Tabs • Knowledge One 	Unified Standard Object Home with Listviews
Access & Permissions	<ul style="list-style-type: none"> • CRUD • Profile perms • Page Layouts • Custom "Article Actions" per Public Group 	<ul style="list-style-type: none"> • Standard CRUD • Profile perms • Page Layouts
Authoring	Custom Article Management Tab	Standard Actions (admin can control in Page Layout)
Search	Custom Knowledge Search	Standard Search: Knowledge in Global Search
File Attachment	Custom File Fields (5 max)	<ul style="list-style-type: none"> • Standard Files Component • Related List
Approvals & Workflow	Per Article Type	<ul style="list-style-type: none"> • All Record Types

Features	Classic Knowledge	Lightning Knowledge
		<ul style="list-style-type: none"> Per Record Type
Validation Rules	Per Article Type	<ul style="list-style-type: none"> All Record Types Per Record Type

As part of the migration plan, we recommend that Knowledge admins become familiar with all the limitations. Before performing sandbox and production migrations, assess whether these items pertain to your org's implementation of Lightning Knowledge and prepare accordingly.

The following items *do not* migrate from Classic into Lightning Knowledge:

Table 15: Limitations in the Lightning Knowledge Migration Tool

Item	Description
Undeployed Article Types	Undeployed article types are removed during migration. If the total number of field with field tracking enabled across all source article types exceeds the limit (the default is 20, or 40 if the org uses an add-on license), then the migration does not start. Remove the tracking on some of them, to make sure the total is below the threshold and try migration again.
Automated Article Feed Posts	Article Feed Posts that show article changes (published, edited).
Soft Deleted Records	Soft-deleted records are not migrated from Classic.
Article Status	<p>The following are removed during migration:</p> <ul style="list-style-type: none"> Articles with a Scheduled for Publish status and a past due date. Articles with a Scheduled for Archive status and a past due date. <p>Publish scheduled articles and archive scheduled articles before starting the migration.</p>
Data	Promoted Search Terms
URL Redirect	If a URL is bookmarked before migration, it redirects to the same article after migration only if the URL does not change.
Workflow and Approval Processes	Approval process history doesn't migrate to Lightning Knowledge.
ContentPublication	Due to the <i>ContentPublication</i> limit (how many <i>ContentVersion</i> objects are allowed to be created per day), the migration tool only supports orgs with 200K or fewer custom files.
ContentVersion, Physical Delete	Due to the nature of <i>ContentBody</i> reuse, if an org performs an UNDO, the <i>ContentVersion</i> rows must be physically deleted before migration. Since physical delete runs as a cron job during off-hours, the overall UNDO process can take several days.

Table 16: Metadata That Does Not Migrate from Classic into Lightning Knowledge

Metadata Types	Description
Article Type Metadata	<ul style="list-style-type: none"> • CRUD • Validation Rules • Communications Channel Mappings • Fields Sets • Compact Layouts • Audit Trails
Field Metadata	<ul style="list-style-type: none"> • Formula Fields • Required Field Flags in the Field Definition • FLS per Field
Feed Tracking	Feed Tracking does not migrate to Lightning unless there is an old article type with feed tracking enabled.
Fields Sets	Code that uses Field Sets

The following customizations are **not** functional after migration:

- SOQL that queries the concrete entity name
- Visualforce pages that refer to old article types
- Code that uses Field Sets
- Apex code that refers to old article types
- Custom Code using API calls referencing article types
- Customer application logic such as current API code
- Some AppExchange packages
- Validation Rules
- CRUD (per Article Type)
- Applications that use metadata APIs on field set, compact layouts, and so forth
- If reports point to old article types, point them to new object and record types after migration.

Now that you've learned about the Lightning Knowledge Migration Tool, it's time to [Plan and Sandbox Test Your Migration](#) on page 564.

Plan and Sandbox Test Your Migration

If you were involved in building your Classic knowledge base, you know that planning is critical. In fact, planning is the most important part of migrating to Lightning Knowledge.

Sandbox Testing

Before performing a production migration, perform a sandbox migration. We strongly recommend testing in a full-copy sandbox. There is a high likelihood of data corruption when a partial-copy sandbox is used. The steps to perform a sandbox migration are the same as a production migration. After planning the migration and reviewing the Pre-Migration Checklist, perform either the Single Article Type migration or Multiple Article Type migration.

 **Tip:** If you wish to restore knowledge articles, we recommend creating an extra dedicated full sandbox, for backup.

Pre-Migration Checklist

Whether you have one or multiple article types in Knowledge, read through the entire checklist before performing the sandbox test.

 **Important:** Refer to this checklist again when performing your org's production migration.

Article Types

When migrating from Classic to Lightning Knowledge, article types map to the same name as the new record type. They map to the API name, not the label name. Perform the following checks before proceeding to migration and be mindful of these limitations:

- Deploy any undeployed article types that you want to migrate.
- Identify and hard-delete unneeded article types.
- Change metadata settings in Knowledge article types in Setup. For example, add an article type, remove an article type, change settings on an article type, or change profile access to article types.
- Change the `Default Article Type` setting value to **None**.

Keep in mind that the following deletions cause failure in the data migration:

- Entities summarized by other entities
- Report Jobs referencing a custom entity definition
- Article types referenced by the Agent Contribution setting
- Article types referenced by the Answers Promotion setting
- Custom objects used by matching rules
- Article types used by a duplicate rule
- Managed deletions that point to the article type
- Article types with non-deletable child custom fields from other managed packages
- Article types referred to by other features, such as APEX classes or dataflows

Page Layouts

 **Important:** Page layouts adjustments are needed for them to work well in Lightning Knowledge. Admins can reassign different page layouts per record type and user profile after the migration. If so, ensure that they are properly configured before the migration.

Perform the following before proceeding to migration:

- Remove page layouts that aren't needed after migration.

Fields

When mapping fields from multiple article types into one record type, the following fields must meet certain definitions:

Field Type	Specs/Recommendation
Formula Field	Does not migrate
Currency	Define the length and decimal
Number	Define the length and decimal
Percent	Define the length and decimal
Picklist	Global Picklist Values or Define Values should be the same choice (including Deactivated Values) if picklists are mapped together.

Field Type	Specs/Recommendation
	Dependent picklists cannot be migrated. The picklist options migrate but the mapping between them does not. Admins must reset these after migration.
Multi-Select Picklist	Same as picklist
Text	Define the length and decimal
Text Area (Long)	Define the length
Text Area (Rich)	Define the length and decimal

Additional Field Considerations

- If field size is reduced prior to migration but the articles have more characters than before field size reduction, all of the text may show in Classic. However, after the migration, the field size is truncated in the new object. This means the additional characters will not display. For example, if a field with 500 characters is increased to 1000 in Classic, there can be 1000 characters in the field but only 500 of them display in Lightning.
- Required field flags don't migrate. Therefore, required fields must be rethought after migration by each org since they all reside in the same table. It is better to manage required fields through page layouts or validation rules, unless they are truly required for all records across all record types
- Default values for picklists or checkboxes don't migrate to Lightning Knowledge.
- Fields are all named *Article Type_Field Name*. This convention removes field name conflicts.
- When mapping fields to other fields, choose the target field from a picklist that establishes which one is the primary field.
- Deleted fields (soft-deleted fields that are retained for 30 days) aren't migrated.

Field Parameter Conflicts

- Picklist: Picklists only map if they have the same picklist values, the same deactivated values, or the same global picklist.

Field Dependencies Do Not Migrate

- If an org has field dependency settings, the migration tool migrates the fields. However, it doesn't migrate field dependency settings.

 **Tip:** An org can have two picklist fields, **A** and **B**. **A** is the controlling picklist and **B** is the dependent picklist. The migration tool migrates both **A** and **B**, but they become stand-alone picklists and the admin must redefine the field dependency settings between them.

Pre-Migration Best Practices and Post-Migration Considerations

Mapping: Assemble complex mapping ideas using a spreadsheet or organizational tool. This gives you a sense of how to map your knowledge base in Lightning.

 **Tip:** If you map one field to another, the other field disappears. What if you want to revise it? First, unmap the fields (**A** and **B**). Then, assuming they are the same field type, field **C** cannot be mapped to **A**, but it can be mapped to **B**. Use only one level of mapping to avoid cascading.

Prepare for Validation: Print a few articles in advance so you can compare them afterward and verify a successful migration.

Bypass Inactive User Status: Knowledge article versions (*kav*) with inactive user status can cause problems during migration. When working with a record that has an inactive owner, change ownership of the record to an active owner. To enable the proper user permissions, first enable the organization preference on the User Interface page. From *Setup*, enter *User Interface* in the Quick Find box, then select **User Interface** under *Customize*. After you enable the organization preference, enable **Update Records with Inactive Owners**.

Customizations: Inspect custom elements before and after the migration to ensure that they moved to the new Knowledge object. Sometimes they break, so prepare to assess this aspect of the org when performing the sandbox migration (before migrating in production). Custom elements that reference an Article Type should be adjusted to point to the new Knowledge object after migration.

Here are a few examples of customizations to consider in your post-migration assessments:

 **Important:** For successful migrations, the following actions must be performed after migration, before selecting **Accept**. For unsuccessful migrations, the following actions must be performed manually before selecting **Undo**; otherwise, the new knowledge object may not be deleted after undoing the migration.

- SOQL that queries the concrete entity name
- Visualforce pages that refer to old article types
- Code that uses Field Sets
- Apex code that refers to old article types
- Custom code using API calls that references article types
- Customer application logic such as current API code
- Some AppExchange packages
- Validation Rules
- CRUD (per Article Type)
- Applications that use metadata APIs on field sets or compact layouts

Case and Answer Settings

- In Case Settings, under Allow user to create an article from a case, set the Default article type to **None**.
- In Answer Settings, under Allow users to create an article from a reply set the Default article type to **None**.

Maintenance Notice: Stop Knowledge Base Activity During Production Migration

Before performing your production migration, communicate a company-wide bulletin ensuring that the following activities stop during migration.

 **Warning:** Make sure that no changes are made to any Knowledge content during migration. All revised data is lost or damaged.

Activities that must stop during migration:

- Editing Articles
- Creating Articles
- Changing the Publishing status of Articles
- Changing Knowledge Setup
- Votes on an Article
- Linking to a Case
- Linking to a Work Order/Work Order Item
- Adding feed posts, changing feed posts, or following an article
- Edits to Files attached to articles
- Adding Topic Mappings to Articles in Communities

 **Tip:** To stop many of the cited activities during migration, remove Create or Edit rights to Knowledge for user profiles other than the Admin.

Get Ready to Use the Lightning Knowledge Migration Tool

After planning and successfully sandbox testing, perform the migration in your production org. Do you have a single article type org or a multiple article type org? Proceed to the appropriate guide (the same one you used for sandbox testing) and move your knowledge base from Classic into Lightning:

- [Perform the Migration: Single Article Type Org](#) on page 575
- [Perform the Migration: Multiple Article Type Org](#) on page 568

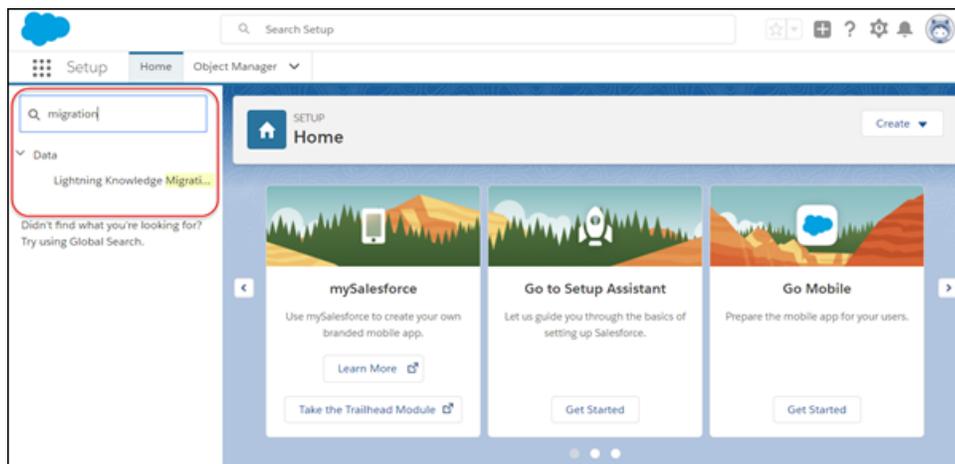
Perform the Migration: Multiple Article Type Orgs

You planned your migration. You went over the pre-migration checklist and you made all the prerequisite revisions to your Classic knowledge base. You're aware of the limitations. You're ready to go. Here's your step-by-step guide to using the Lightning Knowledge Migration Tool with multiple article type orgs.

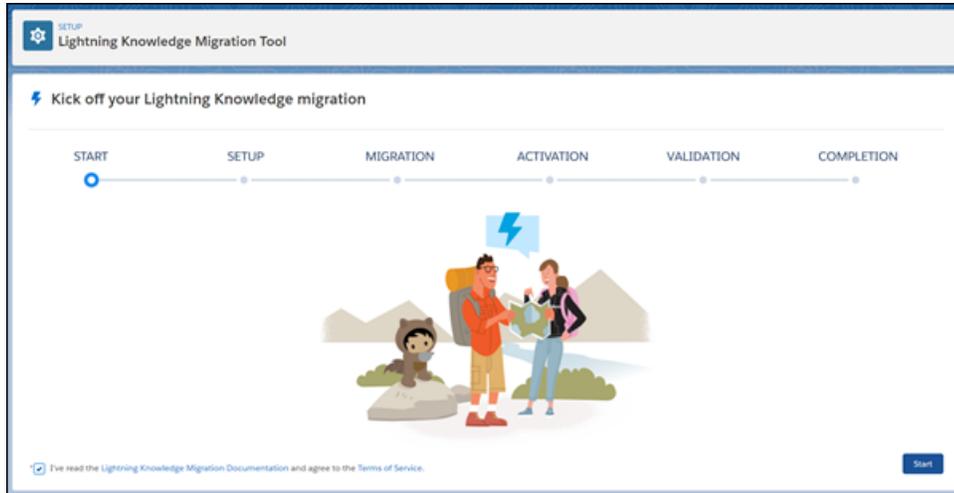
 **Note:** This procedure applies to both sandbox and production migrations

Multiple Article Type Migration

1. Switch to Lightning Experience.
2. From Setup, in the Quick Find box, enter *migration*, and then select **Lightning Knowledge Migration Tool**.

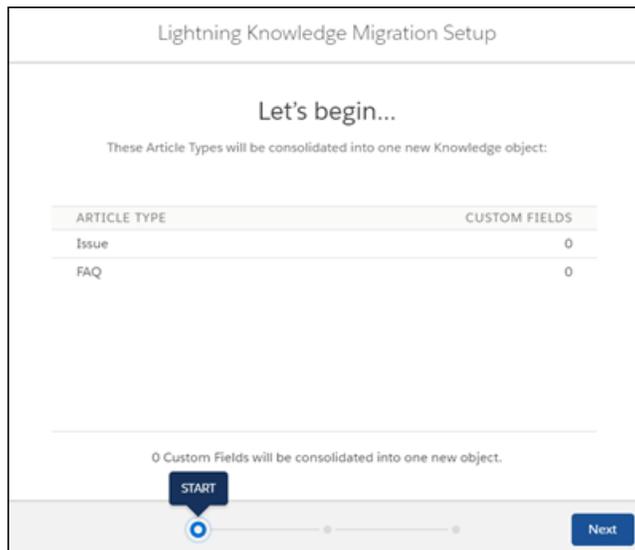


3. Follow the on-screen instructions and start the migration.

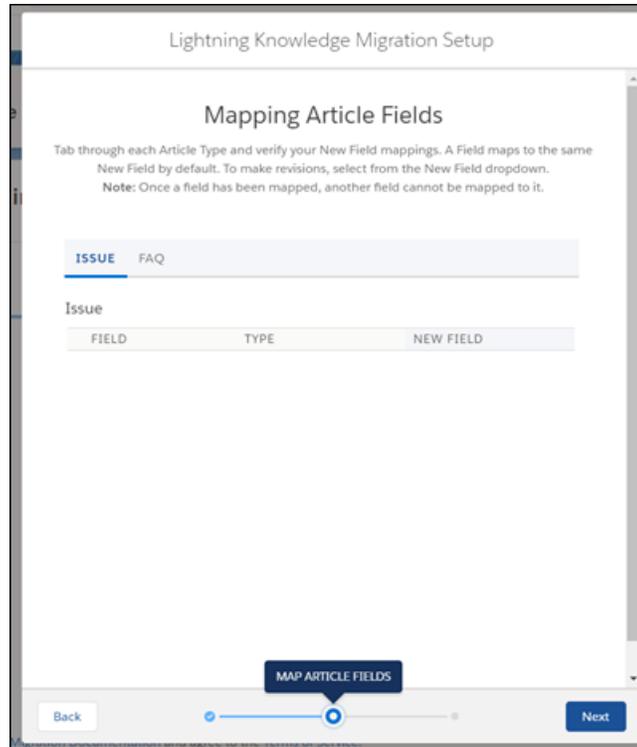


Note: If you receive an error message after beginning the migration, follow the instructions in the message, then restart the migration.

- 4. Start Migration Setup:** This screen provides a summary of the Article Types and Custom Fields that are going to be captured in the migration.

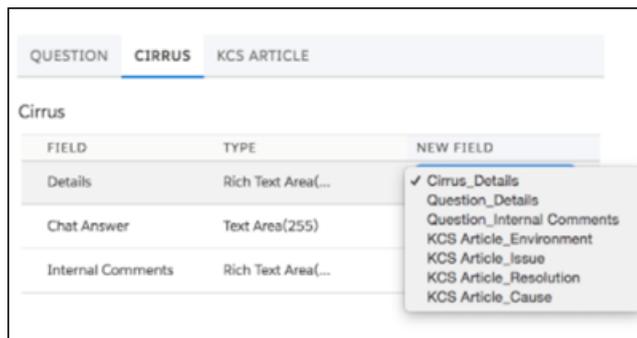


- 5. Map Article Fields:** Mapping is one of the most important steps in the migration. Tab through each of the Article Types and make your New Field selections.



Important: Fields map to the same New Field name by default.

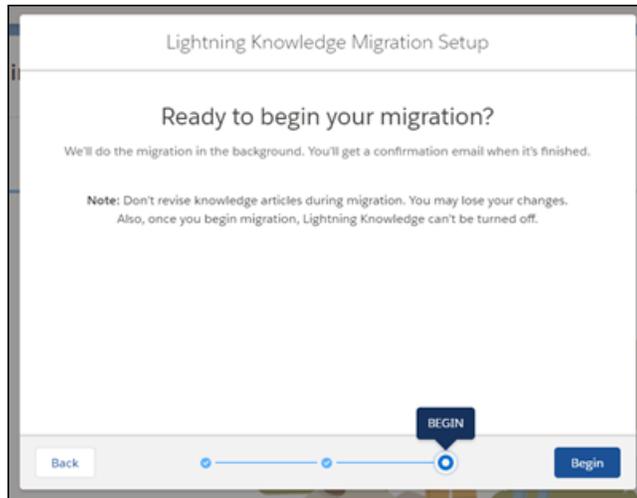
- Click the dropdowns under New Field to change the hierarchy, as necessary.



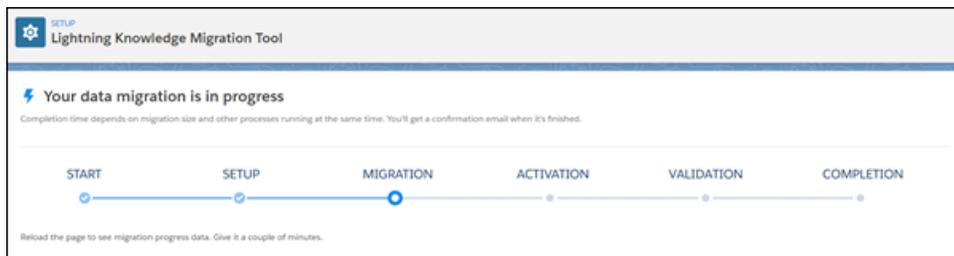
Tip: If there are fields of the same type that are common across Article Types that you would like to consolidate in the new Object, you can do that here. If multiple Article Types have a field called Question, you can map all of the Article Types to use the Question field from one Article Type to reduce duplication in the new Object.

- After you map article fields, tab through each Article Type again. Review your Article Type field mappings, then proceed to the next screen.
- Begin Data Migration:** Follow the on-screen instructions and begin the migration. A confirmation email is sent to you when it's complete.

Warning: If you create a new article or update an existing article during Data Migration, these changes might not get migrated.



9. Reload this page to view migration progress data. It can take a few minutes to load the data. Refresh to see progress, as necessary.



-  **Note:** Completion time depends on the size of the knowledge base you're migrating and how many other processes are running at the same time. Feeds and Smart Links will be migrated during the Activation step. If at least one existing Article Type has Feed Tracking enabled, Feed Tracking will be turned on automatically for the new Knowledge Object.

⚡ Get ready to make the switch to Lightning

We're going to activate your new Knowledge object.

Note: The migration disables old article types and enables Lightning Knowledge. If you have feeds or smart links, they will migrate in the next step.

START SETUP MIGRATION **ACTIVATION** VALIDATION COMPLETION

Data Migration Summary

- ✓ **Articles:** 6 of 6 migrated successfully
- ✓ **Article Histories:** 45 of 45 migrated successfully
- ✓ **Article Versions:** 22 of 22 migrated successfully
- ✓ **Case Associations:** 2 of 2 migrated successfully
- ✓ **Data Categories:** 21 of 21 migrated successfully
- ✓ **Files:** 0 of 8 migrated successfully
- ✓ **Einstein Answers, Candidate Answer:** 0 of 0 migrated successfully
- ✓ **Einstein Answers, Candidate Answer Feedback:** 0 of 0 migrated successfully
- ✓ **Einstein Answers, Labelled Answer:** 0 of 0 migrated successfully
- ✓ **Linked Articles:** 1 of 1 migrated successfully
- ✓ **Promoted Search Terms:** 0 of 0 migrated successfully
- ✓ **Topics:** 0 of 0 migrated successfully
- ✓ **View Stats:** 30 of 30 migrated successfully
- ✓ **Vote Stats:** 30 of 30 migrated successfully
- ✓ **Votes:** 2 of 2 migrated successfully

The Lightning Knowledge Migration Documentation has been read and [Terms of Service](#) agreed to by: Test User

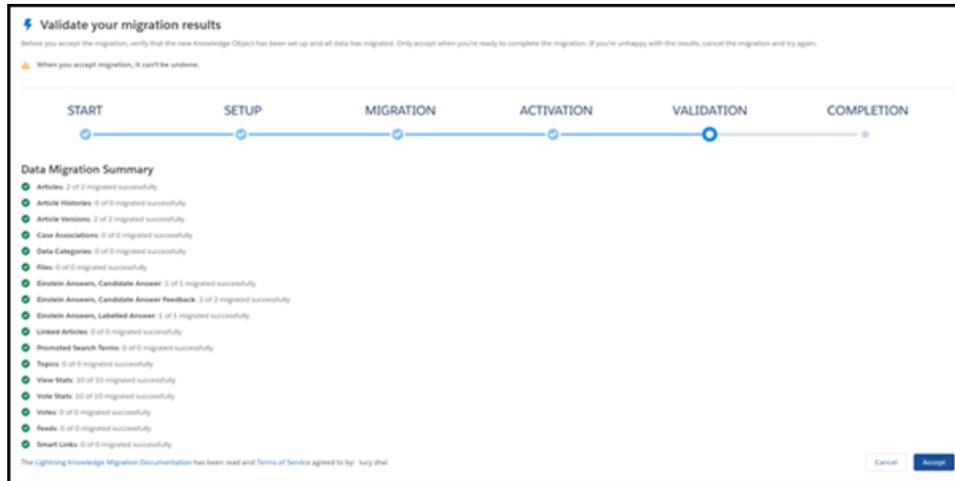
10. Completion: when the migration is finished, the Data Migration Summary page appears under Activation. Click **Cancel** to cancel the migration or **Next** to continue the migration. At this stage, no manual changes are required.

After you click **Next**, feeds and smart links migrate. Also, selecting **Next** activates the new Knowledge Object and deactivates the existing Article Types.

 **Note:** The feed component and feed posts don't appear immediately after migration. After you activate the new Knowledge Object, the feed component on articles disappears temporarily while the feed posts migrate. Then the feed component reappears.

11. Review the Data Migration Summary under Validation. In the example, there are green check marks indicating 100% migration. Yellow warning flags (not present in this migration) appear beside data that didn't migrate.

 **Note:** If the migration summary shows that some articles did not migrate, a file named `LightningKnowledgeMigrationResult<timestamp>.txt` will be generated. This file will report up to 1000 failed migrated article IDs. It can be found under the Files tab. The admin who started the migration owns this file. If all articles and article versions were migrated successfully, the file will not be generated even if related data such as Data Category or Feeds failed to migrate.



12. At this point, after you validate the results in the Data Migration Summary and find them satisfactory, you have two options:

- **Cancel the migration:** If you see warning flags, **Cancel** the migration to reassess. Canceling the migration restores the Classic knowledge base with Article Types and File Fields and removes the new Knowledge object created during the migration. When restoration is complete, try the migration again.
- **Accept the migration:** We strongly recommend that you validate before you accept the migration. Validation steps are outlined in the next section. Accepting the migration enables your new Lightning Knowledge org. It deletes the old Article Types and Classic versions of the articles, including versions that weren't migrated. Once you accept the migration, it cannot be undone.

 **Warning:** Do not make any updates to the Knowledge Object or the existing Article Types in the Object Manager before accepting or canceling the migration. If you do, **Cancel** and **Accept** will stop working.

13. If the migration was successful and you want to proceed, validate the following (most of which are already done for you during the migration process), before selecting **Accept**:

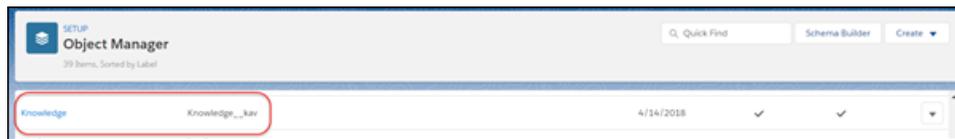
- No Apex code is referencing the old Article Types to be deleted. If referenced, manually remove the Apex code.
- Communities or Sites are not referencing the old Article Types to be deleted.
- Data flows are not referencing old Article Types to be deleted.
- Make sure no Process Builder flows, workflows, or approval processes still reference the old data model.
- Classic Article Types to be deleted. Classic Article Types are no longer referenced as the default Article Type used for articles created from replies.
- Click the gear icon in the upper right-hand corner, and select Developer Console.
- In the toolbar of the Developer Console, select Edit, then Search in Files.
- In Case Settings, under Allow user to create an article from a case, set the Default article type to **None**.
- In Answer Settings, under Allow users to create an article from a reply set the Default article type to **None**.
- Enter `__kav` in the Search field and click the magnifying glass icon. This returns all instances of APEX code in your org that contains a reference to an Article Type object (`*__kav`). Update code during the validation period after the Migration Tool is run, but before the changes are accepted. If not, your existing code won't function properly.
- Verify all old Article Types to a Deployment status of **In Development**
- Verify `Knowledge_kav` to a Deployment status of **Deployed**.

- Your new code needs to reference the **new Knowledge__kav object** if the migration tool created that object to migrate multiple article types. Also, the code needs to filter SOQL queries by the appropriate record type ID where necessary. Remember that SOQL queries must filter by Record Type IDs instead of Record Type. Record Type IDs can be different between sandboxes and production, so include code that looks up the ID of the Record Type by Object. Ideally, you would put this in a reusable utility class.

14. If the migration was unsuccessful, you can select **Cancel** after some verification steps. The length of time to cancel the migration depends on migration size and how many other processes are running at the same time. Once complete, you can retry the migration. Similar to **Accept**, there should be no components referencing the new Knowledge Object **Knowledge__kav**. See Step 13 above for the list of potential components that could be referencing the object. If **Cancel** is unable to delete the **Knowledge__kav object**, you will receive a notification email with instruction to manually hard delete the object. After the object has been deleted successfully, the **Cancel** process will automatically resume.

Validation: Accept or Cancel the Migration

1. **Metadata Setup:** Click the `Object Manager` tab and scroll down the list.
2. `Knowledge` appears in the Object Manager if migration was successful.



3. In the Object Manager, select **Fields and Relationships** from the left-hand column. Review the `Field Labels` to verify successful migration.
4. Verify successful migration of the other objects by reviewing `Page Layouts`, `Record Types`, and others in the left-hand column.
5. **Data:** A tab named `Knowledge` has been created for the new Knowledge Object. Go to this tab to view and validate the migrated articles.

 **Tip:** We recommend using a selection of pre-existing articles to validate the before and after contents.

6. If validation was successful, return to the migration tool and **Accept** the migration.
7. Proceed to the **Post-Migration Checklist**.

Post-Migration Checklist

After accepting a successful migration and confirming the new Knowledge object, inspect and setup key aspects of the new Lightning Knowledge base.

1. From Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**
2. Review each of the setup options for `Knowledge` in Object Manager to verify that the mappings are correct.
3. **Dependent Picklists:** Picklist options migrate but the mappings between them don't. Reset dependencies after migration.
4. Add Field level security and users who can access the field, as needed.
5. **Formula Fields:** Article Types are consolidated into one object so redefine formulas as needed in the new object.
6. **Validation Rules:** Article Types have now been consolidated into one object, requiring changes to the rules that you define. Copy the settings from the sandbox org.
7. **Page Layouts per Record Type:**

- **Fields in Page Layouts:** Add any fields to page layouts that were hard coded to the pages in Classic.
 - Verify how Page Layouts are associated to Record Types and User Profiles and adjust as needed.
 - **Related Lists:** Add Related Cases if your agents attach articles to cases. Add Files if the org uses File Attachment to articles. Add Work Orders and Work Order Line Items if you use Field Service. Use Approval History if the org uses Approval Processes or Submit for Approval actions.
 - **Add Actions:** Actions show on the page if they are in the page layout as shown, and if the user has access to use them.
- 8. Compact Layouts (per Record Type):** In Classic, the Compact Layout was only used for Salesforce Mobile. In Lightning, compact layouts determine what shows at the top of the Record Home Page. Compact Layouts can be configured differently per Record Type.
- **Recommended Fields for Compact Layout:** Title, Publishing Status, Validation Status (if used in your org), Record Type, and Last Modified Date, Language.
- 9. Communication Channel Mapping:** Set up fields to insert into the email per Record Type.
- 10. Workflow and Approval Processes:** All Article Types are now consolidated into one object, requiring changes to Validation Rules. You may no longer need some workflows to be created separately for each Article Type since they are now all in a single Object. However, you may need to adjust the Workflow and Approval Process criteria to look at Record Type.
- 11. Process Builder Processes:** Make sure that Processes now reference the new Knowledge object.
- 12. Customizations:** Inspect custom elements after the migration and ensure that they moved to the new Knowledge Object.
- 13. Permissions:** Create, Read, Update, or Delete per Article Type no longer work in Lightning since there aren't any separate Article Types. Also, there is no Create, Read, Update, and Delete per Record Type.
- 14. Permissions Solutions:**
- Setup which Record Types each user has permission to use when creating Articles.
 - Setup Create, Read, Update, and Delete per User. Manage Authoring permissions per User Profile or permissions sets per user (for actions like edit as draft or publish, for example).
 - Set up Validation Rules to restrict certain Users or User Profiles to modify Articles of certain Record Types. Such restrictions don't allow Users to save their changes.
 - Set up Approval Processes that check Record Type and User and either routes appropriately or rejects according to your business rules.
- 15. Community Dispatcher:** Communities has a different routing mechanism, which doesn't go through the Knowledge dispatcher. After articles are migrated to the new Knowledge object, the Knowledge dispatcher routes to the correct record without changing the URL. Communities uses an old record ID in the record to use for routing. Since Communities has a different dispatcher, Lightning Knowledge provides mapping for the URL redirect.

Let's review:

1. You've validated the migration results.
2. You've accepted the results of the successful migration.
3. You've run through the Post-Migration Checklist.
4. Now it's time to train your team and roll out Lightning Knowledge to your customers.

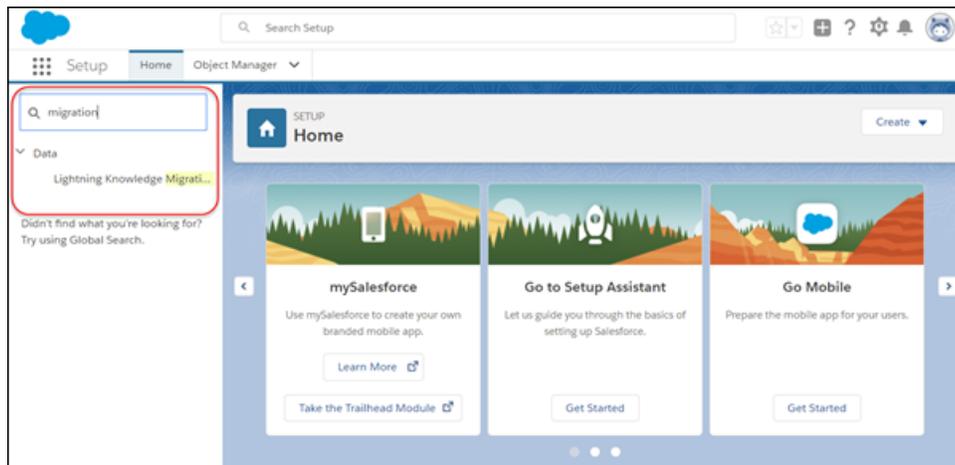
Perform the Migration: Single Article Type Orgs

You planned your migration. You went over the pre-migration checklist and you made all the prerequisite revisions to your Classic knowledge base. You're aware of the limitations. You're ready to go. Here's your step-by-step guide to using the Lightning Knowledge Migration Tool with single article type orgs.

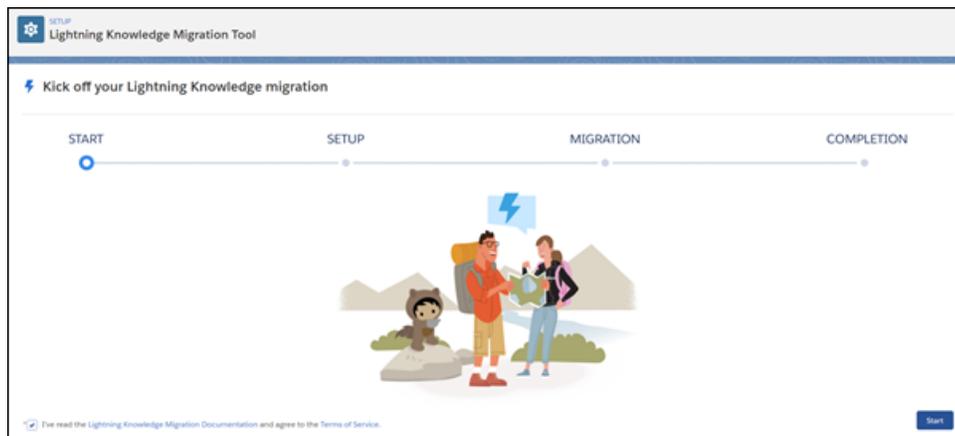
 **Note:** This procedure applies to both sandbox and production migrations

Single Article Type Migration

1. Switch to Lightning Experience.
2. From Setup, in the Quick Find box, enter *migration*, and then select **Lightning Knowledge Migration Tool**.

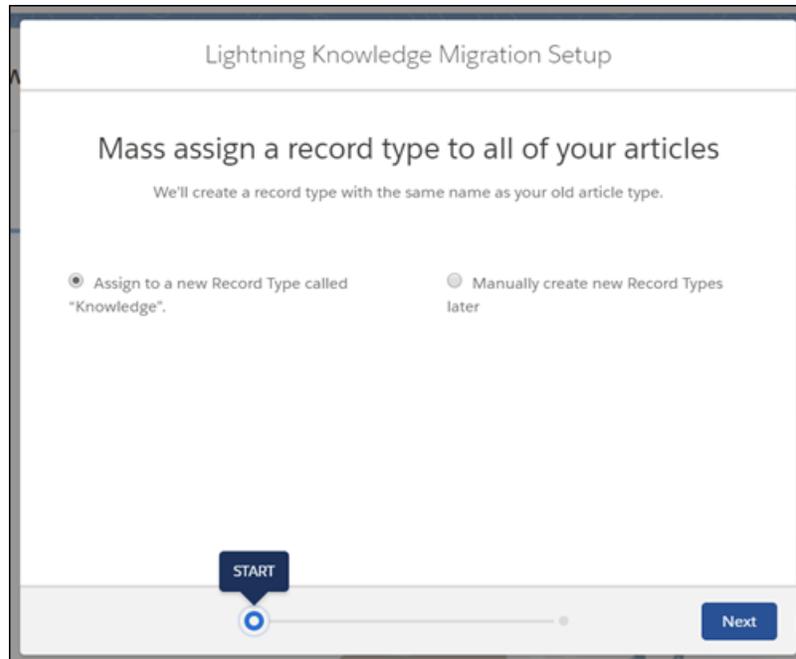


3. Follow the on-screen instructions and start the migration.



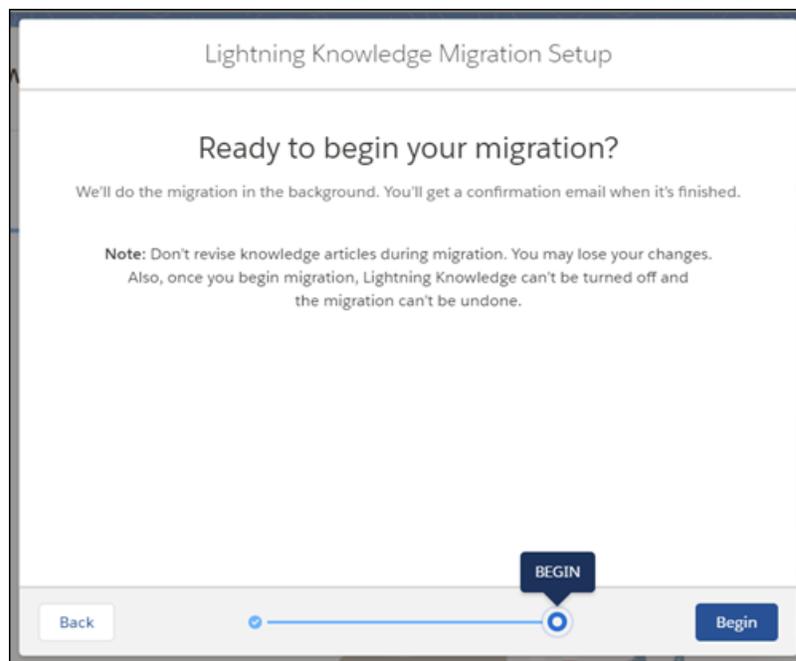
 **Note:** If you receive an error message after beginning the migration, follow the instructions in the message, then restart the migration.

4. **Record Types:** Make your Record Type selection.

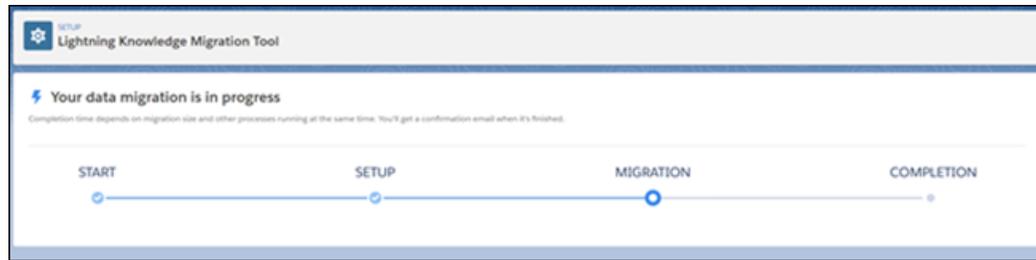


 **Warning:** Record types on articles with translations cannot be changed after this migration. If you do not assign one now, the existing translation records can't have a record type added later.

- 5. Begin Migration:** Follow the on-screen instructions and begin the migration. A confirmation email is sent to you when it's complete.



- 6. Migration Progress:** Refresh this page to view migration progress data. It may take a few minutes to load the data.



 **Note:** Completion time depends on the size of the knowledge base you're migrating and how many other processes are running at the same time.

7. **Completion:** When migration completes, the admin sees a message that the migration has completed. **Accept** the migration if it was successful. **Undo** the migration if it was unsuccessful.
8. Proceed to the Post Migration Checklist.

Post-Migration Checklist

After accepting a successful migration and confirming the new Knowledge object, inspect and set up key aspects of the new Lightning Knowledge base.

1. In `Setup`, enter `Object Manager` in the `Quick Find` box.
2. In the `Object Manager`, change the label of your old Article Type to **Knowledge**. If you have no customizations, Communities, Sites, or Apex, referencing this object, consider renaming the API name. Otherwise, change the label.
3. In the `Object Manager`, validate migration of the `Record Types`.
4. In the `Object Manager`, validate migration of `Record Types` on the **Files**.
5. **Page Layouts per Record Type:** Inspect each of these elements.
 - **Fields in Page Layouts:** Fields need to be added to page layouts that were hard coded to the pages in Classic.
 - Check how Page Layouts are associated to Record Types and User Profiles.
 - **Related Lists:** Add Related Cases if you plan to attach articles to cases. Add Files if the org uses File Attachment to articles. Or, add Work Orders and Work Order Line Items if using Field Service. Use Approval History if the org uses Approval Processes or Submit for Approval actions.
 - **Add Actions:** Actions show on the page if they are in the page layout as shown, and if the user has access to use them.
6. **Compact Layouts (per Record Type):** In Classic, the Compact Layout was only used for Salesforce Mobile. In Lightning Knowledge, compact layouts determine what shows at the top of the Record Home Page. Compact Layouts can be configured differently per Record Type.
 - **Recommended Fields for Compact Layout:** Title, Publishing Status, Validation Status (if used in your org), Record Type, and Last Modified Date, Language.
7. **Permissions:** CRUD per Article Type no longer works in Lightning since there are not separate Article Types and there is no CRUD per Record Type. CRUD applies to the single Knowledge Object.
8. **Permissions features:**
 - Setup which Record Types each user has permission to use when creating Articles. *(optional)*
 - Set up CRUD per User. *(required)*
 - Manage Authoring permissions per User Profile or permissions sets per user. *(required)*

- Set up Validation Rules to restrict certain Users or User Profiles to modify Articles of certain Record Types. Such restrictions don't allow Users to save their changes if the Validation conditions are not met. *(optional)*
- Setup Approval Processes that check which Record Type it is and who the User is and either routes appropriately or rejects according to your business rules. *(optional)*

9. Community Dispatcher: Communities has a different routing mechanism, which doesn't go through the Knowledge dispatcher. After articles are migrated to the new Knowledge object, the Knowledge dispatcher can route to the correct record without changing the URL. Communities uses an old record ID in the record to use for routing. Since Communities has a different dispatcher, Lightning Knowledge provides mapping for the URL redirect.

Let's Review

1. You've reviewed and accepted the migration results.
2. You've run through the Post-Migration Checklist.
3. Now it's time to train your team and roll out Lightning Knowledge to your customers.

Build Your Knowledge Base in Lightning Experience

Lightning Knowledge gives you a high-powered yet streamlined way to manage your knowledge base. With Lightning Knowledge, you get the benefits of standard objects that work just like other objects in Salesforce. Lightning Knowledge is best for orgs new to Knowledge or for existing orgs that can easily consolidate to one article type.

 **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple articles types require data migration to consolidate article types before enabling Lightning Knowledge.

Important: After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

IN THIS SECTION:

[Set Up Lightning Knowledge with a Guided Setup Flow](#)

Get up and running effortlessly with Lightning Knowledge using a quick guided setup flow. Create your Knowledge base, select your article authors, and make data category groups.

[Compare Salesforce Knowledge in Salesforce Classic and Lightning Experience](#)

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

[Lightning Knowledge Limitations](#)

Keep these limitations in mind when making the switch to Lightning Knowledge.

[Set Up and Configure Lightning Knowledge](#)

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

[Use Your Lightning Knowledge Base](#)

Search articles, author and manage articles, use the Knowledge component in the Lightning Service Console, and create Knowledge reports.

Set Up Lightning Knowledge with a Guided Setup Flow

Get up and running effortlessly with Lightning Knowledge using a quick guided setup flow. Create your Knowledge base, select your article authors, and make data category groups.

The Lightning Knowledge setup flow is the fastest and easiest way to get your knowledge base up and running. Whether it's a secure customer portal, part of your public site, or integrated into a public customer community, your knowledge base can be an extension of your service website.

You can also embed Lightning Knowledge in the console so your support agents can easily find, access, and deliver the right answers to customers. Agents can also contribute to the knowledge base, ensuring that the best answers are always accessible to the whole team.

 **Important:** After you enable Lightning Knowledge, you can't disable it.

EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. If your org has Service Cloud, you can get to Service Setup by clicking  and selecting Service Setup.

In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Enabling Lightning Knowledge
- Choosing knowledge article authors
- Creating data categories and data category groups

 **Tip:** Data Category Groups help you classify and find articles. You can use data categories to control access to a set of articles, questions or ideas.

We also turn on several things in the background during the setup flow.

Enabling Lightning Knowledge

We enable Lightning Knowledge during the flow, which can't be undone. Don't worry about this if you've never used Knowledge before and you're ready to dive in on Lightning Experience.

Lightning Knowledge is different than Salesforce Knowledge in Salesforce Classic, so if you already use Salesforce Classic, make sure you know and understand what changes and what works differently when you switch.

Default Page Layouts and Record Types

There is a default FAQ page layout and record type that is auto-enabled in the setup flow. This is how the articles are displayed in your layout. By doing this step, you are associating the page layout and record types. However, if you prefer, you can still go into the Object Manager to create or modify your page layouts.

 **Note:** If you created a page layout and record type before starting the Lightning Knowledge setup flow, we don't create new ones in the setup flow. The integrity of your initial settings isn't altered in any way.

Knowledge Permission Sets

Your selected authors get full read, write, and publishing access through the Knowledge LSF permission set, and access to the Knowledge Object.

The setup flow auto-enables the page layout and record type for these profiles. Everyone whom you designate an author gets a Knowledge User License.

The setup flow grants data category visibility to profiles selected on the Choose Author screen.

IN THIS SECTION:

[Lightning Knowledge Setup Flow: What's Next?](#)

Learn where you can customize and view what you set up during the Lightning Knowledge setup flow.

SEE ALSO:

[Get Started with Service Setup](#)

[Classic Knowledge User Access](#)

[Find Object Management Settings in Salesforce Classic](#)

[User Licenses](#)

Lightning Knowledge Setup Flow: What's Next?

Learn where you can customize and view what you set up during the Lightning Knowledge setup flow.

After completing the setup flow, you have a budding Knowledge base that's ready to be filled with great articles for your customers.

Review Your Data Categories

Take a look at the data categories and data category groups you created during the flow. Your customers can use these to help find articles, so make sure they're clear and they cover everything you want to cover. If you didn't create any during the flow, go ahead and create some.

Write and Publish Articles

Now that you've set up Lightning Knowledge it's time to start writing and publishing articles. You can do this from Knowledge home in Lightning Experience or in the Knowledge tab or Article Management tab in Salesforce Classic.

Check it Out in the Console

Add the Lightning Knowledge component to one of your Lightning console apps and see suggested articles while you browse your team's cases. You can also search and sort articles, attach and remove articles from cases and chats, and follow and unfollow articles.

SEE ALSO:

[Create and Edit Articles](#)

[Create Lightning Knowledge Record Types](#)

[Use the Knowledge Component in the Lightning Service Console](#)

[Lightning Knowledge Limitations](#)

[Create and Modify Category Groups](#)

[Data Category Visibility](#)

[Modify Default Category Group Assignments for Articles](#)

Compare Salesforce Knowledge in Salesforce Classic and Lightning Experience

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

Lightning Knowledge has changed the way Knowledge works in Salesforce. For example, standard record types replace article types, and the Knowledge component for Lightning Service Console replaces Knowledge One for the Service Console in Salesforce Classic.

Lightning Knowledge works differently than Classic Knowledge, but currently has limitations. Let's compare Knowledge in Salesforce Classic and Lightning Experience.

Feature	Classic Knowledge	Lightning Knowledge
Setup	Salesforce Classic Setup	Lightning Knowledge Setup
Types of articles	Article Types	Standard Record Types
Languages	Multiple Languages mode and translation available	Search and read translated articles
Use Knowledge in the console	Add Knowledge One to the Service Console	Add the Lightning Knowledge component via the Lightning App Builder
Page layouts	Fields only, per article type and user profile	Fields, actions, and related lists, per record type and user profile
Record home (articles)	Custom record home	Default Record Home and Record Home that is configurable via the Lightning App Builder
Object home	Knowledge One and Article Management tab	Knowledge home page with list views
Access and permissions	CRUD, profile permissions, page layouts, and custom article actions per public group	CRUD, profile permissions, and page layouts
Files	Files are attached in custom file fields	Files are stored in the standard Files Object and attached in the files related list

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), 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.

Lightning Knowledge Limitations

Keep these limitations in mind when making the switch to Lightning Knowledge.

 **Note:** Enabling Lightning Knowledge changes your org's data model to use record types rather than article types. For moving from Classic to Lightning Knowledge, use the [Lightning Knowledge Migration Tool \(Beta\)](#). Test data migration in a sandbox or trial org before enabling your production org. After you enable Lightning Knowledge, you can't disable it.

Important considerations before enabling Lightning Knowledge

- To move your knowledge base out of Classic into Lightning Experience, use the [Lightning Knowledge Migration Tool \(Beta\)](#) on page 560. Single and Multiple article type org administrators can use this tool to convert their article types into record types under a new Knowledge object.
- Article actions with public groups are not used when Lightning Knowledge is enabled. User profile permissions have replaced article actions.
- In a Lightning Knowledge enabled org, the *ModifyAll* permission is required to delete archived articles.
- For list views, you must specify one language and one publishing status on all Knowledge list views. If one language and one publishing status are not specified in *ListViews*, Lightning Knowledge defaults to "Published" for Publishing Status and the default user language.
- Lightning Knowledge doesn't support multiple-selection on *PublishStatus* or *Language*, or the "IN" and "OR" operators in list view filters.
- Assign and Submit For Translation requests from LEX, emails must contain the LEX url not aloha url.
- After you enable Lightning Knowledge, the Article Type field is no longer accessible via SOQL (or the API). This can impact custom code that queries for the *ArticleType* field.
- If your org currently has a Visualforce tab named "Knowledge," you get an "Insufficient Privileges" error when trying to access the Knowledge tab in Lightning Knowledge. To avoid this error, rename or delete your existing Visualforce tab, or rename your Knowledge Base from "Knowledge" to something else.

General usage limitations for Lightning Knowledge

- Delete archived articles is not available in Lightning Knowledge. (You can still perform this action in Classic when Lightning Knowledge is enabled.)
- For articles with more than 30 versions, the versions above 30 show in Salesforce Classic, but not in Lightning Experience.
- You currently can't remove a published article while editing it. Instead, the article remains published while you edit the new version as a draft. You can still perform this action in Classic when Lightning Knowledge is enabled.
- The action to restore a past version of an article is not available in Lightning. (You can still perform this action in Classic when Lightning Knowledge is enabled.)
- Mass actions (such as mass archiving and mass publishing) are not available in Lightning Knowledge.
- Data categories can't be shown in Knowledge list views.
- You can't add promoted search terms to articles in Lightning Knowledge.
- You can't see vote information in the new ratings component unless there's a Published (also known as online) version of the article. This affects article drafts and archived articles, because all online versions are removed when an article is archived.
- Most Knowledge actions aren't available in the Lightning Process Builder.
- Translation files cannot be exported from the Files Related list for translation.
- Master Article: When only importing a master article *with its record type info*, Knowledge creates the article with the record type.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

- Master Article: When importing a master article *with its translation and record type*, Knowledge creates the article and its translation, but not the record type.
- Modifying search results in Knowledge search layouts does not change the results in Lightning Knowledge Global Search or Classic Global Search.
- Anchors aren't supported in the rich text editor in Lightning Knowledge.
- URL formats for articles differ between Classic and Lightning Knowledge. In Lightning Knowledge, the URL (along with other parameters) contains the Knowledge Article Version ID. In Classic Knowledge, the URL contains the Knowledge Article ID.
- Prior to December 2017, when knowledge articles were authored with images in Lightning Experience, only the author could view the images. Other users with Read perms enabled for knowledge articles were not able to see the images. As of December 2017, a fix was back ported that remedied this issue. Photos uploaded from December 2017 forward are now visible to all users with Read perms enabled. Photos uploaded prior to December 2017 must be reuploaded.

Console limitations for Lightning Knowledge

- The Knowledge footer is not in the Lightning Service Console.
- The following actions aren't available in the Knowledge component for the Lightning Service Console: attach as a PDF to case email and insert article Community URL to case publishers.
- In the Knowledge component, File from Custom Fields and File Related Lists cannot be automatically added to a Case email when performing an insert article to email action.
- Case field to Data Category mapping for search filters isn't currently available in the Lightning Knowledge Component.

Limitations in Salesforce Classic after enabling Lightning Knowledge

- Page Layouts selections for Actions and Related lists are not available in Salesforce Classic Record Home.
- Two Column Page Layouts are not available in Salesforce Classic Knowledge Record Home
- Some actions, such as Change Record Type, aren't available in Salesforce Classic.
- Knowledge list views aren't available in Salesforce Classic.
- Filtering a search by Knowledge Record Type is not available in Salesforce Classic.
- Filtering a search by archived articles is not available in Salesforce Classic (except in Article Management).
- Files in the Files Related list in Lightning Experience don't display in Salesforce Classic.
- Files in the Article File Fields in Salesforce Classic don't display in Lightning Experience.

Limitations for using Lightning Knowledge with other Salesforce products

- File attachments in your Classic Knowledge implementation don't transfer to Lightning Knowledge. After migrating your articles to Lightning Knowledge, add the Files Related List to your page layout. Then, use the Files Related List on each article to add files to your articles.
- You can't detach or remove a file from the Files component after it has been associated with an article. When the file is shared with a record via the record feed, the workaround is to delete the feed post.
- To remove an attached file from an article, delete the file from File home.
- If you are using Salesforce for Android or iOS, recent articles are not displayed on object home.
- The Files Related List on Knowledge articles is not supported in Communities.

Set Up and Configure Lightning Knowledge

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

IN THIS SECTION:

[Enable Lightning Knowledge](#)

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

[Lightning Knowledge User Access](#)

Specify which agents in your company are Lightning Knowledge users. Create user profiles with the user permissions they need, and then assign them to these profiles.

[Create Lightning Knowledge Record Types](#)

Create record types to distinguish types of Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

[Customize Your Lightning Knowledge Record Type Page Layouts](#)

For each record type you create, you can customize the page layout. You can control the form and structure for each type of article you have in your Lightning Knowledge base.

[Create Lightning Knowledge Home](#)

Create the Lightning Knowledge home page to access Knowledge in Lightning Experience. For orgs created in Spring '17 or later, the Lightning Knowledge home page is created for you.

[Set Access for Lightning Knowledge](#)

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users, those who can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), 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.

Enable Lightning Knowledge

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

1. From Salesforce Classic Setup, enter *Knowledge* in the *Quick Find* box and click **Knowledge Settings**.
2. If you're new to Knowledge, enable Knowledge in Salesforce Classic by selecting **Yes** and clicking **Enable Salesforce Knowledge**.
3. On the Knowledge Settings page, click **Edit**.
4. Select **Enable Lightning Knowledge**.
5. Click **Save**.

After Lightning Knowledge is enabled, the node **Knowledge Object Setup** appears. This is where you control your Lightning Knowledge settings and page layouts.

Whenever you change the name and API name of your Knowledge Base in **Knowledge Object Setup**, we recommend you do a hard refresh of your browser to avoid server errors.

-  **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple articles types require data migration to consolidate article types before enabling Lightning Knowledge. **IMPORTANT:** After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Lightning Knowledge User Access

Specify which agents in your company are Lightning Knowledge users. Create user profiles with the user permissions they need, and then assign them to these profiles.

By default all internal users can read articles. However some licenses like the Knowledge Only User licenses, require the "AllowViewKnowledge" permission on the user's profile. To give a user the "AllowViewKnowledge" permission on their profile, activate the permission on a cloned profile and assign the cloned profile to the user.

 **Note:** To do more than read articles, agents need the Knowledge User license.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to the user's name or click **New** to create a user.
3. If you are creating a user, complete all the required fields.
4. Select the *Knowledge User* checkbox.
5. Click **Save**.

See

User permissions control access to different tasks in Salesforce Knowledge. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you can create a permission set called "Article Manager" that includes the permissions to create, edit, publish, and assign articles.

Refer to this table for details on permissions associated with Lightning Knowledge tasks. Refer to [Classic Knowledge User Access](#) on page 643 on permissions associated with Classic Knowledge.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
To create articles from cases using the standard editor:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Create" on the user profile
To search articles from cases and attach articles to cases:	"Read" on the user profile
To search for and read articles:	"Read" on the user profile
To create or edit articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", and "Edit" on the user profile

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To create record types and assign permissions:

- Customize Application
- AND

Manage Salesforce Knowledge

Salesforce Knowledge Task**User Permissions Needed**

To edit draft articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read" and "Edit" on the user profile

To delete articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read", "Edit", and "Delete" on the user profile

To publish articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read", "Create", "Edit", and "Delete" on the user profile

AND

"Publish article" on the user profile

To assign articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read" and "Edit" on the user profile

To edit published or archived articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read", "Create", and "Edit" on the user profile

To archive articles:

"Manage Articles" (This permission is on by default in the System Administrator profile.)

AND

"Read", "Create", "Edit", and "Delete" on the user profile

AND

"Archive Article" on the User Profile.

AND

Modify all

To submit articles for translation:

"Manage Articles"(This permission is on by default in the System Administrator profile.) AND Article Translation-Submit for Translation

AND

"Read", "Create", and "Edit" on the user profile

Salesforce Knowledge Task	User Permissions Needed
	AND "Submit for Translation" at the user profile
To delete translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Edit", and "Delete" on the user profile
To publish translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND Article Translation-Publish AND "Read", "Create", "Edit", "Publish", and "Delete" on the user profile
To edit translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND Article Translation-Edit AND "Read", "Create", and "Edit" on the user profile
To import articles:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.) AND "Manage Articles" AND "Manage Knowledge Article Import/Export" AND "Read", "Create", "Edit", and "Delete" on the user profile
To import and export translated articles:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.) AND "Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Manage Knowledge Article Import/Export" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", "Edit", and "Delete" on the user profile
To create data categories	"Manage Data Categories" permission. This permission is on by default in the System Administrator profile.

Create Lightning Knowledge Record Types

Create record types to distinguish types of Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

Different content has different needs. For example, your FAQ pages are different from your tutorials, which are different from your policy statements. Record types let you control the content and layout for each type of article.

1. From Setup, go to **Object Manager** and select **Knowledge**.
2. Click **Record Types**.
3. Click **New**.
4. Select an existing record type to use as a template. The new record type includes all picklist values from the existing record type that you select.
5. Enter a label for your record type.
6. If desired, enter a description.
7. Select **Active** if you want this record type to be available immediately.
8. Select the profile access for this record type.
9. Click **Next**.
10. Select the page layout that users with this profile see for records of this type.
11. Click **Save**.

Customize Your Lightning Knowledge Record Type Page Layouts

For each record type you create, you can customize the page layout. You can control the form and structure for each type of article you have in your Lightning Knowledge base.

Record type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. You can customize the fields, actions, and related lists for each record type and user profile with page layouts.

For example, you might customize page layouts by user profile when sensitive data is involved. By assigning a page layout by user profiles, you can display sensitive fields from the same article to only the agents who need to access them.

1. From Setup, click **Object Manager** and select **Knowledge**.
2. Click **Page Layouts**.
3. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.

Make your changes. The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

 **Important:** If you navigate away from your record-type layout before clicking save, your changes are lost.

 **Note:** The `Title` and `URL Name` standard fields are required.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To customize the record-type layout:

- Customize Application

Task	Description
Add a section	Drag the section element into the palette.
Change the name of a section	Double-click its title. You cannot rename the Information section.
Specify 1 or 2 columns	Select 1 or 2 columns for this layout. For 2-column layouts, you can set the navigation flow direction (up-down or left-right).
Remove a field from a section	Drag it to the right side of the palette or click the  icon next to the field.
Remove a section from the article-type layout	Click the  icon next to the section name.
Save your changes and continue editing the record type layout	Click Quick Save .

 **Tip:**

- Use the undo and redo buttons to step backwards and forwards, respectively.
- Use the following keyboard shortcuts:
 - Undo = CTRL+Z
 - Redo = CTRL+Y
 - Quick Save = CTRL+S
- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.
- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for record-type layouts that have large numbers of items available in the palette.

Next, you can assign which page layout to use for each record type and user profile.

4. Click **Page Layout Assignments**.
5. Click **Edit Assignment**.
6. Choose layout assignments, then choose the page layout you want to use from the **Page Layout To Use** dropdown:
 - Select a cell to change the page layout assignment for only that record type and user profile.
 - Assign a single page layout for all record types for a given profile. Select the user profile, or multiple profiles, by clicking the row (use SHIFT for multiple rows).
 - Assign a page layout for the record type to all user profiles by clicking the record type column name.
7. Click **Save**.

Create Lightning Knowledge Home

Create the Lightning Knowledge home page to access Knowledge in Lightning Experience. For orgs created in Spring '17 or later, the Lightning Knowledge home page is created for you.

Everything you need, all in one place. Search, view, author, and manage articles on a single Knowledge home page in Lightning Experience. Plus, you can do several authoring actions without leaving Knowledge home.

For published articles, you can:

- Create an article
- Archive a published article
- Edit a published article as a new draft

For article drafts, you can:

- Create an article
- Publish a draft article
- Delete a draft article
- Edit a draft article

For archived articles, you can:

- Create an article
- Restore an archived article

Allow other users to access these actions using standard user permissions. You can also make these actions available on the record home with page layouts.

Lightning Knowledge home uses the same list views you enjoy elsewhere in Salesforce. By default, you have list views for drafts, published articles, and archived articles. Don't forget to customize your list views to select which fields you want to display and sort with. For custom list views, keep in mind that you can't choose fields that aren't on the article record. This means that data categories, ratings, view count, and cases aren't available fields for your list views.

 **Important:** If you don't specify a language for your list views, the default language is the user language, otherwise it is the Knowledge master language. We don't support multiple-selection on PublishStatus or Language, or the "IN" and "OR" operators in list view filters.

Use the Lightning App Builder to configure record home flexipage to match your users' workflow. In addition to out of the box components, this includes components built by partners and developers from the AppExchange. You can even build your own components. The Lightning Home Record Home functionality gives Admins the flexibility to move the Ratings, Files, Versions, Data Category Viewer, and Data Category Chooser components to the areas of the page that work best for users,

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Set Access for Lightning Knowledge

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users, those who can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

Lightning Knowledge uses new user profile permissions instead of public groups to give agents access to article actions. By default, all internal users with Read permissions, can read articles. However, you need to assign permissions to agents who are publishing, archiving, deleting, and managing articles.

 **Note:** To do more than read articles, agents need the Knowledge User license.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to the user's name or click **New** to create a user.
3. If you are creating a user, complete all the required fields.
4. Select the **Knowledge User** checkbox.
5. Click **Save**.

User permissions control access to different tasks. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you can create a permission set called "Article Manager" that includes the permissions to create, edit, publish, assign, delete, and archive articles.

Refer to this table for details on permissions associated with Salesforce Knowledge tasks.

Lightning Knowledge Task	User Permissions Needed
To manage record types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.) AND "Create", "Edit", and "Delete" on Knowledge
To manage article actions:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
To search for and read articles:	"Read" on Knowledge
To search articles on cases and attach articles to cases:	"Read" on Knowledge
To create articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Create" on Knowledge

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To create article types and article actions (Classic Knowledge only):

- Customize Application
- AND
- Manage Salesforce Knowledge

To create record types and article actions (Lightning Knowledge only)

- Customize Application
- AND
- Manage Salesforce Knowledge
- AND
- Create, Edit, and Delete on Knowledge

Lightning Knowledge Task**User Permissions Needed**

To edit draft articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Edit” on Knowledge

To delete draft articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Edit”, and “Delete” on Knowledge

To publish articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

AND

“Publish Articles” (New in Lightning Knowledge)

To change the record type of a draft article:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Edit” on Knowledge

To archive published articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Edit”, and “Delete” on Knowledge

AND

“Archive Articles” (New in Lightning Knowledge)

To create a draft of a published article:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

To restore an archived article as a new draft:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on Knowledge

AND

“Archive Articles” (New in Lightning Knowledge)

Lightning Knowledge Task

To create data categories

User Permissions Needed

“Manage Data Categories” permission. (This permission is on by default in the System Administrator profile.)

To enable agents to perform their specific tasks, create [public groups](#) for each role and assign only the necessary [article actions](#) to those groups.

 **Example:** Your Salesforce Knowledge agents are a mixture of different levels of job experience and expertise in the products and services your company offers. These examples outline four basic types of users and some of the permissions they need to perform their jobs.

Scott: The Reader

Scott Jackson is relatively new to the company, so he’s a basic agent of the knowledge base. Currently, he has read-only access to articles, so he can search and view articles. Readers don’t author or publish, so he won’t belong to a public group or need to submit articles for approval. He needs the following permissions to perform his job.

Scott	Permission	Knowledge Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Search for and read articles		✓			

Amber: The Candidate

Amber Delaney is a candidate-level agent and can create and publish articles with statuses of either `Work in Progress` or `Not Validated`. If Amber works on an article with a different validation status, she must send it to a queue for approval before it’s published.

Amber is part of the KCS Candidate public group and submits the articles she can’t publish to the Publishing External queue. She needs the following permissions to perform her job duties.

Amber	Permission	Knowledge Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Search for and read articles		✓			
Create or edit article	✓	✓	✓	✓	
Edit draft articles	✓	✓		✓	
Edit a published article as a new draft or restore an archived article as a new draft	✓	✓	✓	✓	✓

Anne: The Contributor

As a contributor, Anne Murphy is a more advanced Knowledge user. She understands the standards for articles in the organization and can create articles and publish articles with `Validated Internal` status. She can also work on articles authored by other users if they have either `Work in Progress` or `Not Validated` statuses, and can change them to `Validated Internal`. Since she doesn't have permission to publish articles to an external audience, she must submit those customer-facing articles to the Publishing External queue.

 **Note:** Article approvers require the "Manage Articles" permission and at least the "Read" permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.

Anne is a member of the Contributor public group and she needs the following permissions to perform her job duties.

Salesforce Knowledge Functionality	Permission	Knowledge Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create articles					
Search articles from and attach articles to cases					
Search for and read articles					
Edit draft articles					
Delete articles (version or entire)					
Archive articles					

Pat: The Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience. He is a member of the Publisher public group. Pat also belongs to the Publishing External queue. He needs the following permissions to perform his job duties.

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases					
Create and edit articles					
Edit draft articles					
Delete articles (version or entire)					
Publish articles					
Edit a published article as a new draft or restore an archived article as a new draft					

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Archive articles					

How they all work together

Each user profile defines an agent's permission to perform different job duties and functions. To enable agents to perform these functions, you create a user profile for each role and assign only the necessary permissions to that group.

The following table lists the job functions that each role needs to perform on articles in the organization

Job Function	Reader	Candidate	Contributor	Publisher
Create and publish Work in Progress	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish Not Validated	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish Validated Internal	No	Needs approval	Automatically approved and published	Yes
Create and publish Validated External	No	Needs approval	Needs approval	Yes
Update and publish Work in Progress	No	No	Automatically approved and published	Yes
Update and publish Not Validated	No	No	Automatically approved and published	Yes
Update and publish Validated Internal	No	No	Automatically approved and published	Yes
Update and publish Validated External	No	No	Needs approval	Yes

Use Your Lightning Knowledge Base

Search articles, author and manage articles, use the Knowledge component in the Lightning Service Console, and create Knowledge reports.

IN THIS SECTION:

[Search Articles in the Main Search Box and the Knowledge Component](#)

Perform a Knowledge search in the main search box at the top of every page, and in the Knowledge component for the Lightning Service Console.

[Authoring Actions in Lightning Knowledge](#)

Manage Knowledge articles from Knowledge home and the article record home in Lightning Experience.

[Use the Knowledge Component in the Lightning Service Console](#)

The Knowledge component keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the component to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

Search Articles in the Main Search Box and the Knowledge Component

Perform a Knowledge search in the main search box at the top of every page, and in the Knowledge component for the Lightning Service Console.

In Lightning Experience, Knowledge search is available in both the main search box and the Knowledge component. The advanced search option lets you pre-filter your results by language, publishing status, validation status, record type, or data category group.

1. In the main search box, begin typing *knowledge*. Search starts recommending content and options for scoping search to specific objects.
2. Select **Limit search to Knowledge**.
3. Optionally, click **Advanced Search** to pre-filter your results by language, publishing status, validation status, record type, or data category group. Filters you've selected appear in the search box.
4. Enter your search terms.



Note: You can enter up to 100 characters. If you enter more than 100 characters, only the first 100 characters are used when you run the search.

5. Press *Enter* to run the search.



Note: You can also search Knowledge using the Knowledge component for the Lightning Service Console. Use **Advanced Search** to add pre-filters, enter your search terms, and run the search.

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Authoring Actions in Lightning Knowledge

Manage Knowledge articles from Knowledge home and the article record home in Lightning Experience.

Quickly access authoring actions in Knowledge home and the article record home using the drop-down next to each article. Administrators, agents, and internal employees with the correct profile permissions can perform these actions.

On the published articles list view in Knowledge Home, you can:

- Create an article
- Archive an article
- Edit an article as a new draft

On the article drafts list view in Knowledge Home, you can:

- Create an article
- Publish a draft
- Delete an article
- Edit an article

On the archived articles list view in Knowledge Home, you can:

- Create an article
- Restore an archived article

For the article record home, you can control the available authoring actions with record type page layouts. Additionally, you can add the following components to your record home:

- Ratings: Automatically enabled.
- Files: Add the Files related list in your record type page layout.
- Versions: Select Track Field History and Set History Tracking in Knowledge Object Setup. These options make the article version history and field changes available for Knowledge users to view in the versions component.
- Data Category Viewer and Chooser: Give the correct Knowledge users "Edit" access on Knowledge, and they can view and change an article's data categories.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), 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.

Use the Knowledge Component in the Lightning Service Console

The Knowledge component keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the component to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

The Knowledge component helps agents quickly find relevant Knowledge articles for their cases and perform some basic actions, such as attaching an article to a case.

Suggested Articles

Suggested articles are delivered right to the Knowledge component, so agents can find relevant articles without running a search. Suggested articles are automatically enabled when Lightning Knowledge is enabled.

Search and Sort Your Results

Use the search box in the component to perform a Knowledge search. If you'd like, use Advanced Search for pre-filtering to narrow the search results you see.

To sort your search results, click the sort icon and select a sort option from the list. You can sort your search results by relevance, publish date (for published articles), last modified date (for article drafts), A to Z, and Z to A. Sorting doesn't apply to suggested articles.

By default, articles are sorted by relevance. If you go back to suggested articles or go to a new case, the sort order is reset to relevance.

Attach and Remove Articles in the Knowledge Component

Agents can attach Knowledge articles to cases and remove articles from cases using the drop-down next to any article.

Follow and Unfollow with the Knowledge Component

Agents can follow and unfollow an article from the component using the drop-down next to the article. Following articles helps agents save articles that they want to read later.

Administrators, agents, and internal employees with read access to Knowledge can follow articles, and they can follow articles in any state, such as published or draft. To let Knowledge users follow and unfollow articles, enable feed tracking in **Setup > Chatter > Feed Tracking**.

The Knowledge component is automatically added to your sample Lightning Service Console. To add the Knowledge component to a custom Lightning console app, add the Knowledge component to your console's Lightning pages using the Lightning App Builder.

 **Tip:** The Knowledge component isn't limited to the console. You can add it to apps with standard navigation too. Just add the Knowledge component to a record's page using the Lightning App Builder.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)), 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.

Build Your Knowledge Base in Salesforce Classic

After you've assigned Knowledge User licenses (including to yourself), you're ready to build your Knowledge base.

To ensure that your organization has Knowledge User licenses, from Setup, enter *Company* in the Quick Find box, then select **Company Information**. Knowledge User licenses are listed near the bottom of the page, in the Feature Licenses related list.

To ensure that you are a Salesforce Knowledge user, from your personal settings, enter *Personal* in the Quick Find box, then select **Personal Information**. The Knowledge User checkbox is in the second column of the User Detail section.

To enable Salesforce Knowledge, from Setup, enter *Knowledge* in the Quick Find box, then select **Knowledge Settings**. Confirm that you want to enable Salesforce Knowledge and click **Enable Knowledge**. If your org doesn't have an article type, a default article type is created.

 **Note:** If you enabled Knowledge before Spring '16 you must create an article type first. After the Spring '16 release, you no longer need to create an article type first.

IN THIS SECTION:

[Enable Salesforce Knowledge](#)

From the Knowledge Settings page, you can create a Knowledge Base experience for your support agents, partners, and customers.

[Knowledge Article Types](#)

Article types, such as FAQs and Tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

[Import Existing Information into Salesforce Knowledge](#)

You can import your existing articles or information database into Salesforce Knowledge. This importer is for articles and translations you currently have outside Salesforce Knowledge. If you want to move your existing content from Classic to Lightning Knowledge, use the Lightning Knowledge Migration Tool.

[Classic Knowledge User Access](#)

Specify which agents in your company are Classic Knowledge users and give them access to article actions. Create user profiles with the user permissions they need, and then assign them to these profiles.

[Define Validation Status Picklist Values](#)

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

[Workflow and Approvals for Articles](#)

Ensuring that the content in your articles is accurate and helpful is foundational to getting accurate information to those who need it most. Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you additional control over the content and publication of your articles.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To enable Salesforce Knowledge:

- [Customize Application](#)

[Modify Default Category Group Assignments for Articles](#)

Salesforce Knowledge uses data categories to classify articles. Data categories are organized in category group. After creating category groups, admins decide which groups to use for Salesforce Knowledge articles. For example, if your org uses both the Answers and Salesforce Knowledge, you might want one category group to be used by the answers community and two other category groups for articles. Answers and articles can use the same category group. Authors can assign up to eight data categories from one category group to an article so that users searching for articles can find and filter by category. By default, all the category groups you create are assigned to Salesforce Knowledge.

[Filter Articles with Data Category Mapping](#)

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

[Support Articles in Multiple Languages](#)

With multiple languages for Salesforce Knowledge, you can lower support costs by translating articles into the languages your audience prefers. After selecting your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

[Improve the Article Search Experience](#)

Enable search highlights and snippets, synonyms, promoted terms, topics, and keywords from cases to improve your article search.

[Set Up the Knowledge One Widget](#)

Knowledge One is available as a widget that you can plug in to the Salesforce Console for Service or Salesforce Console for Sales. If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search, send, and create articles, all without leaving the case.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Enable Salesforce Knowledge

From the Knowledge Settings page, you can create a Knowledge Base experience for your support agents, partners, and customers.

To set up or edit your knowledge Base, from Setup, enter *Knowledge Settings* in the Quick Find box, select **Knowledge Settings**, then click **Edit**.

Feature or Option	Description
General Settings	
Allow agents to create and edit articles from the Article or Knowledge tab	Enables agents to edit articles without going to the Article Management tab. Agents can click Edit to open the article edit page. If a published version of the article exists, they can view the published version or edit the current version. If a draft version exists, they can continue with editing the existing draft, but must carefully review the draft so that they don't overwrite unpublished changes.
Activate Validation Status field	Adds a Validation Status on page 655 field to all Salesforce Knowledge articles. Agents can select values to show whether the content of the article has been validated or not.
Allow agents to add external multimedia content to HTML in the standard editor	Allows <iframe> elements in the standard editor to embed multimedia content from the Dailymotion, Vimeo, and YouTube websites. Agents can simply cut and paste <iframe> HTML into the editor.
Enable Lightning Knowledge (Beta)	Enables Lightning Knowledge (Beta). After you enable Lightning Knowledge, you can't disable it.
Article Summaries	
Show article summaries in article list views	For each channel, decide whether an article's summary details display beneath the article's title in search results.
Knowledge One	
Switch from the Articles tab to the Knowledge Tab	Enable Knowledge One with Profiles Enable Knowledge One with Permission Sets
Suggest related articles on cases	Search on the Knowledge tab suggests articles based on their content similarity and their links to similar cases. If no articles are linked to similar cases, suggested articles have similar titles as the case or have keywords in common with admin-selected case fields. Suggested articles

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Feature or Option	Description
	<p>are available in the Salesforce Console for Service and your portals when viewing existing cases and creating ones. Finally, if the suggested articles aren't suitable, the user working the case initiates a search with specific keywords, which may result in different articles.</p> <p> Note: By default, the Subject field is selected. Choose up to five of the available short text fields that include a description of the issue, the affected product, or the case topic. We recommend choosing short text fields to return more relevant results. Only the first 255 characters of the content from all admin-selected fields are searched. The Description field is always taken into account when suggesting articles for cases and does not count toward the character limit.</p>
Highlight relevant article text within search results	Search on the Knowledge tab generates a snippet of the relevant article text with the search terms bolded. See Search Highlights and Snippets .
Auto-complete keyword search	<p>Search on the Knowledge tab suggests the three most popular keyword searches performed on the Knowledge tab. Suggestions are based on the channel (internal, customer, partner, or public) the reader is searching.</p> <p> Note: Keyword search history is refreshed once a day.</p>
Auto-complete title search	Search on the Knowledge tab suggests up to 3 articles with matching titles.
Language Settings	
Default Knowledge Base Language	The primary language used for writing articles. It defaults to your organization's language. We recommend that your Default Knowledge Base Language and your organization's language are the same.
Single or Multiple Language	<p>If you support more than one language, select Multiple Languages and choose the translation settings. For instructions, see Support a Multilingual Knowledge Base.</p> <p> Important: If you enable Multiple Languages, you can't revert to a single language knowledge base. You also can't enable and use Lightning Knowledge (Beta).</p>
Case Settings	

Feature or Option	Description
Allow agents to create an article from a case	<p>If this checkbox is selected, agents can create a draft article that is attached to the case when the article is published using one of the following options.</p> <ul style="list-style-type: none"> • Create articles using the simple editor only when closing cases. • Create articles using the standard editor any time an agent creates an article. Make sure that users have “Manage Articles,” “Read,” and “Create” permissions. Designate the following: <ul style="list-style-type: none"> – The default article type, from the drop-down list – For articles created when closing a case, assign the article to a user. – Help agents create articles fast by Selecting an Apex class that pre-populates any of the fields on the draft. By default, the Title field in all draft articles contains the case subject. <p> Note: If you enable this option, also click Layout Properties on each case-close page layout and select “Enable submissions during case close and Submit Articles.”</p>
Use a profile to create article PDFs	<p>By default, when a user creates an article PDF directly from a case, the PDF includes all the article fields visible to that user. If you want PDFs generated according to a different profile, for example, a profile that hides certain fields from customers, select Use a profile to create customer-ready article PDFs on cases and choose the profile that determines field visibility.</p>
Enable list of cases linked to an article	<p>Agents and Salesforce Knowledge managers can see a list of cases an article is attached to. This helps validate if the article is the right solution for a case and shows which articles are used most, without running a report. The Linked Cases related list:</p> <ul style="list-style-type: none"> • Is visible on the detail or preview page of any article that has been published at least once. • Shows a maximum of 200 cases • Is sorted in descending order by the date the article was linked to the case. The sort order can’t be changed. • Doesn’t appear on archived articles or a translation’s edit and detail pages. • Doesn’t appear for external users such as portal or communities users or on the Salesforce app.
Share Article via URL Settings	
Allow agents to share articles via public URLs	<p>You can share an article that is available on a public knowledge base with a URL. In the Available Sites list, select the sites you want to allow your agents to send URLs from and add them to the</p>

Feature or Option	Description
	Selected Sites list. Agents can then email customer service clients with a URL to link directly to the article in your public knowledge base.
Answers Settings	
Allow agents to create an article from a reply	If this checkbox is selected, members of an answers community or Chatter Answers community can convert helpful replies into articles. The article type you select determines which fields appear on the draft article. However, on all articles the Title contains the question and the Summary contains the reply. After a reply is promoted to an article, the original reply has a status message indicating its association with the draft article. When the article is published, the message on the reply includes a link to the article.
Chatter Questions Settings	
Display relevant articles as users ask questions in Chatter (also applies to communities with Chatter)	Shows similar questions and relevant Salesforce Knowledge articles when a user enters a question in the Search field.
Knowledge Statistics Settings	
Enable thumbs up or down voting for article	With this option, the article VoteStat report (which by default only contains totals for star ratings) includes totals for the thumbs up or down ratings.

IN THIS SECTION:[Enable Knowledge One with Permission Sets](#)

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their permission sets.

[Enable Knowledge One with Profiles](#)

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their profiles.

[Example Apex for Submitting Articles from Cases](#)

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

[Use Videos from Any Provider with a Custom Visualforce Page](#)

Using a custom Visualforce page and the HTML editor, you can insert videos from any provider into your Salesforce Knowledge articles.

SEE ALSO:

[Build Your Knowledge Base in Salesforce Classic](#)

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Enable Knowledge One with Permission Sets

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their permission sets.

To add the `Knowledge One` permission to a permission set:

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Click the permission set you want to add the Knowledge One permission to.
3. In the `Find Settings...` box, enter `Knowledge`.
4. Select **Knowledge One** from the list of suggestions.
5. Click **Edit**.
6. Under `Knowledge Management`, check the Enabled check box for `Knowledge One`.
7. Click **Save**.
8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your [external data sources](#). Your external data sources appear under your articles both in the search results and the left-side panel.

SEE ALSO:

- [Enable Knowledge One with Profiles](#)
- [Build Your Knowledge Base in Salesforce Classic](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or edit permission sets:

- [Manage Profiles and Permission Sets](#)

To create and edit external data sources:

- [Customize Application](#)

Enable Knowledge One with Profiles

To switch users from the Articles tab to the Knowledge tab, add the Knowledge One permission to their profiles.

To add the Knowledge One permission to a profile:

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
2. Click the profile you want to add the Knowledge One permission to.
3. In the  **Find Settings...** box, enter *Knowledge*.
4. Select **Knowledge One** from the list of suggestions.
5. Click **Edit**.
6. Under Knowledge Management, check Knowledge One.
7. Click **Save**.
8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your [external data sources](#). Your external data sources appear under your articles both in the search results and the left-side panel.

SEE ALSO:

- [Enable Knowledge One with Permission Sets](#)
- [Build Your Knowledge Base in Salesforce Classic](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To create or edit profiles:

- Manage Profiles and Permission Sets

To create and edit external data sources:

- Customize Application

Example Apex for Submitting Articles from Cases

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

For more information on the syntax and use of Apex, see the [Lightning Platform Apex Code Developer's Guide](#).

Set up the example by creating the following article type, field, and data categories. Do not change the default `API Name` assigned to each new object.

1. [Create an article type](#) called `FAQ`.
2. [Create a text custom field](#) called `Details`.
3. [Create a category group](#) called `Geography` and [assign it a category](#) called `USA`.
4. [Create a category group](#) called `Topics` and [assign it a category](#) called `Maintenance`.
Now, create and assign the Apex class.
5. From Setup, enter `Apex Classes` in the `Quick Find` box, then select **Apex Classes** and click **New**.
6. To specify the version of Apex and the API used with this class, click **Version Settings**.
If your organization has installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this class. Use the default values for all versions. This associates the class with the most recent version of Apex and the API, as well as each managed package. You can specify an older version of a managed package if you want to access components or functionality that differs from the most recent package version. You can specify an older version of Apex and the API to maintain specific behavior.
7. In the `Apex Class` text box enter the following script and click **Save**:

```
public class AgentContributionArticleController {
    // The constructor must take a ApexPages.KnowledgeArticleVersionStandardController
    as an argument
    public
    AgentContributionArticleController(ApexPages.KnowledgeArticleVersionStandardController
    ctl) {
        SObject article = ctl.getRecord(); //this is the SObject for the new article.

        //It can optionally be cast to the proper
        article type, e.g. FAQ__kav article = (FAQ__kav) ctl.getRecord();

        String sourceId = ctl.getSourceId(); //this returns the id of the case that was
        closed.
        Case c = [select subject, description from Case where id=:sourceId];

        article.put('title', 'From Case: '+c.subject); //this overrides the default
        behavior of pre-filling the title of the article with the subject of the closed case.
        article.put('Details__c',c.description);

        ctl.selectDataCategory('Geography','USA'); //Only one category per category
        group can be specified.
```

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To edit Salesforce Knowledge settings:

- [Customize Application](#)

To create an Apex class:

- [Author Apex](#)

```
ctl.selectDataCategory('Topics', 'Maintenance');  
}
```

8. From Setup, enter *Knowledge Settings* in the Quick Find box, then select **Knowledge Settings** and click **Edit**.
9. Verify the [case settings](#); using our example, the **Default article type** should be FAQ.
10. From the Use Apex Customization menu, select **AgentContributionArticleController** and click **Save**.

As a result of this example, when agents create an article from the case-close screen:

- The data from the `Description` field on the case appears in the `Details` field of the article.
- The title of the article contains *From Case:* and the case subject.
- The article is automatically assigned to the *USA* data category and the *Maintenance* data category.

SEE ALSO:

- [Build Your Knowledge Base in Salesforce Classic](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Use Videos from Any Provider with a Custom Visualforce Page

Using a custom Visualforce page and the HTML editor, you can insert videos from any provider into your Salesforce Knowledge articles.

For example, create a Visualforce page:

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create a Visualforce page

- Customize Application

To create articles:

- Manage Articles

AND

Read and Create on the article type

To edit draft articles:

- Manage Articles

AND

Read and Edit on the article type

To edit published or archived articles:

- Manage Articles

AND

Create, Read, and Edit on the article type

```
<apex:page showHeader="false" showChat="false" sidebar="false">
  <iframe width="560" height="315"
    src="http://myvideo.provider.com/embed/{!$CurrentPage.parameters.VideoID}"
    frameborder="0" allowfullscreen="true">
```

```
</iframe>
</apex:page>
```

Then, with the HTML editor, authors can reference videos using this code:

```
<iframe frameborder="0" height="315"
  src="https://<salesforce_instance>/apex/Video?videoID=12345"
  width="560">
</iframe>
```

SEE ALSO:

- [Build Your Knowledge Base in Salesforce Classic](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Knowledge Article Types

Article types, such as FAQs and Tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

IN THIS SECTION:

[Create Article Types](#)

An article type controls how an article displays and what type of information of fields are included.

[Add Custom Fields to Article Types](#)

Create custom fields to store information that is important to your articles. The only standard fields provided on article types are: Article Number, Summary, Title, and URL Name. At minimum, you want to create a field where authors can write the body of the article.

[Article Type Page Layouts](#)

Article-type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. The article-type template defines the format of the article, for example whether layout sections display as subtabs or as a single page with links. You can apply a layout per profile per article type. Therefore, you can display more sensitive fields of the same article to only those agents with the correct profile.

[Control Data Integrity with Validation Rules](#)

Ensure that your article content is compliant with your company standards. Create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

[Article History Tracking](#)

You can track the history of certain fields in articles. If you have history tracking enabled, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

EDITIONS

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Article Type Templates

Article types in Salesforce Knowledge require a template for each channel. The standard article-type templates—Tab and Table of Contents—specify how the sections in the article-type layout appear in the published article. For example, if you choose the Tab template, the sections defined in the layout appear as tabs when users view an article. With the Table of Contents template, sections appear on a single page with hyperlinks to each section. You can also create a custom template using Visualforce. Custom templates are not associated with the article-type layout.

Delete an Article Type

Deleting article types can result in errors and lost data. Read this entire topic carefully before deleting article types.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create Article Types

An article type controls how an article displays and what type of information of fields are included.

 **Note:** Before agents can access article types, you must set object permissions for article types.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Click **New Article Type** or edit an existing article type.
3. Enter the article types details

Field	Description
Label	A name used to refer to the article type in any user interface pages.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.
Starts with a vowel sound	If it is appropriate for your organization's default language, check if your label should be preceded by "an" instead of "a".

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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USER PERMISSIONS

To create, edit, or delete article types:

- Customize Application
- AND
- Manage Salesforce Knowledge

Field	Description
Object Name	(Read only) A unique name used to refer to the article type when using the Lightning Platform API. In managed packages, this unique name prevents naming conflicts on package installations. The Object Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	An optional description of the article type. A meaningful description helps you remember the differences between your article types when you are viewing them in a list.
Track Field History	Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations.
Deployment Status	Indicates whether the article type is visible outside Setup. In Development means that article managers can't choose this article type when creating articles. Only select Deployed after you are done creating the article type.

4. Click **Save**.

On the article type detail page,

- In the Fields related list, [create or modify custom fields](#) as needed.
- In the Fields related list, [edit the article-type layout](#) as needed to rearrange fields and create sections.
- In the Channel Displays related list, [choose a template](#) for the Internal App, Partner, Customer, and Public Knowledge Base.

SEE ALSO:

[Add Custom Fields to Article Types](#)

[Article Type Page Layouts](#)

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Add Custom Fields to Article Types

Create custom fields to store information that is important to your articles. The only standard fields provided on article types are: Article Number, Summary, Title, and URL Name. At minimum, you want to create a field where authors can write the body of the article.

Before you begin, determine the [type of custom field](#) you want to create.

 **Note:** Authors can view the `URL Name` when they create or edit an article. The `URL Name` does not appear to end users viewing published articles.

1. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.
2. Select an article type.
3. Click **New** in the Fields related list.
4. Choose the type of field to create, and click **Next**.
5. Enter a field label. The field name is automatically populated based on the field label you enter. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
6. Enter any field attributes, such as `Description`, and click **Next** to continue.

 **Note:** You cannot enter a default value for any custom field.

7. Set the [field-level security](#) to determine whether the field is visible and editable or read only for specific profiles, and click **Next**. Field-level security allows you to control which fields are visible in different channels.
8. If you do not want the field to be added automatically to the article-type layout, uncheck `Yes, add this custom field to the layout`.
9. Click **Save** to finish or **Save & New** to create more custom fields.
10. Optionally [rearrange your custom fields](#) on the article-type layout.

 **Note:** Creating fields can require changing many records at once. To process these changes efficiently, Salesforce might queue your request and send an email notification when the process has completed.

 **Warning:** You lose your data if you convert a custom field on an [article type](#) into any other field type. Do not convert a custom field on an article type unless no data exists for the field.

IN THIS SECTION:

[Custom Fields on Articles](#)

The first step in creating a custom field for articles is choosing the field type. This table describes all available custom field types.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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USER PERMISSIONS

To create or change custom fields:

- Customize Application AND Manage Salesforce Knowledge

Field-Level Security on Articles

Field-level security lets administrators restrict readers' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for public Community profiles.

SEE ALSO:

[Create Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Custom Fields on Articles

The first step in creating a custom field for articles is choosing the field type. This table describes all available custom field types.

Field Type	Description
Article Currency	In a multiple currency organization, an article can have an article currency field to set the article's currency ISO code.
Currency	<p>Allows agents to enter a currency amount. The system automatically formats the field as a currency amount. This can be useful if you export data to a spreadsheet application. You can make this field required so an agent must enter a value before saving an article.</p> <p> Note: Salesforce uses the round-half-to-even tie-breaking rule for currency fields. For example, 23.5 becomes 24, 22.5 becomes 22, -22.5 becomes -22, and -23.5 becomes -24. Values lose precision after 15 decimal places.</p>
Date	Allows agents to enter a date or pick a date from a popup calendar. In reports, you can limit the data by specific dates using any custom date field. You can make this field required so an agent must enter a value before saving an article.
Date/Time	Allows agents to enter a date or pick a date from a popup calendar, and enter a time of day. They can also add the current date and time by clicking the date and time link next to the field. The time of day includes AM or PM notation. In reports, you can limit the data by specific dates and times using any custom date field. You can

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Field Type	Description
Email	<p>make this field required so an agent must enter a value before saving an article.</p> <p>Allows agents to enter an email address, which is validated to ensure proper format. Character limit is 80. If this field is specified for contacts or leads, agents can choose the address when clicking Send an Email. You can't use custom email addresses for mass emails. You can make this field required so an agent must enter a value before saving an article.</p>
File	<p>Allows agents to upload and attach a file to an article. You can make this field required so an agent must enter a value before saving an article. Note the following caveats about File fields:</p> <ul style="list-style-type: none"> • The maximum attachment size is 25 MB. • You can add up to 5 File fields to each article type; contact Salesforce to increase these limits. • If the <code>Disallow HTML documents and attachments</code> security setting is enabled, File fields do not support HTML files. • Text content in a File field attachment is searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5-MB file attachments, the first 4.16 MB of each file is searchable. • You cannot attach Salesforce CRM Content files using the File field. • The File field type is not supported in Developer edition. • The filename cannot exceed 40 characters. • You cannot convert a File field type into any other data type.
Formula	<p>Allows agents to automatically calculate values based on other values or fields such as merge fields.</p> <p> Note: Salesforce uses the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.34.</p> <p>In Database.com, the Formula editor does not provide a Check Syntax button. Syntax checking occurs when the agent attempts to save the formula.</p>
Lookup Relationship	<p>Creates a relationship between two records so you can associate them with each other. For example, opportunities have a lookup relationship with cases that lets you associate a particular case with an opportunity. A lookup relationship creates a field that allows agents to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all the records that are linked to it. You can</p>

Field Type	Description
	<p>create lookup relationship fields that link to users, standard objects, or custom objects. If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship. You can make this field required so an agent must enter a value before saving an article.</p> <p>Lookup relationship fields are not available in Personal Edition.</p> <p>Lookup relationship fields to campaign members are not available; however, lookup relationship fields from campaign members to other objects are available.</p>
Number	<p>Allows agents to enter any number. This entry is treated as a real number and any leading zeros are removed. You can make this field required so an agent must enter a value before saving an article.</p> <p> Note: Salesforce uses the round half up tie-breaking rule for number fields. For example, 12.345 becomes 12.35 and -12.345 becomes -12.34. Salesforce rounds numbers referenced in merge fields according to the user's locale, not the number of decimal spaces specified in the number field configuration.</p>
Percent	<p>Allows agents to enter a percentage number, for example, '10'. The system automatically adds the percent sign to the number. You can make this field required so an agent must enter a value before saving an article.</p> <p> Note: If the decimal value is greater than 15, and you add a percent sign to the number, a runtime error occurs.</p> <p>Values lose precision after 15 decimal places.</p>
Phone	<p>Allows agents to enter any phone number. Character limit is 40. You can make this field required so an agent must enter a value before saving an article.</p> <p>Salesforce automatically formats it as a phone number.</p>
Picklist	Allows agents to select a value from a list you define.
Picklist (Dependent)	Allows agents to select a value from a list dependent on the value of another field.
Picklist (Multi-select)	Allows agents to select more than one picklist value from a list you define. These fields display each value separated by a semicolon.
Text	Allows agents to enter any combination of letters, numbers, or symbols. You can set a maximum length, up to 255 characters. You

Field Type	Description
	can make this field required so an agent must enter a value before saving an article.
Text Area	Allows agents to enter up to 255 characters that display on separate lines similar to a <code>Description</code> field. You can make this field required so an agent must enter a value before saving an article.
Text Area (Long)	<p>Allows agents to enter up to 131,072 characters that display on separate lines similar to a <code>Description</code> field. You can set the length of this field type to a lower limit, if desired. Any length from 256 to 131,072 characters is allowed. The default is 32,768 characters. Every time a agents presses <code>Enter</code> within a long text area field, a line break and a return character are added, both count toward the character limit. Also, smart links add more characters than what is displayed.</p> <p> Note: If you lower the character limit and you have articles that surpass the new limit. Those articles can't be edited until the limit is reset higher than their character counts.</p>
Text Area (Rich)	<p>Allows agents to enter up to 131,072 characters of HTML-supported text including code samples () and smart links between Salesforce Knowledge articles.</p> <p>There are two ways to create smart links:</p> <ul style="list-style-type: none"> • Search for the article. • Enter the article URL. <p> Note:</p> <ul style="list-style-type: none"> • You can have up to 100 links to different Salesforce Knowledge articles in one rich text field. • When you convert a text area (rich) field to a text area (long) field, links are displayed as link reference numbers, not URLs. • The upgraded editor doesn't support Internet Explorer version 7 or version 8 in compatibility mode. If you are using these browsers, you use the older editor.
URL	Allows agents to enter up to 255 characters of any valid website address. When agents click the field, the URL opens in a separate browser window. Only the first 50 characters are displayed on the

Field Type**Description**

record detail pages. You can make this field required so an agent must enter a value before saving an article.

SEE ALSO:

- [Add Custom Fields to Article Types](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Field-Level Security on Articles

Field-level security lets administrators restrict readers' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for public Community profiles.

If using both [article-type layout](#) and field-level security to define field visibility, the most restrictive field access setting always applies. For example, if a field is hidden in the article-type layout, but visible in the field-level security settings, the layout overrides security settings and the field aren't visible. Some user permissions override both page layouts and field-level security settings. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings.

-  **Important:** Field-level security doesn't prevent searching on the values in a field. When search terms match on field values protected by field-level security, the associated records are returned in the search results without the protected fields and their values.

You can define security via a permission set, profile, or field.

Define field-level security via permission sets or profiles

1. For permission sets or profiles, from Setup, either:
 - Enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**, or
 - Enter *Profiles* in the **Quick Find** box, then select **Profiles**
2. Select a permission set or profile.
3. Depending on which interface you're using, do one of the following:
 - Permission sets or enhanced profile user interface—In the **Find Settings...** box, enter the name of the object you want and select it from the list. Click **Edit**, then scroll to the Field Permissions section.
 - Original profile user interface—In the Field-Level Security section, click **View** next to the object you want to modify, and then click **Edit**.

 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

EDITIONS

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Define field-level security via fields

1. For fields, from Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Select the article type that contains the field to modify.
3. Select the field and click **Set Field-Level Security**.
4. Specify the field's access level.

 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

After setting field-level security, you can [modify the article-type layouts](#) to organize the fields on detail and edit pages.

SEE ALSO:

[Add Custom Fields to Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Article Type Page Layouts

Article-type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. The article-type template defines the format of the article, for example whether layout sections display as subtabs or as a single page with links. You can apply a layout per profile per article type. Therefore, you can display more sensitive fields of the same article to only those agents with the correct profile.

 **Tip:** You can also use [field-level security](#) to hide fields on article types. For example, if you publish the same article in the internal app and in a community, you can use field-level security to hide a custom field such as *Internal Comments* from external community users.

1. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Click the article type.
3. Scroll down to the Page Layouts related list or click the Page Layouts link at the top of the page.
4. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.

Make your changes. The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

 **Important:** If you navigate away from your article-type layout before clicking save, your changes are lost.

 **Note:** The *Article Number*, *Summary*, *Title*, and *URL Name* standard fields do not display in the layout. *Article Number* and *Summary* appear in a read-only

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USER PERMISSIONS

To customize the article-type layout:

- [Customize Application](#)

Properties section at the top of the published article. Also included in this header are the `First Published`, `Last Modified`, and `Last Published` fields.

Task	Description
Add a section	Drag and drop the section element into the palette.
Change the name of a section	Click its title. You cannot rename the Information section.
Remove a field from a section	Drag it to the right side of the palette or click the  icon next to the field.
Remove a section from the article-type layout	Click the  icon next to the section name.
Save your changes and continue editing the article type layout	Click Quick Save .

 **Tip:**

- Use the undo and redo buttons to step backwards and forwards, respectively.
- Use the following keyboard shortcuts:
 - Undo = CTRL+Z
 - Redo = CTRL+Y
 - Quick Save = CTRL+S
- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.
- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for article-type layouts that have large numbers of items available in the palette.

5. To assign various layouts to the article type based on a user profile, click **Page Layout Assignments**.

6. Click **Edit Assignment**.

7. Select the profile, or profiles (using SHIFT), you want to change and select the layout from the **Page Layout To Use** drop-down.

When creating multiple article type page layouts, consider the following limitations and functionality changes.

- When creating page layouts, some fields are hidden based on the agent's license. Out of Date, Translation Completed Date, and Translation Exported Date are hidden from users who do not have a Knowledge User license or who are customer portal or partner portal users. In addition, Archived By and Is Latest Version are hidden from customer portal and partner portal users.
- Before Spring '16, preview pages showed the Summary field in the API that contained text values, even if they were not in the page layout. To continue displaying summary fields on preview pages, manually update your page layouts to include them.
- If you want to attach articles as PDFs to emails when solving cases, add **File Attachments** to the `Selected Email Tools` in the Feed View for the article type layout.
- The article edit page only shows the standard fields (Article Number, Title, URL Name, and Summary) and all the custom fields added to the layout, including the side bar fields. Other standard fields added on the page layout are ignored because they are not editable, and the custom fields are displayed in the order specified in the page layout.
- If an article type page layout doesn't include a field with a [validation rule](#), you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.
- The Communication channel layout doesn't use the page layout to determine which Article fields are inserted into a case email. The fields that are inserted include the fields selected in the Communication Channel mapping.

- You can set up a specific profile to generate a PDF file. When sending articles as PDFs, the pdf is generated based on the sender's profile. Therefore, the receiver might get fields they are not meant to see. Use the `Use a profile to create customer-ready article PDFs on cases` setting on the Knowledge settings page so the fields in PDFs come from the page layout assigned to the configured profile. Also, Field Level Security of both the sender profile and the configured profile are applied.

IN THIS SECTION:

[Send Article Content in Email](#)

When using Knowledge One, agents can send an email with an article's contents embedded in the body of the email.

[Post Site and Community Article URLs](#)

In the Service Console, agents can insert Site or Community URLs for articles into the case feed via the email, community, or social publishers.

SEE ALSO:

[Create Article Types](#)

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Send Article Content in Email

USER PERMISSIONS

To administer Salesforce Knowledge and create, edit, and delete page layouts:

Customize Application

AND

Manage Salesforce Knowledge

To send article content in emails in Lightning Knowledge:

Edit on cases

AND

View Setup and Configuration

AND

Enable, "Share internal Knowledge articles externally"

AND

Enable, "Attaching articles inline"

AND

SendEmail action should be present in the Case layout

AND

HTML or Text should be present in the SendEmail layout

AND

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

 Enable CommChannelLayout for email

To send article content in emails in Classic Knowledge:

Edit on cases

AND

Enable, "Share internal Knowledge articles externally"

AND

Enable, "Attaching articles inline"

AND

SendEmail Action should be present in the Case layout

When using Knowledge One, agents can send an email with an article's contents embedded in the body of the email.

Agents can send article content within an email rather than just sending a URL. Your customers can access the information without going to a website. Your agents send articles that are not published publicly without rewriting or copy and pasting an internal article. Administrators can assign permissions to only those agents with a good knowledge of what is acceptable for an external audience.

To enable and setup which article fields go into emails for each article type.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose `Edit detail view` to add, change, or remove actions.

3. Under `Articles Tool Settings`, check **Enable attaching articles inline**.
4. Under `Administrative Permissions`, check **Share internal Knowledge articles, externally**.
5. Click **Save**.
6. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.
7. Click the label or name of the article type you'd like to share via email.
8. Under `Communication Channel Mappings`, click **New** or **Edit**.
9. Enter a Label and Name.
10. Select and add `Email` to the Selected Channels list.
11. Select and add the fields you'd like included in the body of an email.



Note: Smart links can't be included in the email and the following fields are not supported:

- `ArticleType`
- `isDeleted`
- `Language`
- `MultiPicklist`
- `Picklist`
- `Publish Status`

- Source
- Validation Status

12. Click Save.



Example: While solving customer cases, agents with the permission can insert article content into the body of an email. Anywhere agents can attach articles to cases, such as the Knowledge One sidebar in the Salesforce Console, the Articles list in the case feed, the Article widget, or the suggested articles in a Knowledge One search, they can email any article of that type within the body of an email by selecting **Email article with HTML** in the action drop-down. The article content is inserted at top of email thread or wherever the agent left their cursor. Once an article has been emailed, an envelope icon appears to the left of the title. When the article has files that exceed the 10-mb attachment limit, agents are asked to select which files to attach and retry sending the email.



Note: If rich text is not enabled on your case feed layout for the article type, only article text is embedded into the email and the action changes to **Email article text only**.

SEE ALSO:

[Article Type Page Layouts](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Post Site and Community Article URLs

In the Service Console, agents can insert Site or Community URLs for articles into the case feed via the email, community, or social publishers.

To post Site or Community URLs for articles into the case feed, you must have the [Knowledge sidebar enabled in the Service Console](#) and either a [Salesforce Site](#) or [Community](#) setup.

1. From Setup, enter *Knowledge* in the *Quick Find* box, then select **Knowledge Settings**.
2. Click **Edit**.
3. In the *Share Article via URL Settings* section, enable **Allow users to share articles via public URLs**.
4. In the *Available Sites* list, select from which sites or communities you want agents to share article URLs and add them to the *Selected Sites* list.
5. Click **Save**.

Your agents can now select **Attach and share article** link from selected sites in the Knowledge sidebar of the console. Email is the default action but agents can change to the Social or Community action in the case feed before they insert the URL.

Important:

- Articles must be published. Draft articles don't show the insert URL option.
- Articles must be shared publicly, meaning their Channel must be Public Knowledge Base, Customer, or Partner.
- All enabled URLs show **Attach and share article** link, even if the article is not visible in that site or community. The agent must confirm that the article is available in the site or community before sharing it with the customer.

SEE ALSO:

- [Article Type Page Layouts](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To administer Salesforce Knowledge:

- **Customize Application**
AND
Manage Salesforce Knowledge

Control Data Integrity with Validation Rules

Ensure that your article content is compliant with your company standards. Create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

1. From Setup, enter *Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Click the article type.
3. Scroll down to the Validation Rules related list or click the **Validation Rules** link at the top of the page.
4. To create a validation rule, click **New**. To edit an existing rule, click **Edit**.
5. Name the rule.
6. Make the rule active.
7. Optionally, describe what you want to control on articles of this type.
8. Specify an error condition formula and a corresponding error message.

The error condition is written as a Boolean formula expression that returns true or false. When true, the article is not saved, and an error message displays. The author can correct the error and try again. For information on validation rules, see [Define Validation Rules](#).



Note: Knowledge article errors always display at the top of the page, not next to the field. Write your errors descriptively so that authors know how to satisfy the validation rule. For example, identify which field is causing the error.

9. Click **Save**.

When creating validation rules on article types, consider the following limitations and functionality changes.

- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all [page layouts assigned to the article type by profile](#) include all fields with validation rules.
- The Article Currency field and the VLOOKUP function don't support validation rules.
- When importing articles, if the import data file has a valid article with an invalid translation, the translation is created, but its translated content isn't imported.
- Only the first validation rule error displays at the top of the page and in the import article log. If multiple errors exist but are not fixed, they are displayed on subsequent saves or imports.
- In the API, KA fields, such as Case Association Count and Archived Date, don't support validation rules. Only KAV (article version) fields are supported in validation rules.

SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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USER PERMISSIONS

To create or edit validation rules for article types:

- **Customize Application**
AND
Manage Salesforce Knowledge

Article History Tracking

You can track the history of certain fields in articles. If you have history tracking enabled, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations. When you track old and new values, the system records both values as well as the date, time, nature of the change, and the user who made the change. When you track only the changed values, the system marks the changed field as having been edited; it doesn't record the old and new field values. This information is available in the Version History list and the fields are available in the Article Version History report.

Article history respects field, entity, and record-level security. You must have at least "Read" permission on the article type or the field to access its history. For data category security, Salesforce determines access based on the categorization of the online version of an article. If there is no online version, then security is applied based on the archived version, followed by the security of the draft version.

1. From Setup, enter *Knowledge* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Create an article type or edit one from the Article Types list.
3. Click **Set History Tracking**.
4. Choose the fields you want to track.
Salesforce begins tracking history from that date and time. Changes made before that date and time are not tracked.
5. Click **Save**.

SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create, edit, or delete article types:

- **Customize Application**
AND
Manage Salesforce Knowledge

Article Type Templates

Article types in Salesforce Knowledge require a template for each channel. The standard article-type templates—Tab and Table of Contents—specify how the sections in the article-type layout appear in the published article. For example, if you choose the Tab template, the sections defined in the layout appear as tabs when users view an article. With the Table of Contents template, sections appear on a single page with hyperlinks to each section. You can also create a custom template using Visualforce. Custom templates are not associated with the article-type layout.

1. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Click an article type name.
 - If you are using a default template, continue with Step 12.
 - If you are creating a custom template, make note of the article type's **API Name**. You need this value when you create the Visualforce page.
3. From Setup, enter *Visualforce Pages* in the **Quick Find** box, then select **Visualforce Pages**.
4. Click **New**.
5. In the **Name** text box, enter the text that appears in the URL as the page name.
This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
6. In the **Label** text box, enter the text that users see when choosing this template from the Channel Displays related list on the article type detail page.
7. Add your Visualforce markup.
The only requirement for custom article-type templates is that the standard controller is equal to the **API Name** of the article type. For example, if the **API Name** of the article type is *Offer__kav*, your markup would be:

```
<apex:page standardController="Offer__kav">
    ... page content here ...
</apex:page>
```

 **Note:** Click **Component Reference** for a list of the Visualforce components, such as *knowledge:articleRendererToolbar* and *knowledge:articleCaseToolbar*, available for use in custom article-type templates.

8. If your article type has a **File field**, you can allow users to download the field's content.
In the following example, the article type is *Offer*, the name of the File field is *my_file*, and the text that appears as a link is *Click me*:

```
<apex:outputLink value="{!URLFOR($Action.Offer__kav.FileFieldDownload,
Offer__kav.id, ['field'=$ObjectType.Offer__kav.fields.my_file__Body__s.name])}">Click
me</apex:outputLink>
```

EDITIONS

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USER PERMISSIONS

To create, edit, or delete article-type templates:

- Customize Application
AND
Manage Salesforce Knowledge

 **Note:** If the File field is empty (meaning the author didn't upload a file), the link still appears on the published article but has no function. If you do not want the link to appear when the File field is empty, replace *Click me* in the example with the name of the file. For example, `{!Offer__kav.my_file__Name__s}`.

9. Click **Save**.

Your custom template can now be assigned to any channel on the article type.

10. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**

11. Click an article type name.

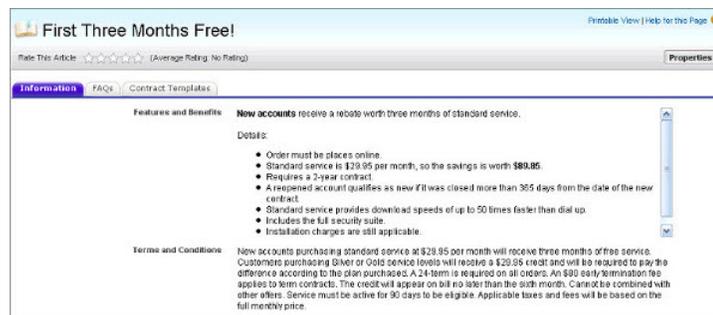
12. For each channel, specify the template.

- For Internal App, Customer and Partner, **Tab** is the default template.
- For Public Knowledge Base, **Table of Contents** is the default template.
- If you created a custom template for this article type, it also appears in the drop-down menu.

13. Click **Save**.

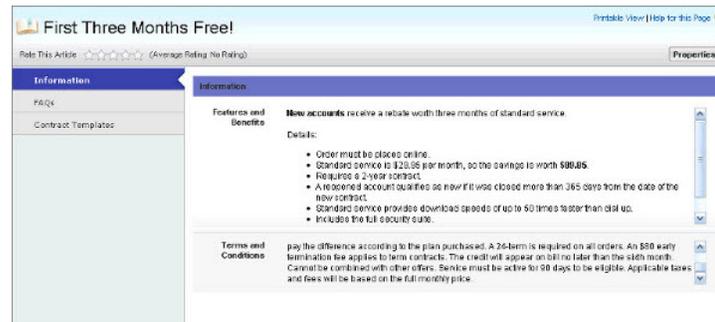
 **Example:** If you choose the Tab template, the sections you defined in the layout appear as tabs when users view an article.

Published Article Using the Tab Article-Type Template



If you choose the Table of Contents template, the sections you defined in the layout appear on one page with hyperlinks to each section title.

Published Article Using the Table of Contents Article-Type Template



SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Delete an Article Type

Deleting article types can result in errors and lost data. Read this entire topic carefully before deleting article types.

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.
2. Next to the article type, click **Del**.
3. Confirm that you want to delete the article type.

Notes on Deleting Article Types

- If your organization has only article type, you cannot delete it. Every Salesforce Knowledge org requires at least one deployed article type. Create an article type and then delete the old one.
- Any articles associated with a deleted article type are automatically removed from all channels, including draft, published, and archived articles.
- Salesforce does not display deleted article types in the Recycle Bin with other deleted records. Instead, deleted article types appear in the Deleted Article Types list on the article list view page for 15 days. During this time, you can restore the article type and its articles, or permanently erase the article type and its articles. After 15 days, the article type and its articles are permanently erased.
- If a reader clicks a bookmark to a deleted article's URL, an Insufficient Privileges message displays.

SEE ALSO:

[Knowledge Article Types](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To delete article types:

- Customize Application

Import Existing Information into Salesforce Knowledge

You can import your existing articles or information database into Salesforce Knowledge. This importer is for articles and translations you currently have outside Salesforce Knowledge. If you want to move your existing content from Classic to Lightning Knowledge, use the Lightning Knowledge Migration Tool.

 **Note:** If you are looking for instructions on importing translated articles that you've sent to a localization vendor, see [Import Translated Articles](#) on page 664.

IN THIS SECTION:

- [1. Prepare Articles for Import to Salesforce Knowledge](#)
Each import file must have articles of the same type and columns corresponding to the fields in the article.
- [2. Create a .csv File for Article Import](#)
Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.
- [3. Set Article Import Parameters](#)
Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.
- [4. Create an Article .zip File for Import](#)
To complete your article import, create a .zip file with your `.parameters`, `.csv`, and `.html` files, and upload them into Salesforce Knowledge.
- [5. Article and Translation Import and Export Status](#)
Find the status of your article imports and exports on the Article Imports page in Setup.

SEE ALSO:

[Lightning Knowledge Migration Tool \(Beta\)](#)
[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Prepare Articles for Import to Salesforce Knowledge

Each import file must have articles of the same type and columns corresponding to the fields in the article.

 **Tip:** Test your import using a small set of articles.

1. Sort your existing articles by information type.
For example: FAQ, product information, or offer.
2. Ensure that each information type has a corresponding [Salesforce Knowledge article type](#) that matches its structure and content.

For example, if you are importing FAQs, ensure that Salesforce Knowledge has an FAQ article type with enough question and answer fields to accommodate the largest FAQ article.

If your articles contain .html files, use an article type that contains a rich text area field and ensure that the HTML is compliant with the tags and attributes supported in the rich text area field.

 **Note:** The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.

3. Verify that the article's [field-level security settings](#) allow you to edit the fields.

For each article type, [create a cvs file](#) to import.

SEE ALSO:

- [Create a .csv File for Article Import](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To import articles:

- [Manage Salesforce Knowledge](#)
- AND
- [Manage Articles](#)
- AND
- [Manage Knowledge Article Import/Export](#)
- AND
- [Read, Create, Edit, and Delete on the article type](#)

Create a .csv File for Article Import

Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.

1. Create one .csv file per article type.
 - There can only be one .csv file and one .properties file.
 - The .csv file and the .properties file must be in the root directory.
 - The compression process must preserve the folder and subfolder structure.
 - The .zip file name can't contain special characters.
 - The .zip file can't exceed 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 MB.
 - .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
 - .csv file rows can't exceed 400,000 characters.
 - .csv file cells can't exceed 32 KB.
 - Each article in the .csv file can't have more than 49 translations.
2. In the first row, specify the article type's fields and metadata, such as language [data categories](#) or channels.

Enter one item in each column. You can use the following fields and metadata to import content.

Field or data	Description
<code>isMasterLanguage</code>	Identifies the article as a master (1) or translation (0). Required to import articles with translations, however, it can't be in a .csv file to import articles without translations. Translations must follow their master articles so that they are associated with the master article preceding it
<code>Title</code>	The article or translation's title. Required for all imports.
Standard and custom fields	Refer to an article type's standard fields using field names and refer to custom fields using API names. Leaving a row cell empty may cause your articles to be skipped if the related article type field is mandatory.
Rich text area field	Use the rich text area custom fields to import .html files or images. Refer to an article type's rich text area field using its API name.
File field	Use the file custom fields to import any file type (.doc, .pdf, .txt, etc.). Refer to an article type's file field using its API name.

EDITIONS

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USER PERMISSIONS

To import articles:

- Manage Salesforce Knowledge
- AND
- Manage Articles
- AND
- Manage Knowledge Article Import/Export
- AND
- Read, Create, Edit, and Delete on the article type

Field or data	Description
Data category groups	To categorize the imported articles, use category groups; refer to a category group using its unique name prefixed with <code>datacategorygroup.</code> . For example, use <code>datacategorygroup.Products</code> to specify the category group <code>Products</code> .
Channel	To specify where the imported articles are available, use the keyword <code>Channels</code> .
Language	Specify the articles' language. Required to import articles with translations. Optional to import articles without translations. If you don't include this column, the articles automatically belong to the default knowledge base language and you can't import translations along with the master articles.

3. In subsequent rows, specify the articles you want to import.

Use one row per article and enter the appropriate information in each field or metadata column.

 **Important:** All file names are case sensitive and must match what is in the .csv file exactly.

Consideration	Notes
Standard or custom fields	<p>Enter the articles' data for each field, except for rich text area fields where you must enter the relative path to the corresponding .html file in your .zip file.</p> <p> Note: The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.</p>
Rich text area field	<p>Always enter the .html file path relative to the location of the .csv file. Never enter raw text. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing HTML and images.</p> <ul style="list-style-type: none"> • We recommend that you create separate folders for the .html files (for example, <code>/data</code>) and the images (for example, <code>data/images</code>). • To import images, include the images in an .html file using the <code></code> tag and <code>src</code> attribute. Ensure that the <code>src</code> value is a relative path from the .html file to the image folder. • Images must be <code>.png</code>, <code>.gif</code>, or <code>.jpeg</code> files. • Each image file can't exceed 1 MB. • .html files can't exceed the maximum size for their field. • If a date doesn't match the date format specified in the property file, the related article isn't imported.

Consideration	Notes
	<ul style="list-style-type: none"> • If an .html file references a file that isn't allowed, the related article isn't imported. • If an .html file references an image that's missing, the related article is imported without the image.
File field	<p>Enter the path relative to the file's location. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing files.</p> <ul style="list-style-type: none"> • We recommend that you create a folder for your files (for example, /files). • Each file must not exceed 5 MB.
Category groups	<p>Use category unique names to categorize articles. Use the plus symbol (+) to specify more than one category. For example, Laptop+Desktop. Note the following information about data category groups.</p> <ul style="list-style-type: none"> • Leaving the cell row empty causes your article to be set to No Categories. • If you specify a category and its parent (for example, Europe+France) the import process skips the child category France and keeps the parent category Europe, because application of a parent category implicitly includes the category's children. • When importing articles with translations and associated data categories, only the master article retains the data categories. The article translations have no associated data category upon import.
Channels	<p>Specify articles' channels using the keywords.</p> <ul style="list-style-type: none"> • <code>application</code> for Internal App. If you don't specify a channel, <code>application</code> is the default. • <code>sites</code> for Public Knowledge Base. • <code>csp</code> for Customer. • <code>prm</code> for Partner. <p>Use the plus (+) symbol to specify more than one channel (for example, <code>application+sites+csp</code> to make an article available in all channels).</p> <p> Note: When importing articles with translations and associated channels, only the master article retains the channels. The article translations have no associated channels upon import.</p>

 **Example:** The following example .csv files import articles in a Product Offer article type. The first example is for imports of articles without translations. The second is for imports with translations. The .csv files contain titles, summaries, and descriptions. They also classify the articles in the category group Products and make them available for specific channels. The `description__c` field is a rich text area and only supports paths to .html files. The `summary__c` field is a text field and only supports raw text. The “Best Desktop Computer Deals” article has no summary; the cell is left blank because the `summary__c` field is not mandatory.

Title	summary__c	description__c	datacategorygroup .Products	Channels
Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp
Best Desktop Computer Deals		data/bestdeals.html	Desktop	application+csp
Free Shipping on Laptop and Desktops		data/freeship.html	Laptop+Desktops	application+csp

Example `articlesimport.csv` file:

```
Title,summary__c,description__c,datacategorygroup.Products,Channels
Free Digital Camera Offer, Get the new Digital
Camera.,data/freecam.html,Consumer_Electronics,application+csp
Best Desktop Computer Deals,,data/bestdeals.html,Desktop,application+csp
Free Shipping on Laptop and Desktops,,data/freeship.html,Laptop+Desktops,application+csp
```

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language
1	Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp	en_US
0	Libérer l'Offre d'Appareil photo digital	Obtenir le nouvel Appareil photo digital.	data/freecam/fr.html			fr
0	Liberte Oferta Digital de Cámara	Consigna la nueva Cámara Digital.	data/freecam/es.html			es
1	Best Desktop Computer Deals		data/bestdeals.html	Desktops	application+csp	en_US
0	Meilleures Affaires d'ordinateurs de bureau		data/bestdeals/fr.html			fr
0	Mejores Tratos de ordenadores		data/bestdeals/es.html			es
1	Free Shipping on Laptops and Desktops		data/freeship.html	Laptops+ Desktops	application+csp	en_US
0	Libérer Affranchissement sur Portables et Ordinateurs		data/freeship/fr.html			fr

isMaster Language	Title	summary__c	description__c	datacategorygroup.Products	Channels	Language
0	Liberte Franqueo en Laptops y Ordenadores		data/freeship/es.html			es

Example articlestranslationsimport.csv file:

```
isMasterLanguage,Title,summary__c,description__c,datacategorygroup.Products,Channels,Language
1,Free Digital Camera Offer,Get the new Digital
Camera,data/freecam.html,Consumer_Electronics,application+csp,en
0,Libérer l'Offre d'Appareil photo digital,Obtenir le nouvel Appareil photo
digital.,data/freecam/fr.html,,,fr
0,Liberte Oferta Digital de Cámara,Consiga la nueva Cámara
Digital.,data/freecam/es.html,,,es
1,Best Desktop Computer Deals,,data/bestdeals.html,Desktops,application+csp,en
0,Meilleures Affaires d'ordinateurs de bureau,,data/bestdeals/fr.html,,,fr
0,Mejores Tratos de ordenadores,,data/bestdeals/es.html,,,es
1,Free Shipping on Laptop and
Desktops,,data/freeship.html,Laptops+Desktops,application+csp,en
0,Libérer Affranchissement sur Portables et Ordinateurs,,data/freeship/fr.html,,,fr
0,Liberte Franqueo en Laptops y Ordenadores,,data/freeship/es.html,,,es
```

Specify your [import parameters](#) in a property file using key names and corresponding values.

SEE ALSO:

- [Set Article Import Parameters](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Set Article Import Parameters

Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.

1. Create a file with required parameters, as described in this table.

Key	Description	Default Value
<code>DateFormat</code>	Format of the date to read in the .csv file	<code>yyyy-MM-dd</code>
<code>DateTimeFormat</code>	Format of the date and time to read in the .csv file	<code>yyyy-MM-dd HH:mm:ss</code>
<code>CSVEncoding</code>	Character encoding used to read the .csv file	<code>ISO8859_15_FDIS</code>
<code>CSVSeparator</code>	.csv file separator	<code>,</code>
<code>RTAEncoding</code>	Default encoding used for the HTML files (if not specified in the <code>charset</code> attribute from the HTML <code>meta</code> tag).	<code>ISO8859_15_FDIS</code>

 **Note:** Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use specify UTF-16 character encoding, ensure that your HTML files specify the right byte-order mark.

 **Note:** Specify only Java date formats. Make sure the date format is not misleading. For example, if you choose the format `yyyy-M-d`, a date entered as `2011111` can be interpreted as `2011-01-11` or `2011-11-01`. Specify at least:

- Two digits for month and day format (MM, dd)
- Four digits for year format (yyyy)

If a date in the .csv file does not match the date format specified in the property file, the related article is not imported.

2. Save the file with the `.properties`.

EDITIONS

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USER PERMISSIONS

To import articles:

- Manage Salesforce Knowledge
- AND
- Manage Articles
- AND
- Manage Knowledge Article Import/Export
- AND
- Read, Create, Edit, and Delete on the article type

 **Example:** Example offerarticlesimport.properties property file:

```
DateFormat=yyyy-MM-dd
DateTimeFormat=yyyy-MM-dd HH:mm:ss
CSVEncoding=ISO8859_15_FDIS
CSVSeparator=,
RTAEncoding=UTF-8
```

Create a [.zip file](#) and import into Salesforce Knowledge.

SEE ALSO:

- [Create an Article .zip File for Import](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Create an Article .zip File for Import

To complete your article import, create a .zip file with your `.parameters`, `.csv`, and `.html` files, and upload them into Salesforce Knowledge.

1. Create a .zip file containing:

- The `.csv` file.
- The folder containing the `.html` files to import.
- The folder containing the image files referenced in the `.html` files.
- The `.properties` file.

 **Important:** The import .zip file must meet the following requirements:

- There can only be one `.csv` file and one `.properties` file.
- The `.csv` file and the `.properties` file must be in the root directory.
- The compression process must preserve the folder and subfolder structure.
- The `.zip` file name can't contain special characters.
- The `.zip` file can't exceed 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 MB.
- `.csv` files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
- `.csv` file rows can't exceed 400,000 characters.
- `.csv` file cells can't exceed 32 KB.
- Each article in the `.csv` file can't have more than 49 translations.

2. From Setup, enter `Import Articles` in the `Quick Find` box, then select **Import Articles**.

3. Select the appropriate **Article Type** for the imported articles.

4. To select the .zip file, click **Browse**, and then click **OK**.

5. If your import contains translations, select the `Contains translations?` checkbox.

 **Note:** If this checkbox is selected, your `.csv` file must contain the `isMasterLanguage`, `Title`, and `Language` columns. If this checkbox is not selected, your `csv` file can't contain the `isMasterLanguage` column but must contain the `Title` column. The `Language` column is optional for imports of articles without translations.

6. Click **Import Now**.

When the import is complete, you receive an email with an attached log that provides details about the import.

Check on the [status of your import](#), on the Article Imports page.

SEE ALSO:

- [Article and Translation Import and Export Status](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To import articles:

- Manage Salesforce Knowledge
- AND
- Manage Articles
- AND
- Manage Knowledge Article Import/Export
- AND
- Read, Create, Edit, and Delete on the article type

Article and Translation Import and Export Status

Find the status of your article imports and exports on the Article Imports page in Setup.

To check the status of your imports and exports, from Setup, enter *Article Imports* in the *Quick Find* box, then select **Article Imports**. If you've enabled multiple languages for Salesforce Knowledge, you see two tables: one for article and translation imports and another for exports for translation.

Import information includes:

- Possible actions
- .Zip file names
- Who submitted it and when
- Status
- Started and completed dates
- Article types

Export information includes:

- Possible actions
- Zip file names
- Who submitted it and when
- Status
- Started and completed dates

Status descriptions are as follows:

Status	Description	Possible Action
Pending	The import or export will start as soon as the previous pending import or export completes.	You can click Cancel to cancel the import or export.
Processing	The import or export is processing.	If you want to stop the process, or if the process has been stopped, call Salesforce Support. Salesforce may stop an import or export if a maintenance task has to be performed or the import or export exceeds one hour.
Stopping/Stopped	Salesforce Support is stopping or has already stopped the import or export.	Contact Salesforce Support to restart the import or export, or click Cancel to cancel an entry.
Aborted	The import or export has been canceled. The articles that already imported or exported successfully are available in Salesforce.	You can restart an import or export, click Del to delete an entry, or click Email Log to receive the completion email and check the details of your import or export.
Completed	The import or export is complete. Successfully imported articles are visible on the Article Management tab on the	This status doesn't mean the import or export is successful. Click Email Log to see the log file attached to the completion email

EDITIONS

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Status	Description	Possible Action
	Articles subtab. Successfully imported translations are visible on the Article Management tab on the Translations subtab.	and check the details of your import or export. Click the exported .zip file name to save or open the file on your system.

SEE ALSO:

- [Import Translated Articles](#)
- [Import Existing Information into Salesforce Knowledge](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Classic Knowledge User Access

Specify which agents in your company are Classic Knowledge users and give them access to article actions. Create user profiles with the user permissions they need, and then assign them to these profiles.

By default all internal users can read articles. However some licenses like the Knowledge Only User licenses, require the "AllowViewKnowledge" permission on the user's profile. To give a user the "AllowViewKnowledge" permission on their profile, activate the permission on a cloned profile and assign the cloned profile to the user.

 **Note:** To do more than read articles, agents need the Knowledge User license.

1. From Setup, enter *users* in the Quick Find box, then select **Users**.
2. Click **Edit** next to the user's name or click **New** to create a user.
3. If you are creating a user, complete all the required fields.
4. Select the **Knowledge User** checkbox.
5. Click **Save**.

See

User permissions control access to different tasks in Classic Knowledge. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you can create a permission set called "Article Manager" that includes the permissions to create, edit, publish, and assign articles.

Refer to this table for details on permissions associated with Classic Knowledge tasks. Refer to [Lightning Knowledge User Access](#) on page 587 on permissions associated with Lightning Knowledge.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)

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USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To create article types and article actions:

- Customize Application AND Manage Salesforce Knowledge

Salesforce Knowledge Task	User Permissions Needed
To manage article actions:	<p>“Manage Salesforce Knowledge”</p> <p>This permission is on by default in the System Administrator profile.</p>
To create articles from cases using the simple editor:	“Read” and “Create” on the article type
To create articles from cases using the standard editor:	<p>“Manage Articles” (This permission is on by default in the System Administrator profile.)</p> <p>AND</p> <p>“Read” and “Create” on the article type</p>
To search articles from cases and attach articles to cases:	“Read” on the article type
To create articles from answers:	“Read” and “Create” on the article type
To search for and read articles from the Article or Knowledge tab:	“Read” on the article type
To create or edit articles from the Article Management tab:	<p>“Manage Articles” (This permission is on by default in the System Administrator profile.)</p> <p>AND</p> <p>“Read”, “Create”, and “Edit” on the article type</p>
To edit draft articles from the Article Management tab:	<p>“Manage Articles” (This permission is on by default in the System Administrator profile.)</p> <p>AND</p> <p>“Read” and “Edit” on the article type</p>
To delete articles from the Article Management tab:	<p>“Manage Articles” (This permission is on by default in the System Administrator profile.)</p> <p>AND</p> <p>“Read”, “Edit”, and “Delete” on the article type</p> <p>AND</p> <p>A delete article action, set on the Article Actions Setup page.</p>
To publish articles from the Article Management tab:	<p>“Manage Articles” (This permission is on by default in the System Administrator profile.)</p> <p>AND</p> <p>“Read”, “Create”, “Edit”, and “Delete” on the article type</p> <p>AND</p> <p>A publish article action, set on Article Actions Setup page</p>

Salesforce Knowledge Task**User Permissions Needed**

To assign articles for the Article Management tab:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read” and “Edit” on the article type

To edit published or archived articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, and “Edit” on the article type

AND

A publish or archive article action, set on the [Article Actions Setup page](#)

To archive articles from the Article Management tab:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on the article type

AND

An archive article action, set on the [Article Actions Setup page](#)

To submit articles for translation:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, and “Edit” on the article type

AND

A translate article action, set on the [Article Actions Setup page](#)

To delete translated articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Edit”, and “Delete” on the article type

AND

A delete article action, set on the [Article Actions Setup page](#)

To publish translated articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on the article type

AND

A publish article action, set on the [Article Actions Setup page](#)

Salesforce Knowledge Task**User Permissions Needed**

To edit translated articles:

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, and “Edit” on the article type

AND

A translate article action, set on the [Article Actions Setup page](#)

To import articles:

“Manage Salesforce Knowledge” (This permission is on by default in the System Administrator profile.)

AND

“Manage Articles”

AND

“Manage Knowledge Article Import/Export”

AND

“Read”, “Create”, “Edit”, and “Delete” on the article type

To import and export translated articles:

“Manage Salesforce Knowledge” (This permission is on by default in the System Administrator profile.)

AND

“Manage Articles” (This permission is on by default in the System Administrator profile.)

AND

“Manage Knowledge Article Import/Export” (This permission is on by default in the System Administrator profile.)

AND

“Read”, “Create”, “Edit”, and “Delete” on the article type

To create data categories

“Manage Data Categories” permission. This permission is on by default in the System Administrator profile.

To enable agents to perform their specific tasks, create [public groups](#) for each role and assign only the necessary [article actions](#) to those groups.

 **Example:** Your Salesforce Knowledge agents are a mixture of different levels of job experience and expertise in the products and services your company offers. These examples outline four basic types of users and some of the permissions they need to perform their jobs.

Scott: The Reader

Scott Jackson is relatively new to the company, so he's a basic agent of the knowledge base. Currently, he has read-only access to articles, so he can search and view articles. Readers don't author or publish, so he won't belong to a public group or need to submit articles for approval. He needs the following permissions to perform his job.

Scott	Permission	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Search articles from and attach articles to cases	Manage Articles	✓			
Search for and read articles from the Articles tab		✓			

Amber: The Candidate

Amber Delaney is a candidate-level agent and can create and publish articles with statuses of either `Work in Progress` or `Not Validated`. If Amber works on an article with a different validation status, she must send it to a queue for approval before it's published.

Amber is part of the KCS Candidate public group and submits the articles she can't publish to the Publishing External queue. She needs the following permissions to perform her job duties.

Amber	Permission	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Search articles from and attach articles to cases		✓			
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	Manage Articles	✓	✓	✓	✓
Edit draft articles from the Article Management tab		✓	✓	✓	
Edit published or archived articles		✓	✓	✓	✓

Anne: The Contributor

As a contributor, Anne Murphy is a more advanced Knowledge user. She understands the standards for articles in the organization and can create articles and publish articles with `Validated Internal` status. She can also work on articles authored by other users if they have either `Work in Progress` or `Not Validated` statuses, and can change them to `Validated Internal`. Since she doesn't have permission to publish articles to an external audience, she must submit those customer-facing articles to the Publishing External queue.

 **Note:** Article approvers require the “Manage Articles” permission and at least the “Read” permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.

Anne is a member of the Contributor public group and she needs the following permissions to perform her job duties.

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create articles from cases using the simple editor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Create articles from cases using the standard editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Search articles from and attach articles to cases		<input checked="" type="checkbox"/>			
Create articles from answers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Search for and read articles from the Articles tab		<input checked="" type="checkbox"/>			
Create or edit article from the Article Management tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit draft articles from the Article Management tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Delete articles (version or entire) from Article Management tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assign articles from Article Management tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Edit published or archived articles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Archive articles from the Article Management tab	<input checked="" type="checkbox"/>				

Pat: The Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience. He is a member of the Publisher public group. Pat also belongs to the Publishing External queue. He needs the following permissions to perform his job duties.

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create articles from cases using the simple editor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Create articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Publish article from Article Management tab	✓	✓	✓	✓	✓
Assign articles from Article Management tab	✓	✓		✓	
Edit published or archived articles	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

How they all work together

Each user profile defines an agent's permission to perform different job duties and functions. To enable agents to perform these functions, you create [public groups](#) for each role and assign only the necessary [article actions](#) to that group. The criteria you create in the [approval process](#) defines which [validation status](#) can be automatically approved and published and which article must be approved and published by a domain expert.

For example, Anne, the Contributor, can create a `Validated External` article, but based on the article actions assigned to her public group, the approval process sends her article to Pat, the Publisher, to be published. Pat, as a Publisher, can publish his own articles without submitting them to a queue.

The following table lists the job functions that each role needs to perform on articles in the organization

Job Function	Reader	Candidate	Contributor	Publisher
Create and publish Work in Progress	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish Not Validated	No	Automatically approved and published	Automatically approved and published	Yes

Job Function	Reader	Candidate	Contributor	Publisher
Create and publish Validated Internal	No	Needs approval	Automatically approved and published	Yes
Create and publish Validated External	No	Needs approval	Needs approval	Yes
Update and publish Work in Progress	No	No	Automatically approved and published	Yes
Update and publish Not Validated	No	No	Automatically approved and published	Yes
Update and publish Validated Internal	No	No	Automatically approved and published	Yes
Update and publish Validated External	No	No	Needs approval	Yes

IN THIS SECTION:

[Create Public Groups for Knowledge](#)

Salesforce Knowledge uses public groups as a way to assign users to specific tasks related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

[Create Knowledge Actions](#)

Knowledge actions are templates that link a workflow action to an article type. When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want to have each FAQ published as a new version each time it completes the approval process, you can create a knowledge action that links the FAQ article type to the `Publish as New` action. Then, when you create an approval process for FAQs, select the new Knowledge Action.

[Assign Article Actions to Public Groups](#)

Article actions allow agents to participate in the article publishing process. By default, all article actions are assigned to users with the “Manage Articles” user permission. Agents can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding agents the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow agents to publish only those articles that have specific validation statuses. For example, many contributors can write many articles but you can create an approval process so no articles are published until they are reviewed and validated by a qualified author.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create Public Groups for Knowledge

Salesforce Knowledge uses public groups as a way to assign users to specific tasks related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

For example, when a member of the [Candidate](#) public group submits an article with the status `Work in Progress` for approval, it is automatically approved and published. If the same agent submits an article with `Validated Internal` status, it moves to the Publishing External queue to be reviewed before being published.

1. From Setup, enter *Public Groups* in the *Quick Find* box, then select **Public Groups**.
2. Click **New**, or click **Edit** next to the group you want to edit.
3. Enter the following information:

Field	Description
Label	The name used to refer to the group in any user interface pages.
Group Name (public groups only)	The unique name used by the API and managed packages.
Grant Access Using Hierarchies (public groups only)	<p>Select Grant Access Using Hierarchies to allow automatic access to records using your role hierarchies. When selected, any records shared with users in this group are also shared with users higher in the hierarchy.</p> <p>Deselect Grant Access Using Hierarchies if you're creating a public group with All Internal Users as members, which optimizes performance for sharing records with groups.</p> <p> Note: If Grant Access Using Hierarchies is deselected, users that are higher in the role hierarchy don't receive automatic access. However, some users—such as those with the "View All" and "Modify All" object permissions and the "View All Data" and "Modify All Data" system permissions—can still access records they don't own.</p>
Search	<p>From the <i>Search</i> drop-down list, select the type of member to add. If you don't see the member you want to add, enter keywords in the search box and click Find.</p> <p> Note: For account owners to see child records owned by high-volume portal users, they must be members of any portal share groups with access to the portal users' data.</p>

EDITIONS

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USER PERMISSIONS

To create or edit a public group:

- Manage Users

To create or edit another user's personal group:

- Manage Users

Selected Members

Select members from the Available Members box, and click **Add** to add them to the group.

Selected Delegated Groups

In this list, specify any delegated administration groups whose members can add or remove members from this public group. Select groups from the Available Delegated Groups box, and then click **Add**. This list appears only in public groups.

4. Click **Save.**

Note: When you edit groups, sharing rules are automatically reevaluated to add or remove access as needed. If these changes affect too many records at once, a message appears warning that the sharing rules aren't automatically reevaluated, and you must manually recalculate them.

Now [assign only the necessary actions](#) to your groups so the selected members can perform their tasks while keeping the integrity of your knowledge base.

SEE ALSO:

[Create Knowledge Actions](#)

[Assign Article Actions to Public Groups](#)

[Classic Knowledge User Access](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Create Knowledge Actions

Knowledge actions are templates that link a workflow action to an article type. When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want to have each FAQ published as a new version each time it completes the approval process, you can create a knowledge action that links the FAQ article type to the `Publish as New` action. Then, when you create an approval process for FAQs, select the new Knowledge Action.

 **Important:** When you create the approval process, make sure to change the final approval action to `Unlock the record for editing` to let users publish the article.

1. From Setup, enter `Knowledge Action` in the `Quick Find` box, then select **Knowledge Action**.
2. Click **New Knowledge Action**.
3. Select the article type for the action. The workflow rules and approval process that you associate with the action must belong to the same article type.
4. Enter a unique name for the knowledge action.
5. Select the type of action you want to apply to the article type. For example, `Publish as New` publishes the article as a new version.
6. Enter a description.
7. Click **Save**.
The Knowledge Action detail page appears showing you the rules and approval processes that use the knowledge action.
8. When you're ready to use the knowledge action in an approval or workflow process, click **Activate** on the Knowledge Action detail page.

SEE ALSO:

- [Assign Article Actions to Public Groups](#)
- [Create Public Groups for Knowledge](#)
- [Classic Knowledge User Access](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To enable Salesforce Knowledge Actions:

- [Customize Application](#)

Assign Article Actions to Public Groups

Article actions allow agents to participate in the article publishing process. By default, all article actions are assigned to users with the “Manage Articles” user permission. Agents can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding agents the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow agents to publish only those articles that have specific validation statuses. For example, many contributors can write many articles but you can create an approval process so no articles are published until they are reviewed and validated by a qualified author.

 **Note:** Although you can add any user to a public group, only agents with the “Manage Articles” user permission and the appropriate object permissions can perform article actions.

This table summarizes the article type permissions that are required for each article action.

Article Action	Create	Read	Edit	Delete
Publish Articles				
Archive Articles				
Delete Articles				
Edit Published and Archived Articles				
Submit Articles for Translation				
Publish Translation				
Edit Translation				

1. From Setup, enter *Knowledge Article Actions* in the Quick Find box, then select **Knowledge Article Actions**.
2. Click **Edit**.
3. For the action you want to assign, select the appropriate radio button and choose a public group.
If you don't modify an article action, all agents with the “Manage Articles” permission can perform that action.
4. Click **OK** and then click **Save**.

 **Note:** Article action assignments are ignored when updating an article through SOQL.

SEE ALSO:

- [Create Public Groups for Knowledge](#)
- [Create Knowledge Actions](#)
- [Classic Knowledge User Access](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

USER PERMISSIONS

To create public groups and assign them to article actions:

- **Customize Application**
AND
Manage Users
AND
Manage Salesforce Knowledge

Define Validation Status Picklist Values

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

 **Note:** In Salesforce Classic, validation status picklist values aren't retained when you export articles for translation. Articles with picklist values can be imported, however, and their values are retained as long as the values exist in your organization.

1. From Salesforce Classic Setup, enter `Validation Statuses` in the `Quick Find` box, then select **Validation Statuses**.
2. On the picklist edit page, click **New** to add new values to the validation status field. You can also edit, delete, reorder, and replace picklist values.
When you replace a picklist value, the system replaces it in all versions of the article, including any archived versions.
3. Add one or more picklist values (one per line) in the text area.
4. To set the value as the default for the picklist, be sure to select the `Default` checkbox.
5. Click **Save**.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To create or change validation status picklist values:

- `Customize Application`

Workflow and Approvals for Articles

Ensuring that the content in your articles is accurate and helpful is foundational to getting accurate information to those who need it most. Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you additional control over the content and publication of your articles.

Creating workflow rules and approval processes lets your organization automate many of the tasks involved with managing its knowledge base. When implementing Salesforce Knowledge, you can create workflow rules and approval processes for some or all the article types used by your organization.

Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article owner when a new article is created from a case. Tasks are not supported by article type workflow.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

 **Note:** Tasks aren't available for article type workflow rules. For more information about creating workflow rules, see [Set the Criteria for Your Workflow Rule](#). For more information about creating an approval process, see [Create an Approval Process with the Standard Wizard](#).

1. From Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Select the article type from the **Select object** drop-down list.
4. Click **Next**.
5. Enter a rule name. Optionally, enter a description for the rule.
6. Select the evaluation criteria and choose how criteria are met.
7. Enter criteria for the rule.
8. Click **Save & Next**.
9. Click **Add Workflow Action**, select the type of action for the rule, and enter the information required by the action.
10. Click **Save**.
11. Optionally, add a time-dependent workflow action by clicking **Add Time Trigger**. Provide time trigger information and then click **Save**.
12. Click **Done**.
13. From Setup, enter *Approval Processes* in the **Quick Find** box, then select **Approval Processes**.
14. Choose the Approval Process Wizard.

Two wizards are available to help you through the approval setup process. Choose the one that better meets your requirements. See [Choose the Right Wizard to Create an Approval Process](#).
15. Provide a name, unique name, and description for the process.
16. Specify criteria for entering the process.

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USER PERMISSIONS

To view workflow rules and approval processes:

- View Setup and Configuration

To create or change workflow rules and approval processes:

- Customize Application

For example, you could specify that if the article is published on a public site it requires approval: *Visible on public site equals True*.

17. Specify approvers for the process.

Let the submitter choose the approver manually. (default)

Prompts the user to select the next approver.

Automatically assign an approver using a standard or custom hierarchy field.

Assigns the approval request to the user in the field displayed next to this option. You select this field when you configure the approval process.

Automatically assign to a queue.

Available only for objects that support queues. Assigns approval requests to a queue.

Automatically assign to approver(s).

Assigns the approval request to one or more specific users, specific queues, or users related to the submitted record. You can add up to 25 per step.

18. Select the email template that the process uses to notify approvers.

When an approval process assigns an approval request to a user, Salesforce automatically sends the user an approval request email. The email contains a link to the approval page in Salesforce, where the agent can approve or reject the request and add comments.

19. Configure the approval request page layout.

The approver approves or rejects the article from this page. You can add as many fields to this page as you think your agents need to reasonably assess an article's content. For example, you might choose to include information such as a summary of the article's content, the product discussed, and the author's name.

20. Specify which users are allowed to submit articles for approval.

For example, for articles that require editing before approval, you could create a public group containing editors, and then specify that only members of that group can submit articles for approval.

21. Activate the approval process.

 **Example:** When an approval process is associated with an article type, agents with the “Manage Articles” permission might see both the **Publish...** and **Submit for Approval** buttons from an article's detail page. Which buttons they see is determined by both permissions and article actions. These agents can publish an article without submitting it for approval. To limit this ability to certain users, assign the “Publish Articles” article action to a select group of users instead of giving it to all users with the “Manage Articles” permission. The ability to publish articles without prior approval is governed by an approval process that is specific to each user's public group.

Keep the following in mind when creating approval processes for article types.

- Adding an approval process to an article type lets your organization ensure that the required reviewers approve the article before it's published. When an approval process is enabled for an article's article type, the Approval History related list displays on the article details page.
- When creating an approval process, change the final approval action to “Unlock the record for editing” to allow agents to publish the article.
- Articles aren't published automatically at the end of an approval process. Agents must click **Publish...** to make the article available in the publishing channels.
- When an approval process is associated with an article type, agents with the “Manage Articles” permission might see both the **Publish...** and the **Submit for Approval** buttons on an article's detail page. (Which buttons they see is determined by both permissions and article actions). These agents can publish an article without submitting it for approval. To prevent this from affecting many users, assign the “Publish Articles” article action to a limited group of users instead of giving it to all users with the “Manage

Articles” permission. For more information, see [Assign Article Actions to Public Groups](#) on page 654. You still need to make sure that the users with direct publishing capability know which articles need approval before publication.

- Article approvers require the “Manage Articles” permission and at least the “Read” permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.
 - Workflow rules and approval processes apply to the “Draft to Publication” portion of the article publishing cycle. Workflow rules aren’t available for archiving. Approval processes aren’t available for translation or archiving.
-  **Note:** When an article is published from the edit page, the article is first saved and then published. Workflow rules apply to the saved draft article but not the published article.
- A user who only has read access to an article type can publish a draft article of that type if there is an approval process associated to the article type and the approval process is complete (all the approvers have approved) but the article has not been published.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

Modify Default Category Group Assignments for Articles

Salesforce Knowledge uses data categories to classify articles. Data categories are organized in category group. After creating category groups, admins decide which groups to use for Salesforce Knowledge articles. For example, if your org uses both the Answers and Salesforce Knowledge, you might want one category group to be used by the answers community and two other category groups for articles. Answers and articles can use the same category group. Authors can assign up to eight data categories from one category group to an article so that users searching for articles can find and filter by category. By default, all the category groups you create are assigned to Salesforce Knowledge

1. From Setup, enter *Data Category Assignments* in the Quick Find box, then select **Data Category Assignments** under Knowledge.
A list of all category groups appears.
2. Click **Edit** and move any category groups that you don't want available for articles from the Selected Category Groups list to the Available Category Groups list.
Later, you can choose to make a hidden category group visible.

 **Note:** The order of category groups is not preserved from the edit page to the data category assignment page.

3. Click **Save**.
You receive an email after the save process completes. Authors can now assign categories in the selected groups to articles on the Article Management tab. Authors can only access categories if the category group is active and the author's [data category visibility settings](#) provide access to the category.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)
[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To modify category groups assignments in Salesforce Knowledge:

- Customize Application AND Manage Salesforce Knowledge

Filter Articles with Data Category Mapping

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

Important:

- Filtering articles based on case information is only supported in text and picklist fields.
- Filters are applied to Knowledge results after the case has been saved.
- Filters are applied after a Knowledge search and only to the articles returned in the search.
- Using Filters does not return a list of all articles that match the filter criteria. Instead, the filters are applied to the initial pool of article results returned.
- Results may be filtered after a search.
- A category group can only be used once in a data category mapping.
- Suggested articles are returned if `Suggest articles for cases considering case content` is enabled. When suggested articles is disabled, search uses data category mappings. Case subject fields are used when there are no data category mappings.

To implement data category mapping, select which case fields map to which data categories and set a default data category for cases that have no value for the mapped fields.

For information on data categories, see [Data Categories in Salesforce.com](#) on page 677.

1. From Setup, enter *Data Category Mappings* in the `Quick Find` box, then select **Data Category Mappings**.
2. In the `Case Field` column, use the drop-down list to add a field.
3. In the `Data Category Group` column, use the drop-down list to map the information from the lookup field to a data category.
4. In the `Default Data Category` column, use the drop-down list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

SEE ALSO:

- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To map data category groups

- Customize Application AND Manage Salesforce Knowledge

Support Articles in Multiple Languages

With multiple languages for Salesforce Knowledge, you can lower support costs by translating articles into the languages your audience prefers. After selecting your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

- Before you add languages to your knowledge base, decide for each language whether you want to translate articles directly in Salesforce or export articles to a translation vendor. Communicate your decision to the people involved in the translation process (authors, reviewers, translation managers, publishers).
- When adding a language to your knowledge base, keep in mind that it can't be deleted; however, you can hide a language by making it inactive. Deactivating a language means it no longer appears as a choice in the New Article dialog or the Submit for Translation dialog. Also, if articles are already published in the language, those articles are no longer visible to readers when the language is deactivated.
- You can only add languages supported by Salesforce to your knowledge base.
- To hide translated articles for a specific language, deactivate the language by unchecking `Active` on the Settings page.

IN THIS SECTION:

[Support a Multilingual Knowledge Base](#)

Reach a global audience by offering your knowledge base in multiple languages.

[Export Articles for Translation](#)

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Export Articles for Translation feature in Setup.

[Import Translated Articles](#)

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Import Article Translations feature in Setup. You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Support a Multilingual Knowledge Base

Reach a global audience by offering your knowledge base in multiple languages.

1. In Setup, enter *Knowledge Settings* in the *Quick Find* box, then select **Knowledge Settings**.
2. Click **Edit**.
3. Select *Multiple Languages* and add the languages you want to include in your knowledge base.

 **Important:** You can add the languages that your instance of Salesforce supports. But you can't remove any languages that have been added to your knowledge base.

4. Choose which settings you want to apply to language.

Setting	Description
Active	Active languages appear in the New Article and Submit for Translation dialog boxes. The active/inactive status determines whether a published article is visible. For example, if Spanish articles are published to your partner portal and then you make Spanish an inactive language, the articles no longer appear.
Default Assignee	The default assignee is automatically assigned articles submitted for translation. The default assignee can be either an individual person or a queue.
Default Reviewer	The default reviewer is automatically assigned finished translations that are ready to be reviewed or published. The default reviewer can be either an individual person or a queue.

5. Save your changes.
6. If you want, create queues to distribute and assign articles to groups of people who can either translate them or review the finished translations. When setting up queues, use the Knowledge Article Version object.

SEE ALSO:

- [Create Queues](#)
- [Export Articles for Translation](#)
- [Import Translated Articles](#)
- [Support Articles in Multiple Languages](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To set up multiple languages for Salesforce Knowledge:

- [Customize Application AND Manage Salesforce Knowledge](#)

Export Articles for Translation

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Export Articles for Translation feature in Setup.

Place the articles to be translated in a translation queue. To enable the article export feature, create one or more queues; authors and reviewers select the queue when they submit an article for translation. Make sure that they know which queue to choose for which language.

 **Note:** You can have up to 50 exports in 24 hours and a maximum of 15 pending exports (exports that have not entered a final state such as Completed, Failed, or Canceled).

1. Create a [translation queue](#) with articles for translation.
2. On the Article Management tab, select the articles you want to translate, and click **Submit for Translation**.
3. In the dialog box, indicate which languages to translate the articles into and assign the translations to their corresponding language translation queue.
4. From Setup, enter *Export Articles for Translation* in the Quick Find box, then select **Export Articles for Translation**.
5. Select the queue that contains the articles you're exporting.
6. Select either:
 - **All articles** to export every article in the queue.
 - **Updated articles** to only export articles that have been modified or added.
7. Click **Continue**.
8. Select the source and target language pairs you want to export.

 **Important:** Salesforce creates a separate .zip file for every article type in each language pair. You must retain the .zip file structure for a successful import. For more information, see [Import Translated Articles](#) on page 664.

9. To have the files reviewed or published after being translated, select a user or a queue.
10. Select the file character encoding.
 - ISO-8859-1 (General US & Western European, ISO-LATIN-1)
 - Unicode
 - Unicode (UTF-8) *default*
 - Japanese (Windows)
 - Japanese (Shift_JIS)
 - Chinese National Standard (GB18030)
 - Chinese Simplified (GB2312)
 - Chinese Traditional (Big5)
 - Korean
 - Unicode (UTF-16, Big Endian)
11. Select the delimiter for the .csv files.

The delimiter is the separator for columns when the file is converted to table form. Your options are tab (default) or comma.

12. Click **Export Now**.

EDITIONS

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USER PERMISSIONS

To export articles:

- Manage Salesforce Knowledge

AND

Manage Articles

AND

Manage Knowledge Article Import/Export

To view articles:

- Read on the article type

To create articles:

- Read and Create on the article type

You're notified by email when your export is complete. You can also check the status of your export by viewing the Article Import and Export Queue. From Setup, enter *Article Imports and Exports* in the **Quick Find** box, then select **Article Imports and Exports**.

Unzip the exported files, but retain the file structure for a successful import.

SEE ALSO:

[Import Translated Articles](#)

[Support a Multilingual Knowledge Base](#)

[Support Articles in Multiple Languages](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Import Translated Articles

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Import Article Translations feature in Setup. You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.

1. From Setup, enter *Import Article Translations* in the Quick Find box, then select **Import Article Translations**.
2. Choose how Salesforce handles translations after they're imported.

Option	Description
Review imported translations on the Article Management tab before publishing	Add imported translations to a queue from which agents can review them.
Publish translations immediately on import	Publish imported translations without reviews.

3. Select the language of the articles you're importing.
4. If you chose to have articles reviewed before publishing, select to send the files to a user or a queue.
5. Click **Browse**, choose the translation .zip file to upload, and click **Open**.
You must place all the translation files (meaning, those exported from Salesforce and translated by your vendor) in a folder whose name is the same as the language code. For example, put French articles in an *fr* folder. Zip up this folder to create your import file.

Important: To import translated articles successfully, verify that the file structure and their extensions match the file structure and extensions of files exported from Salesforce Knowledge for translation. For example, if the target language is French, the file structure begins as follows:

```
import.properties
-fr
--articletypearticlename_kv
---articlename.csv
---[Article collateral, html, images, etc.]
```

6. Click **Import Now**.
If you have more translated articles to upload, repeat steps four through six.
7. Click **Finish**.

EDITIONS

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USER PERMISSIONS

To export articles:

- Manage Salesforce Knowledge
- AND
- Manage Articles
- AND
- Manage Knowledge Article Import/Export

To view articles:

- Read on the article type

To create articles:

- Read and Create on the article type

An email notification is sent to you when your import finishes. You can view the status of your import from Setup by entering *Article Imports and Exports* in the Quick Find box, then selecting **Article Imports and Exports**.

SEE ALSO:

[Article and Translation Import and Export Status](#)

[Export Articles for Translation](#)

[Support a Multilingual Knowledge Base](#)

[Support Articles in Multiple Languages](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Improve the Article Search Experience

Enable search highlights and snippets, synonyms, promoted terms, topics, and keywords from cases to improve your article search.

IN THIS SECTION:

[Search Highlights and Snippets](#)

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

[Synonym Groups for Article Searches](#)

Create synonym groups so words or phrases are treated equally in searches. When users search Salesforce Knowledge articles, they find matches for all terms in a synonym group.

[Manage Promoted Search Terms](#)

From a single page, view, edit, and delete all the promoted search terms that are associated with Salesforce Knowledge articles.

[Enable Topics for Articles](#)

With topics on articles, you can classify and search articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

[Use More Case Keywords to Find Articles](#)

When searching articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Search Highlights and Snippets

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

Search highlights and snippets give your agents and users context as to why the particular result matched their search query. The relevant text appears below the title with the search terms in bold. You can enable search highlights and snippets on the [Salesforce Knowledge Settings page](#) on page 604.

 **Note:** Search highlights and snippets are not generated for searches with wildcards.

Search highlights and snippets are generated from the following fields:

- Email
- Long text area
- Rich text area
- Text area

Search highlights and snippets aren't generated from the following fields:

- Checkbox
- Currency
- Date
- Date Time
- File
- Formula
- Lookup
- Multi-picklist
- Number
- Percent
- Phone
- Picklist
- URL

 **Note:** If a snippet is not generated, the article's summary field is shown instead.

SEE ALSO:

- [Improve the Article Search Experience](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Synonym Groups for Article Searches

Create synonym groups so words or phrases are treated equally in searches. When users search Salesforce Knowledge articles, they find matches for all terms in a synonym group.

A search for one term in a synonym group returns results for all terms in the group. For example, if you define a synonym group with these synonyms:

CRM, customer relationship management, Salesforce

then a search for *customer relationship management* matches articles that contain *customer relationship management* and articles that contain *CRM* or *Salesforce*.

To create a custom synonym group, from Setup, enter *Synonyms* in the Quick Find box, then select **Synonyms**. An org can create up to 10,000 synonym groups with up to six terms in each group.

Synonyms affect search behavior in the following ways:

Priority

If a search term is part of a synonym group, the search results list items that contain the search term, followed by items that contain other terms in the synonym group.

For example, if this synonym group is defined:

fruit, oranges

Then a search for *oranges* matches a list of items containing *oranges*, followed by items containing *fruit*.

 **Note:** In the Article Management tab, if you sort the list by clicking a column header, the sort order, not priority, persists in the current and additional searches.

Wildcards

If a wildcard is used in a search, the wildcard expands the search term, but the search doesn't match any synonyms, even if the search phrase contains a defined synonym.

For example, if these synonym groups are defined:

fruit, oranges, apples

cabbage, lettuce

Then a search for *orang* lettuce* matches items that contain *orange* and *oranges*, but doesn't match items that contain *fruit*, *apples*, and *cabbage*.

Operators

If a search phrase contains an operator (AND/OR/AND NOT), synonym matches are returned only if the entire search phrase is a defined synonym.

For example, if these synonym groups are defined:

fruit, oranges and apples

vegetables, carrots

Then a search for *oranges and apples* returns matches for all items that contain the literal string *oranges and apples* and items that contain the term *fruit*.

However, if the search phrase is *fruit and vegetables*, which is not a defined synonym, the search matches only those items that contain both the terms, *fruit* and *vegetables*.

EDITIONS

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In this case, AND functions as an operator and synonym matches are not returned in the search results. In terms of this example, items that contain a synonym of either *fruit* or *vegetables* (items that contain the term *carrots* or the phrase *oranges and apples*) are not returned.

Exact phrase matches

If a defined synonym is within an exact phrase search, using quotation marks, the search doesn't treat it as a synonym.

Lemmatization

Synonyms aren't lemmatized in search results; instead, they are matched as an exact phrase. However, the search term is lemmatized.

For example, if this synonym group is defined:

quench, drink orange juice

Then a search for *quench* matches items that contain *quench*, *quenched*, *quenching*, and *drink orange juice*, but doesn't match items that contain *drinking orange juice*.

Ignored words

Words that are normally ignored in searches, such as *the*, *to*, and *for*, are matched if the word is part of a defined synonym.

For example, if this synonym group is defined:

peel the orange, cut the apple

Then a search for *peel the orange* matches items that contain the exact string *peel the orange*.

Overlapping synonyms

If a search term consists of overlapping synonyms from different groups, the search matches synonyms in all the overlapping synonym groups.

For example, if these synonym groups are defined:

- *orange marmalade, citrus*
- *marmalade recipe, sugar*

Then a search for *orange marmalade recipe* matches items that contain *orange marmalade*, *citrus*, *marmalade recipe*, and *sugar*.

Subsets

If one synonym group includes a synonym that is a subset of a synonym in another group, a search for the subset term doesn't match items that contain synonyms from the subset synonym group.

For example, if these synonym groups are defined:

- *orange, apple*
- *orange marmalade, citrus*
- *marmalade, jam*

Then a search for *orange marmalade* matches items that contain *orange marmalade* and *citrus*, but doesn't match items that contain *apple* or *jam*.

SEE ALSO:

[Improve the Article Search Experience](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Manage Promoted Search Terms

From a single page, view, edit, and delete all the promoted search terms that are associated with Salesforce Knowledge articles.

In Salesforce Classic, you can [add promoted search terms to articles](#) on the article's detail page in the Promoted Search Terms related list.

1. From Setup, enter *Promoted Search Terms* in the QuickFind box, then select **Promoted Search Terms**.
2. To view which terms are assigned to an article, sort by the Article column.
3. To edit a term, click **Edit** in its row.
You can change the term only from this page, not the article it is assigned to.
4. To delete a term, click **Delete** in its row.
The term is deleted only from the article associated with this row, not from other articles.
5. Remember to save your changes.

SEE ALSO:

- [Improve the Article Search Experience](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create, edit, and delete promoted search terms:

- Manage Promoted Search Terms

Enable Topics for Articles

With topics on articles, you can classify and search articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

 **Note:** Contrary to data categories, topics added to an article are not transferred to the same article in another language.

Topics for articles are enabled for each article type.

1. From Setup, enter *Topics for Objects* in the **Quick Find** box, then select **Topics for Objects**.
2. Click the article type name where you want to enable topics.
3. Check **Enable topics**.
4. Select which fields you want to use for suggestions.
5. Click **Save**.
6. Via profile or permission set, under System Permissions, define which agents can assign, create, delete, and edit topics.

SEE ALSO:

- [Improve the Article Search Experience](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

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USER PERMISSIONS

To enable topics:

- [Customize Application](#)

Use More Case Keywords to Find Articles

When searching articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

Luckily, Salesforce Knowledge search pages accept other parameters:

- **id=<case id>**: The ID of the current case.
- **search=<keywords>**: The keywords to be searched.
- **articleType_<article type dev name>=on**: multiple parameters possible, article types to select (if no article type is selected, then all article types are selected)
- **ct_<data category group internal name>=<data category internal name>**: multiple parameters possible, filter pre-selection

To take advantage of those parameters, add a custom button to the case detail page containing a few lines of javascript that extract keywords from the case and hide the default article search button.

 **Note:** You can also create a custom article widget with `support:caseArticle`.

1. From the object management settings for cases, go to Buttons, Links, and Actions.
2. Click **New Button or Link**.
3. Enter a unique Label, Name, and Description.
4. Select **Detail Page Button** for Display Type.
5. Select **Execute JavaScript** in the Behavior drop-down.
6. Select **OnClick JavaScript** in the Content Source drop-down.
7. Enter code for extracting case data and setting up parameters for the article search page.

For example:

```
// article search page URL
var url = '/knowledge/knowledgeHome.apexp';

// ID of the current case
url += '?id={!Case.Id}';

// use the case subject as the search keywords
url += '&search={!Case.Subject}';

// read case attributes
var caseType = '{!Case.Type}';
var caseProduct = '{!Case.Product__c}';

// if the case is of a certain type, select only 2 of the article types available
// in other cases, we keep the default behavior (all article types selected)

if (caseType=='Problem' || caseType=='Question') {
  url += '&articleType_FAQ_kav=on';
  url += '&articleType_How_To_kav=on';
}

// preselect a data category for search results based on the category
```

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USER PERMISSIONS

To create or change custom buttons or links and create a Visualforce page:

- Customize Application

```
var product = '';
if (caseProduct=='Home')
    product = 'Home';
if (caseProduct=='SMB')
    product = 'Small_and_Medium_Business';
if (caseProduct=='Large enterprise')
    product = 'Large_Enterprise';

if (product.length>0)
    url += '&ct_Products2=' + product;

// once the logic is executed, we go to the article search page
window.location = url;
```

8. Click **Save**.
9. From the object management settings for cases, go to Page Layouts.
10. Click **Edit** next to Case Layout.
11. Drag your custom button for article search into the case layout.
12. Click **Save**.
13. Create a Visualforce page named *CaseDetailsWithoutStandardKBSearchButton* with the following code:

```
<apex:page standardController="Case">
  <style type="text/css">
    div.knowledgeBlock input {display: none}
  </style>
  <apex:detail/>
</apex:page>
```

14. Back in the Buttons, Links, and Actions area for cases, click **Edit** next to View.
15. Select **Visualforce Page** in Override with.
16. Select **CaseDetailsWithoutStandardKBSearchButton** from the drop-down.
17. Click **Save**.

SEE ALSO:

- [Improve the Article Search Experience](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Set Up the Knowledge One Widget

Knowledge One is available as a widget that you can plug in to the Salesforce Console for Service or Salesforce Console for Sales. If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search, send, and create articles, all without leaving the case.

Of [all the Salesforce Knowledge article widgets](#), the Knowledge One widget lets you:

- Attach a published Salesforce Knowledge article to the case in 1 click. In Salesforce Classic, you can attach a document from an external data source to a case if Chatter is enabled.
- Share an article as a URL, if it is shared on a public channel.
- Email an article as a PDF, if it is shared on a public channel.
- Create and manage articles.
- Make adjustments based on your window width. In the console, in windows smaller than 600 pixels, the searchable objects are displayed in a drop-down menu.

 **Note:** The article widget in a case feed search doesn't necessarily use the agent's language. If the agent's language isn't a Salesforce Knowledge supported language but their locale language is, the locale language is the search language. If neither the agent's language nor local language are supported, the search language is the default Salesforce Knowledge language, which you can find and set on the Knowledge Settings page.

1. From the object management settings for cases, go to Page Layouts and open your case page layout for edit.
2. Ensure the Email quick action is in the case page layout.
Without the Email quick action, you can't send articles via email.
 - a. Select **Quick Actions** in the left-hand menu.
 - b. Drag **Email** to the **Quick Actions in the Salesforce Classic Publisher** line.
3. Disable previous article sidebar components.
 - To disable the Knowledge sidebar, click **Layout Properties** and ensure **Knowledge Sidebar** is unchecked.
 - To disable the case feed article tool, click **Feed View** and ensure **Use Case Feed Article Tool in the Console** is unchecked.
4. In the page layout editor, click **Custom Console Components**.
5. In the sidebar where you want the Knowledge One widget, select **Knowledge One** in the Type drop down and set the sidebar parameters.

Email quick action to be added to the Case page layout in order to show up

 **Tip:** If you can't see the Knowledge One sidebar, increase its width to 250 (height to 150) in the page layout. These are the minimum measurements for the Knowledge One sidebar to display properly.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To administer Salesforce Knowledge and Salesforce Console for Service:

- **Customize Application**
AND
Manage Salesforce Knowledge

IN THIS SECTION:

[Compare Article Widgets for Cases at a Glance](#)

Decide which Salesforce Knowledge article widget is best for your organization.

SEE ALSO:

[Compare Article Widgets for Cases at a Glance](#)

Compare Article Widgets for Cases at a Glance

Decide which Salesforce Knowledge article widget is best for your organization.

Does the widget...	Article Widget	Article Case Feed Widget	Knowledge One Widget
Filter on data category	Yes	No	Yes
Create an article	No	No	Yes
Search an external object	No	No	Yes
Access your draft articles	No	No	Yes
Attach an article to a case	Yes	Yes	Yes
Send an article as a PDF	No	Yes	Yes
Share an article's public URL	No	Yes	Yes
Adjust with the window size	No	No	Yes
Have more than one way to suggest articles	No	No	Yes

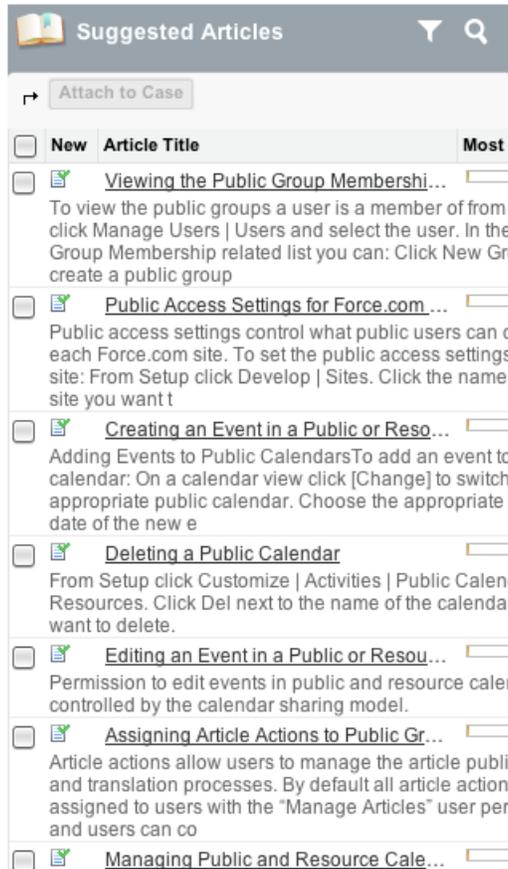
EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

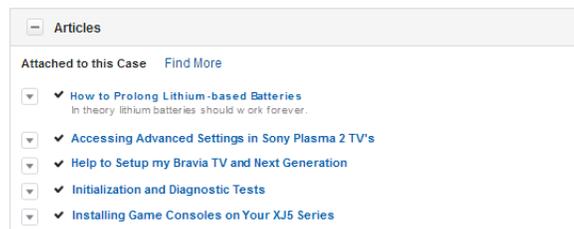
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Article Widget



Article Case Feed Widget



Knowledge One Widget

≡ Knowledge
✎

[< Back to Suggestions](#)
Filters ▾

Articles

How to Prolong Lithium-based Batteries

In theory lithium batteries should work forever, but cycling, elevated temperature and aging decrease the performance o..

How To • Validated External • Last Published 12/19/2...

Accessing Advanced Settings in Sony Plasma 2 TV's

Instructions on how to access the advanced settings on all Sony Plasma TV's.

FAQ • Not Validated • Last Published 12/19/2...

Help to setup my Bravia TV and next generation

Troubleshooting • Not Validated

Initialization Diagnostic Test

3T Philips Achieva MRI

Troubleshooting • Not Validated

Installing game consoles on your XJ5 Series

A guide to installing a gaming console on your XJ5 Series TV.

Troubleshooting • Not Validated

20V Max Lithium String Trimmer LST220

You already know the score: Gas lawn and garden equipment is a pain. Between clean up, pull cords, storage and mak..

Video • Validated External • Last Published 11/8/2013

[Show more Articles](#)

SharePoint

[How To Use This Library.aspx](#)

[Branding Guidelines.pptx](#)

Comment : **Brand Guidelines November, 2013**

SEE ALSO:

[Set Up the Knowledge One Widget](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Set Up Categories for Articles, Answers, and Ideas

Data categories are used in Salesforce to organize and control access to groups of information. Data categories are used in Salesforce Knowledge, Ideas, Answers, and Chatter Answers.

IN THIS SECTION:

[Data Categories in Salesforce.com](#)

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

[Data Category Visibility](#)

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see.

Data Categories in Salesforce.com

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

Salesforce Knowledge uses data categories to classify articles and make them easier to find. For example, to classify articles by sales regions and products, create two category groups: Sales Regions and Products. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level and North America, Europe, and Asia at the second level. The Products group could have All Products as the top level and Phones, Computers, and Printers at the second.

Data Category Limits	Details	
Maximum number of data category groups and active data category groups	5 category groups, with 3 groups active at a time	5 category groups, with 3 groups active at a time
Maximum number of categories per data category group	100 categories in a data category group	100 categories in a data category group
Maximum number of levels in data category group hierarchy	5 levels in a data category group hierarchy	5 levels in a data category group hierarchy
Maximum number of data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article

In an answers zone, data categories help organize questions for easy browsing. Each answers zone supports one category group. For example, if you're a computer manufacturer you might create a Products category group that has four sibling categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. On the Answers tab, zone members can assign one of the four categories to each question and then browse these categories for answers to specific questions.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Data categories and answers are available in **Enterprise, Performance, Unlimited, and Developer** Editions.

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

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

Example:

Logical Classification of Articles

As a knowledge base administrator, you can organize your knowledge base articles into a logical hierarchy and tag articles with the attributes that are significant to your business.

Easy Access to Questions

As an answers administrator, you can choose which data categories are visible on the Answers tab. Zone members can tag a question with a category, which makes finding questions and answers easier for other members.

Control of Article and Question Visibility

As a knowledge base or answers community administrator, you can centrally control the visibility articles or questions by mapping roles, permission sets, or profiles to categories in the category groups. When an article or question is categorized, users with visibility can automatically see it.

Article Filtering

As a support agent, when articles are classified into logical categories, you can quickly and easily locate the article you need by filtering your organization's knowledge base. To ensure you see all relevant articles, filtering by category has expansive results that include a category's upward and downward relatives in the category hierarchy. For example, if your category hierarchy for products has the levels All Products > Computers > Laptops > Gaming Laptops and you are helping a customer with a laptop problem, filtering by Laptops returns articles classified with Laptops as well as articles classified with Computers, All Products, or Gaming Laptops. Effectively, you are made aware of useful related articles like a free shipping offer for all products or an upgrade offer for gaming laptops. (To prevent irrelevant results, category filtering doesn't return nonlinear relatives like siblings and cousins. Articles about Desktops, a sibling of Laptops, would not display.)

Article and Question Navigation

As an end user, you can navigate the categories on the Articles tab or Answers tab to find the information you need to solve your problem.

Managing Category Groups for Articles and Questions

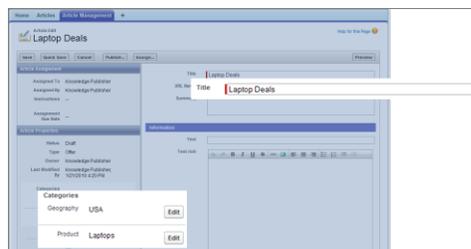
If your organization has Salesforce Knowledge and an answers community, you can create separate category groups or use the same category group for articles and questions.

Data Categories in Articles

A category group is the container for a set of categories. In Salesforce Knowledge it corresponds to the name of the category drop-down menus. For example, if you use the Data Categories page in Setup, (enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**) to create and activate a category group called Products, a Products menu displays on the Article Management tab, the article edit page, the Articles tab in all channels, and the public knowledge base.

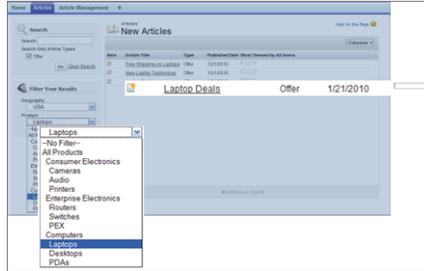
As an illustration, the figure below shows a knowledge base administrator's view of an article about laptop deals; using the article edit page, the administrator has classified the article with Laptops in the Products category group, and USA in the Geography category group.

An Article About Laptop Deals on the Article Management Tab



The next figure now illustrates an agent finding that same article published on the Articles tab; the agent has selected Laptops and USA respectively in the Products and Geography drop-down menus to retrieve an article that is classified with both Laptops and USA.

An Article About Laptop Deals on the Articles Tab



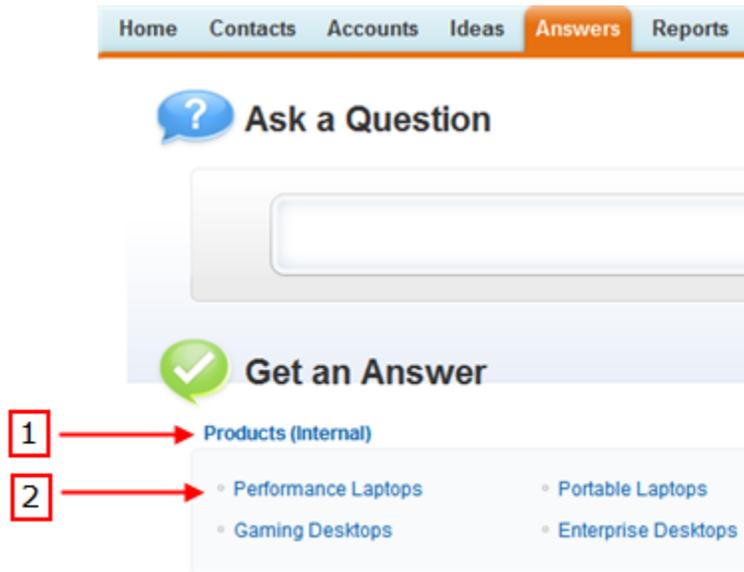
When you add categories to a category group, you build a hierarchy that can contain up to five levels of depth and up to 100 categories total. Each category can have one parent, many siblings, and many children. A robust and well-organized category hierarchy helps users find the articles that are relevant to them quickly and easily.

By default, all Salesforce Knowledge users have access to all categories; however, you can [restrict category visibility by role, permission set, or profile](#).

Data Categories in Answers Zones

An answers zone supports one category group, and members can assign one category to each question. Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. The categories within the group display on the Answers tab below the zone name.

Answers tab displaying categories



By default, all zone members have access to all categories; however, you can [specify category visibility](#).

Data Category Implementation Tips

Consider the following information when planning and implementing data categories for your organization:

- You can create up to three category groups with a maximum of five hierarchy levels in each group. Each category group can contain a total of 100 categories.
- If you want to use data categories with Answers, after creating your category group you must assign it from Setup by entering *Data Category Assignments* in the **Quick Find** box, then selecting **Data Category Assignments** under Answers. You can only assign one category group to an answers community. Salesforce Knowledge supports multiple category groups.
- Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. Salesforce Knowledge supports a hierarchy of data categories.
- Category groups are hidden from users until they are activated. Do not activate a category group until you have finished defining its categories and their access settings, including their visibility.
- When assigning categories to articles, you can choose up to eight categories in a category group.
- If an article has no categories, it displays only when you choose the **No Filter** option in the category drop-down menu.
- When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example, if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting "Optical Networks" from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting "Optical Networks" does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.
- Once [visibility settings](#) have been chosen for the categories:
 - Users who are not assigned visibility can only see uncategorized articles and questions unless [default category visibility](#) has been set up.
 - For role-based visibility, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers by default. You can [change the category group visibility settings](#) for each portal role.
 - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- Deleting a category:
 - Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
 - Permanently deletes its child categories.
 - As applicable, removes the category and its children from the Answers, Article Management, and Knowledge tabs in all channels, and your company's public knowledge base.
 - Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
 - Removes its mapping to visibility. Readers lose their visibility to articles and answers associated with the deleted category.
- Deleting a category group:

- Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15-day holding period, you can either restore a category group, or permanently erase it immediately.
 - Deletes all categories within that group.
 - Removes all associations between the group's categories and articles or questions.
 - Removes all associations between the group's categories and visibility.
 - As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.
- You can translate the labels of categories and category groups using the Translation Workbench.

Best Practices for Data Categories

Consider the following tips when using data categories:

- To quickly manage data categories, use [keyboard shortcuts](#).
- After creating or updating categories, set up [category group visibility rules](#).
- Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

IN THIS SECTION:

[Keyboard Shortcuts for Data Categories](#)

Use keyboard shortcuts to work quickly with data categories.

[Create and Modify Category Groups](#)

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

[Delete and Undelete Category Groups](#)

Deleting a category group deletes all of its categories and removes all associations between the categories and articles or questions. Read this entire topic carefully to understand the consequences of deleting category groups.

[Add Data Categories to Category Groups](#)

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

[Modify and Arrange Data Categories](#)

Modifying and arranging categories can result in long processing times, changes to the visibility and categorization of articles, and other significant consequences. Read this entire topic carefully before modifying categories.

[Delete a Data Category](#)

Deleting data categories can result in long processing times, changes to the visibility and categorization of articles and questions, and other significant consequences. Read this entire topic carefully before deleting categories.

Keyboard Shortcuts for Data Categories

Use keyboard shortcuts to work quickly with data categories.

Command	Description	Shortcut
Adding a category	Add a sibling to the selected category	Enter
	Add a child to the selected category	Enter+Tab
	Close the Add Category field	Esc
	Save changes in the Add Category field	Enter
Modifying a category	Open the Edit Category field for the selected category	Spacebar
	Close the Edit Category field	Esc
	Save changes in the Edit Category field	Enter
Demoting or promoting a category	Demote a category down one level, as a child of the sibling currently above it	Tab
	Promote a category up one level, as a sibling to its current parent	Shift+Tab
Deleting a category	Delete the selected category and its children	Delete
Navigating in the category hierarchy	Move the focus up in the category hierarchy	Up Arrow
	Move the focus down in the category hierarchy	Down Arrow
	Collapse children in a parent category	Left Arrow
	Expand children in a parent category	Right Arrow
Canceling or repeating an action	Undo the last action	Ctrl+Z
	Redo the last action	Ctrl+Y
Saving the changes	Save the last changes in the category hierarchy	Ctrl+S

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Data categories and answers are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions.

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Create and Modify Category Groups

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. To create a category group, click **New** in the Category Groups section.
By default, you can create a maximum of five category groups and three active category groups. To edit an existing category group, hover your cursor over the category group name and then click the **Edit Category Group** icon ().
3. Specify the **Group Name** up to a maximum of 80 characters. This name appears as the title of the category drop-down menu on the Article Management and Articles tabs, and, if applicable, in the public knowledge base. The **Group Name** does not appear on the Answers tab.
4. Optionally, modify the **Group Unique Name** (the unique name used to identify the category group in the SOAP API).
5. Optionally, enter a description of the category group.
6. Click **Save**.
You receive an email after the save process completes.

Activating Category Groups

When you add a category group, it's deactivated by default and only displays on the administrative setup pages for Data Categories, Roles, Permission Sets, and Profiles. Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community. In addition to activating the category group, for answers communities you must assign the category group to a zone before the categories are visible on the Answers tab.

To activate a category group so it is available to users, move the mouse pointer over the name of the category group and click the **Activate Category Group** icon ().

You can now [add categories](#) to your category group. When you create a category group, Salesforce automatically creates a top-level category in the group named **A11**. Optionally, double-click **A11** to rename it.

EDITIONS

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USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:

- Manage Data Categories

Delete and Undelete Category Groups

Deleting a category group deletes all of its categories and removes all associations between the categories and articles or questions. Read this entire topic carefully to understand the consequences of deleting category groups.

1. From Setup, enter *Data Category* in the Quick Find box, then select **Data Category Setup**.

2. Hover your cursor over the category group name.

3. Click the **Delete Category Group** icon ().

4. Select the checkbox in the confirmation dialog, then click **OK**.

The data category group is deleted. Continue to step 5 if you wish to restore the data category group.

5. In the Removed Category Groups section, hover your cursor over the category group name.

6. Click the **Undelete Category Group** icon (.

The category group moves to the Category Groups section as an inactive category group, and associations with articles, questions, and visibility are restored.

 **Example:** Deleting a category group:

- Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15-day holding period, you can either restore a category group, or permanently erase it immediately.
- Deletes all categories within that group.
- Removes all associations between the group's categories and articles or questions.
- Removes all associations between the group's categories and visibility.
- As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.

EDITIONS

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USER PERMISSIONS

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To create, edit, or delete data categories:

- Manage Data Categories

Add Data Categories to Category Groups

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

Administrators can create data categories for Salesforce Knowledge articles, questions in a zone, or ideas to classify and find articles, questions, or ideas. You can also use data categories to control access to articles, questions, and ideas.

By default, you can create up to 100 categories in a data category group and have up to 5 levels in a data category group hierarchy. To request more categories or hierarchy levels, contact Salesforce.

 **Note:** On the Answers tab, only first-level data categories display. Therefore, when creating data categories for a portal or community, ensure that the categories you want visible have a sibling relationship and not a parent-child relationship.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. Click the category group name.
3. Click a category that is directly above where you want to add a category (a parent), or at the same level (a sibling).
4. Click **Actions**, then select an action: **Add Child Category** or **Add Sibling Category**.
5. Enter a category name up to a maximum of 40 characters.
If possible, Salesforce automatically reuses the name you entered as the **Category Unique Name**, a system field which the SOAP API requires.
6. Click **Add**. Alternatively, press Enter.
7. Click **Save**.
Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

 **Tip:** By default, all Salesforce Knowledge users and zone members can see all categories within an active category group. You can [restrict category visibility](#) after you have set up your data categories to ensure that users only access articles and questions that you want them to see.

EDITIONS

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USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:

- Manage Data Categories

Modify and Arrange Data Categories

Modifying and arranging categories can result in long processing times, changes to the visibility and categorization of articles, and other significant consequences. Read this entire topic carefully before modifying categories.

 **Important:** Modify the category hierarchy when user activity is low. Because the save process involves potentially large and complex recalculations, it might take a long time to complete. During processing, agents might experience performance issues when searching for articles or questions or using category drop-down lists.

1. From Setup, enter *Data Category* in the Quick Find box, then select **Data Category Setup**.
2. Click a category group name.
3. Optionally, click **Expand All** to display the full category hierarchy, or **Collapse All** to display only the top-level categories.
4. To edit a category's name or its unique API name, double-click it.
5. Use drag-and-drop editing to reposition a category in the hierarchy. As you drag, a red icon indicates an invalid destination, while a green icon indicates a valid destination.
 - Drag a category on top of another category to reposition it as a child of the destination category. For example, drag USA on top of North America to make USA one level below North America. After dragging, the category displays below the other child categories at that level.
 - Drag a category to a line that borders another category to reposition it as a sibling of that category. For example, to position USA between Canada and Mexico, drag it to the line between Canada and Mexico.
6. To reorder a category's children in alphabetical order, hover your cursor over its name, then choose *Order Child Categories Alphabetically* from the Actions drop-down list. This reorder only affects the first-level children, not grandchildren or deeper levels.
7. As you modify the category hierarchy, click **Undo** to cancel your last actions. Similarly, click **Redo** to step forward through your flow of performed actions.
8. Click **Save**. You receive an email when the save process completes.

The save process recalculates the following:

- The contents of the category drop-down menu.
- The articles and questions visible to each user.
- The articles and questions associated with categories.

 **Note:** Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

 **Example:**

How Changing the Hierarchy Affects Article Visibility

Changing the category hierarchy potentially changes which articles readers can see. In the example shown in the following graphic, the category PDAs moves from the original parent category Computers to the new parent category Consumer Electronics.

 **Note:** When a category moves to a new parent category, users that have no visibility on the new parent category lose their visibility to the repositioned category.

EDITIONS

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USER PERMISSIONS

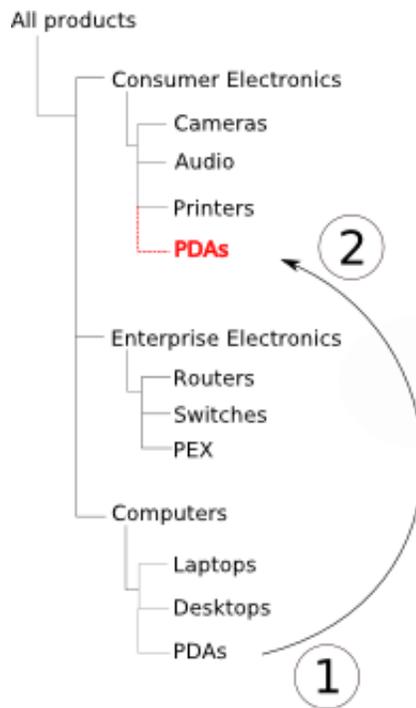
To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:

- Manage Data Categories

Move the Category “PDAs”



To understand how this change affects which readers can see articles classified with the PDAs category, see the following table.

When my role, permission set, or profile is mapped to:	Could I see PDA articles in their old location under Computers?	Can I see PDA articles in their new location under Consumer Electronics?	Why?
All products	Yes	Yes	When your role, permission set, or profile is mapped to the top-level “All products” category, you can see everything in the category hierarchy.
Computers	Yes	No	You don't have access to the branch of the category hierarchy where PDAs is now located.
Consumer Electronics	No	Yes	PDAs has moved to the branch of the category hierarchy where you have been granted access.

How Changing the Hierarchy Affects Article Classification

Classifying an article with a parent category implicitly grants access to that category's children. You cannot explicitly apply both a parent category and one of its children to an article. From the article edit page, selecting a parent category grays out its child categories—you cannot select them in addition to the parent category. Salesforce respects this fact when you move a category to a new parent. It prevents explicitly adding a child category to an article when the new parent category is already present.

In the example depicted above, the category PDAs moves from the original parent category Computers to the new parent category Consumer Electronics. As a result, articles' classifications might or might not change:

- Articles formerly classified with both Consumer Electronics and PDAs lose PDAs, because having Consumer Electronics now implies having PDAs.
- Articles formerly classified with only Consumer Electronics but not PDAs do not change. Access to PDAs is now implied.
- Articles formerly classified with only PDAs, but not Consumer Electronics, retain PDAs.

Delete a Data Category

Deleting data categories can result in long processing times, changes to the visibility and categorization of articles and questions, and other significant consequences. Read this entire topic carefully before deleting categories.

 **Important:** Modify the category hierarchy when user activity is low. Because the save process involves potentially large and complex recalculations, it might take a long time to complete. During processing, agents might experience performance issues when searching for articles or questions or using category drop-down lists.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. Click a category group name.
3. Click a category name. If necessary, click **Expand All** to display all categories in the category group.
4. Press DELETE, or choose **Delete Category** from the Actions drop-down list.
5. Click **OK** in the confirmation dialog box.
6. Choose how you want to reclassify articles associated with the deleted category or the deleted category's children. In all cases, the articles retain their categories from other category groups.
 - Assign the deleted category's parent category.
 - Assign a different category. You can select any other category in this category group.

 **Note:** The category you select cannot be deleted itself before you save your work.

 - Do not assign the articles a new category in this category group.

Deleting a category:

- Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
- Permanently deletes its child categories.
- As applicable, removes the category and its children from the Answers, Article Management, and Knowledge tabs in all channels, and your company's public knowledge base.
- Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
- Removes its mapping to visibility. Readers lose their visibility to articles and answers associated with the deleted category.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Data categories and answers are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions.

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

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance,** and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:

- Manage Data Categories

Data Category Visibility

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see.

There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

Visibility Setting Enforcement

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.

 **Note:** Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

Category group visibility settings are enforced on the Answers tab, the Article Management tab, the Articles tab in all channels (internal app, partner portal, Salesforce.com Community, and Customer Portal), and the public knowledge base. In the following areas, users only see the categories that their visibility settings allow:

- On the Article Management tab, when creating or editing articles
- On the Article Management tab and the Articles tab, the category drop-down menu for finding articles
- On the Answers tab, the categories listed below the zone name

Initial Visibility Settings

If role, permission set, or profile data category visibility has not been set up, all users can see all data categories. However, if data category visibility is set up, users who are not assigned data category visibility by a role, permission set, or profile, only see uncategorized articles and questions unless you make the associated categories visible by default. Role, permission set, and profile visibility settings restrict default visibility settings. For example, if a data category is visible by default, it is not seen by a user whose role restricts access to that data category.

 **Note:** If data category visibility is defined with roles, permission sets, and profiles, Salesforce uses a logical OR between the definitions to create a visibility rule for each user.

Role-Based Visibility Setting Inheritance

Child roles inherit their parent role's settings and are kept in sync with changes to the parent role. You can customize and reduce the child role's visibility, but you cannot increase it to be greater than that of the parent role. By default, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers. You can change the category

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group visibility settings for each portal role. Because high-volume portal users don't have roles, you must designate visibility settings by permission set or profile before these users can view categorized articles and questions.

Categorized Article Visibility

User's can see an article if they can see at least one category per category group on the article. For example, consider an article that is classified with *California* and *Ohio* in the Geography category group and *Desktop* in the Products category group:

- If you have visibility on Ohio and Desktop (but not California), you can see the article.
- If you don't have visibility on either California or Ohio but do have visibility on Desktop, you do not see the article.
- If you have visibility on California but not Desktop, you do not see the article.

Revoked Visibility

Data category visibility can be revoked (set to **None**) for a particular category group. Users in the target role, permission set, or profile can only see articles and questions that aren't classified with a category in that category group. For example, if a user's role has revoked visibility in the Geography category group but visibility to the Products category group, he or she can only see articles that have no categories in Geography and are classified with a category in Products. Because an answers zone can only be assigned to one category group, if the Geography category group was assigned to the zone and a member's role visibility was revoked for that group, the member could only see uncategorized questions.

For a detailed example, see [Category Group Article Visibility Settings Examples](#) on page 695

IN THIS SECTION:

[How Category Visibility Differs from Other Salesforce Models](#)

These settings are unique to articles and questions and differ from other Salesforce models

[Category Group Visibility on Roles](#)

The Category Group Visibility Settings related list summarizes which categories users in the role can see, according to category group.

[Modify Default Data Category Visibility](#)

You can edit the default data category visibility.

[Edit Category Group Visibility](#)

You can edit your data category visibility.

[Category Group Article Visibility Settings Examples](#)

Review examples of category group settings for article visibility permissions.

How Category Visibility Differs from Other Salesforce Models

These settings are unique to articles and questions and differ from other Salesforce models

These settings are unique to articles and questions and differ from other Salesforce models:

Exclusive to articles and questions

[Category group visibility settings](#) determine who can access articles and questions. Although they are standard objects, articles and questions do not have organization-wide defaults, sharing rules, or manual record sharing.

Access

Category group visibility settings are based on the user's role, permission set, or profile. Child roles cannot see more categories than their parent role. To change a user's visibility to categories and therefore categorized articles and questions, you must [change the visibility settings for the user's role, permission set, or profile](#), or, if custom data category visibility is not assigned, [make certain categories visible to all users](#).

Broad interpretation of visibility settings

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.

 **Note:** Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

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Category Group Visibility on Roles

USER PERMISSIONS

To view role details:	View Setup and Configuration
To edit and delete roles:	Manage Roles
To edit and delete permission sets and profiles:	Manage Profiles and Permission Sets
To view users:	View Setup and Configuration
To edit users:	Manage Internal Users
To view categories:	View Data Categories
To manage data categories:	Manage Data Categories AND View Data Categories

The Category Group Visibility Settings related list summarizes which categories users in the role can see, according to category group.

To view a role's category visibility setting, from Setup, enter *Roles* in the *Quick Find* box, then select **Roles**, and select a role. To view the category visibility settings for a Customer Portal or partner portal role, from Setup, enter *Users* in the *Quick Find* box, then select **Users** and click the name of the role.

The following table explains the possible values in the Visibility column of the related list:

Visibility	Description
All Categories	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to All Categories .
None	Users cannot see any categories in the category group.
Custom	Users can view a selection of categories in the category group.

In the Category Group Visibility Settings, you can:

- To view a category group's setting details, click its name.
- To [modify a category group's visibility settings](#), click **Edit** next to it.

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Modify Default Data Category Visibility

You can edit the default data category visibility.

1. From Setup, enter *Default Data Category Visibility* in the Quick Find box, then select **Default Data Category Visibility**.
All active and inactive category groups are listed.
2. Pick a category group and click **Edit**.
3. To make all the categories in the category group visible by default, select **All Categories**. To make none of the categories visible by default, select **None**. To make some of the categories visible by default, select **Custom**.
4. If you chose Custom, move categories from the Available Categories area to the Selected Categories area as needed. Selecting a category implicitly includes its child and parent categories as well. Move categories from the Selected Categories area back to the Available Categories area to remove default visibility.

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USER PERMISSIONS

To view categories:

- View Data Categories

To manage data categories:

- Manage Data Categories

AND

View Data Categories

To assign default category groups:

- Manage Data Categories

To modify category group visibility for users:

- Manage Users

Edit Category Group Visibility

You can edit your data category visibility.

- Go to the data category visibility settings page in Setup.
 - For roles: enter *Roles* in the **Quick Find** box, then select **Roles**.
 - For a role on the Customer Portal or partner portal: enter *Users* in the **Quick Find** box, then select **Users**.
 - For permission sets: enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
 - For profiles: enter *Profiles* in the **Quick Find** box, then select **Profiles**.
- Open a data category group for edit.
 - For roles, in the Category Group Visibility Settings related list, click **Edit** next to the category group you want to modify.
 - For permission sets and profiles:
 - Click a permission set or profile name.
 - Click **Data Category Visibility**.
 - Click **Edit** next to the data category group you want to assign.
- Select a visibility setting.

Visibility Setting	Description
All Categories	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to All Categories .
None	Users cannot see any categories in the category group.
Custom	<p>Users see your custom selection of categories. For roles, you can choose from the categories that are visible to the parent role. If the parent role's visibility changes to be less than its child's visibility, the child role's category visibility is reset to its parent's category visibility.</p> <p>To select categories, double-click the category in the Available Categories box. Alternatively, select a category and then click Add. Selecting a category implicitly includes its child and parent categories as well. Categories that are grayed out are not available for selection because their parent has already been selected.</p> <p> Note: When you customize a role, permission set, or profile set to All Categories, first remove All from the Selected Categories box before you select specific categories.</p>

- Click **Save**.

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USER PERMISSIONS

To view categories:

- View Data Categories

To manage data categories:

- Manage Data Categories

AND

View Data Categories

To assign default category groups:

- Manage Data Categories

To modify category group visibility for users:

- Manage Users

Data Category Visibility Best Practices

- When you create a category group, its visibility is defaulted to **All Categories**.
- When you grant visibility to a category, you also grant visibility to its child and parent categories. If you want to give access to all categories in a branch of the category hierarchy, select the top-level category **All Categories**.
- Users who are not assigned to a category's visibility by role, permission set, or profile can only see uncategorized articles and questions unless:
 - The user has the "View all Data" permission.
 - A category group has been made visible to all users on the Default Data Category Visibility page in Setup.
- For role-based visibility, Customer Portal users and partner portal users inherit the role assigned to their account managers by default. You can change the category group visibility settings for each portal role.
- Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community
- For role-based visibility, always set up data category visibility in a top-down approach from the top of the role hierarchy down to the bottom. Give the highest roles the most visibility and give subordinate roles reduced visibility.

Category Group Article Visibility Settings Examples

Review examples of category group settings for article visibility permissions.

There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

These examples are based on two sample category groups, Products and Geography:

 **Note:** Although category group visibility settings are available with answers communities (questions) and Salesforce Knowledge (articles), the examples below apply to articles only. Answers communities support one category group and one data category per question.

Products Category Group

- All Products
 - Consumer Electronics
 - Cameras
 - Audio
 - Printers
 - Enterprise Electronics
 - Routers
 - Switches
 - PEX
 - Computers
 - Laptops

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- Desktops
- PDAs

Geography Category Group

- All Countries
 - Americas
 - USA
 - Canada
 - Brazil
 - Asia
 - China
 - Japan
 - India
 - Europe
 - France
 - United Kingdom
 - Poland

Example 1: A Role Hierarchy

In this example, the Acme Electronics organization manufactures hardware and provides customer support for both consumers and enterprises. The Engineering department is organized by products. The Support department is organized geographically. Europe and the Americas are managed by corporate teams, but Asia is outsourced. Within the corporate and outsourced teams, there are subteams dedicated either to consumer or enterprise support.

The table below shows the categories visible to each role in the Acme Electronics organization, and states whether the visibility settings are inherited from the parent role or if they are [custom visibility settings](#).

Acme Electronics Role Hierarchy	Visible Geographic Categories	Visible Product Categories
CEO	All Countries	All Products
VP of Engineering	All Countries <i>Inherit from CEO</i>	All Products <i>Inherit from CEO</i>
Consumer Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Consumer Electronics <i>Custom</i>
Enterprise Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Enterprise Electronics <i>Custom</i>
Computers Engineering Team	All Countries <i>Inherit from VP of Engineering</i>	Computers <i>Custom</i>

Acme Electronics Role Hierarchy	Visible Geographic Categories	Visible Product Categories
VP of Support	All Countries <i>Inherit from CEO</i>	All Products <i>Inherit from CEO</i>
VP of Corporate Support	Europe, America <i>Custom</i>	All Products <i>Inherit from VP of Support</i>
Director of Corporate Consumer Support	Europe, America <i>Inherit from VP of Corporate Support</i>	Consumer Electronics, Computers <i>Custom</i>
Director of Corporate Enterprise Support	Europe, America <i>Inherit from VP of Corporate Support</i>	Enterprise Electronics, Computers <i>Custom</i>
Outsourced Support	Asia <i>Custom</i>	All Products <i>Inherit from VP of Support</i>
Consumer Support Team	Asia <i>Inherit from Outsourced Support</i>	Consumer Electronics, Computers <i>Custom</i>
Enterprise Support Team	Asia <i>Inherit from Outsourced Support</i>	Enterprise Electronics, Computers <i>Custom</i>

Example 2: Article Visibility

The table below is an in-depth example of how [category visibility settings](#) restrict what users see. This example has three sample users whose category settings are noted in parentheses.

Table 17: Example: How Category Visibility Settings Restrict What Users See

Categories	When User 1's visibility is All countries/Computers, the category is:	When User 2's visibility is America/All products, the category is:	When User 3's visibility is France/None, the category is:
All countries/Laptop	VISIBLE	VISIBLE	NOT VISIBLE
Canada/Computers	VISIBLE	VISIBLE	NOT VISIBLE
USA/All products	VISIBLE	VISIBLE	NOT VISIBLE
Europe/Switches	NOT VISIBLE	NOT VISIBLE	NOT VISIBLE
Europe/No Categories	VISIBLE	NOT VISIBLE	VISIBLE

User 1: The user must be granted visibility in each category that classifies the article, or each category that classifies the article must be visible by default. [In this example, User 1](#) can see Europe, because Europe is the child of All Countries, but he cannot see Switches, because Switches does not belong to Computers. That's why [User 1](#) cannot see articles classified with Europe/Switches.

User 2: When a category is made visible to a user through custom settings or is made visible by default, its child and parent categories are implicitly included; therefore, [User 2](#) can see articles categorized with All Countries because it is the parent category of America. He can also see Articles classified with USA because it is the child of America.

User 3: If a user has no access to the whole category group, he can only see articles that are not categorized in that group. [User 3](#) cannot see the articles categorized with All countries/Laptop because he has no visibility in the category group that includes Laptop, but he can see articles categorized with Europe/No categories.

Work with Salesforce Knowledge

Create and manage your company information and securely share it when and where it is needed.

IN THIS SECTION:

[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.

[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.

[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.

[Insert Article Content into Emails](#)

In the Lightning Knowledge component, agents can directly embed article content into the body of customer emails.

[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.

Search Articles and External Sources on the Knowledge Tab

USER PERMISSIONS

To view articles:	Read on the article type
To create articles:	Manage Articles AND Read and Create on the article type
To edit draft articles:	Manage Articles AND Read and Edit on the article type
To edit published or archived articles:	Manage Articles AND Create, Read, and Edit on the article type
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

EDITIONS

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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](#)

[Salesforce Knowledge Documentation Overview](#)

[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.

 **Note:** You can add promoted search terms to articles in Salesforce Classic only. Articles are promoted in search results in both Salesforce Classic and Lightning Experience.

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](#)
- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create, edit, and delete promoted search terms:

- [Manage Promoted Search Terms](#)

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](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

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](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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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.](#)
- [Insert Smart Links into Articles in Lightning Knowledge](#) on page 705

! **Important:** For legacy Knowledge subscriptions, smart links are based on the channels they are in. Therefore, legacy customers can't add a smart link to an article in another channel. For example, an article on a public knowledge base can't link to an article only published on internal channels. For new Knowledge customers, every article is part of an internal channel and this qualification does not apply.

IN THIS SECTION:

[Insert Smart Links into Articles in Lightning Knowledge](#)

Smart links automatically adjust when the name or URL of an article is changed. You can also insert smart links into articles.

[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](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

EDITIONS

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USER PERMISSIONS

To create articles:

- [Manage Articles](#)

AND

[Read and Create on the article type](#)

Insert Smart Links into Articles in Lightning Knowledge

Smart links automatically adjust when the name or URL of an article is changed. You can also insert smart links into articles.

 **Note:** Rich Text Area (RTA) must be enabled to use smart links.

1. After opening a new or existing article, click the **Smart Link** icon.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

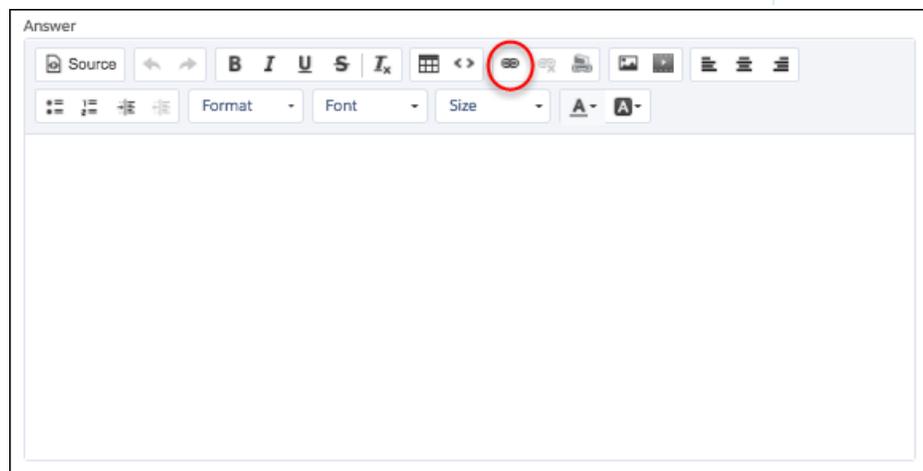
Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

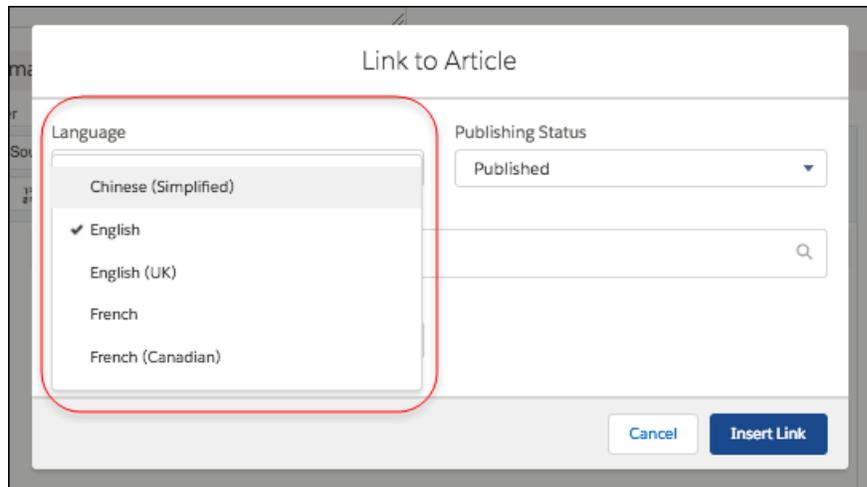
USER PERMISSIONS

To create articles:

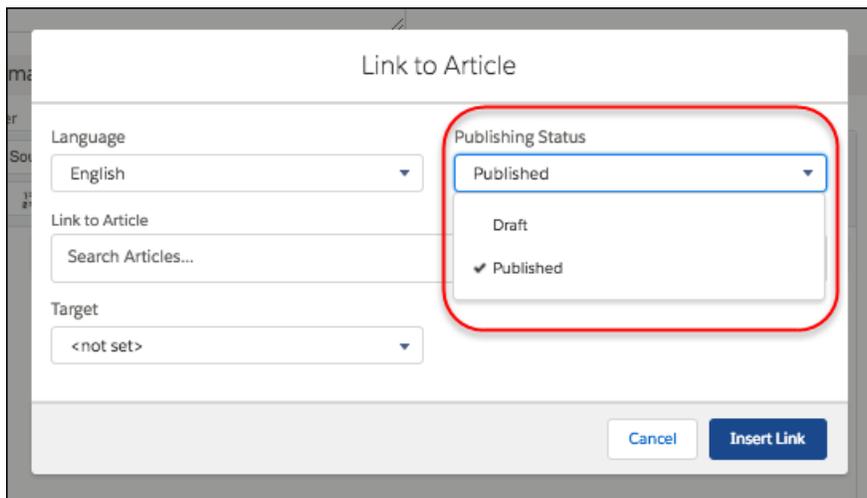
- Manage Articles
- AND
- Read and Create in the user profile



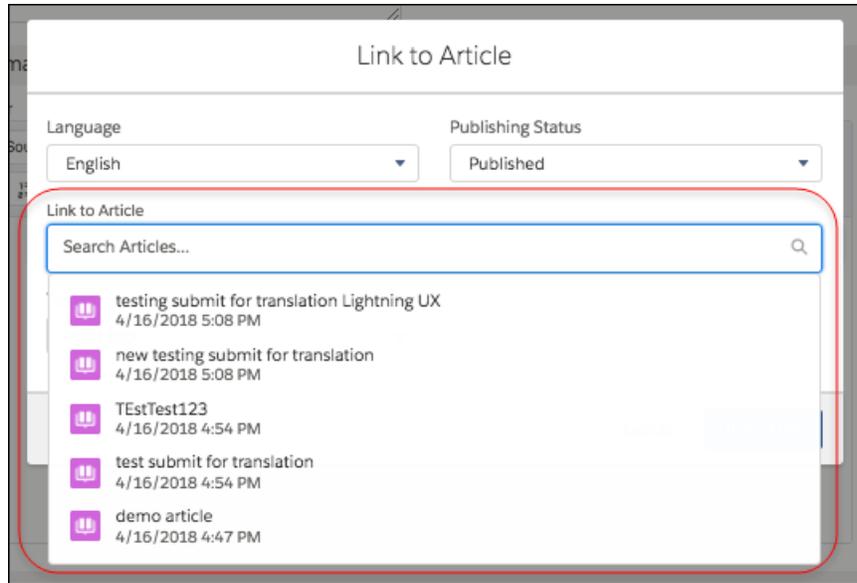
2. In the **Link to Article** filter, select a **Language** from the list of available languages.



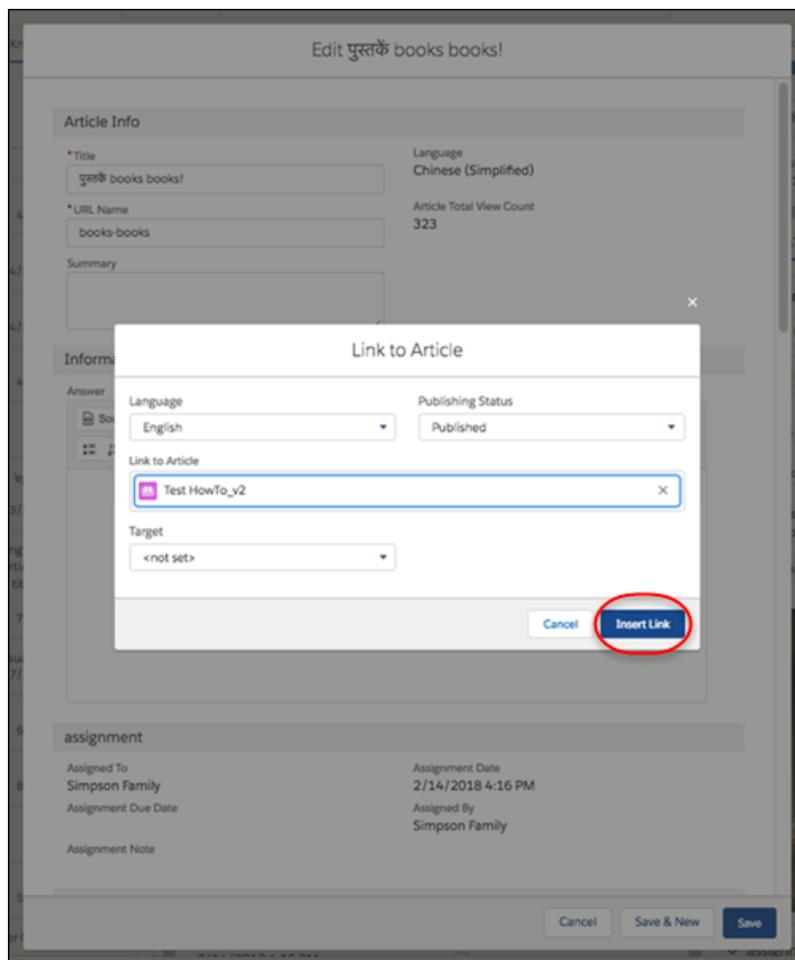
3. Select a **Publishing Status**.



4. Select an article from the **Link to Article** list.



5. When you click **Insert Link**, your selection is added to the article.



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, . 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:** For legacy Knowledge subscriptions, smart links are based on the channels they are in. Therefore, legacy customers can't add a smart link to an article in another channel. For example, an article on a public knowledge base can't link to an article only published on internal channels. For new Knowledge customers, every article is part of an internal channel and this qualification does not apply.

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**.

EDITIONS

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USER PERMISSIONS

To create articles:

- Manage Articles
- AND
- Read and Create on the article type

 **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:

[Smart Links to Salesforce Knowledge Articles with URLs](#)

[Smart Links to Salesforce Knowledge Articles](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

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:** For legacy Knowledge subscriptions, smart links are based on the channels they are in. Therefore, legacy customers can't add a smart link to an article in another channel. For example, an article on a public knowledge base can't link to an article only published on internal channels. For new Knowledge customers, every article is part of an internal channel and this qualification does not apply.
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**.

EDITIONS

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USER PERMISSIONS

To create articles:

- Manage Articles
- AND
- Read and Create on the article type

 **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:

[Smart Links to Salesforce Knowledge Articles Through Search](#)

[Smart Links to Salesforce Knowledge Articles](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

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.

Agents 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

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USER PERMISSIONS

To create, edit, or delete articles:

- Manage Articles
- AND
- Create, Read, Edit, or Delete on the article type

To publish or archive articles:

- Manage Articles
- AND
- Create, Read, Edit, and Delete on the article type

To submit articles for translation:

- Manage Articles
- AND
- Create, Read, and Edit on the article type

To submit articles for approval:

- Permissions vary depending on the approval process settings

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 due 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.

IN THIS SECTION:

[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 in Classic Knowledge](#)

If your organization translates Classic Knowledge articles internally, you can enter the translation from the translation detail page.

[Translate Articles in Lightning Knowledge](#)

If your organization supports a multilingual knowledge base, give agents and authors access to translated articles. Add authoring actions to user profiles so your agents can access master language versions and translation drafts.

[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.

[Set Up Master Article and Translation Side-By-Side View](#)

Look at a translated article and do a side-by-side comparison with the master language version of the article. Admins can add a master article component to the page layout so authors can view the master language version beside the translated article.

SEE ALSO:

[Search Articles and External Sources on the Knowledge Tab](#)

[Create and Edit Articles](#)

[Publish Articles and Translations](#)

[Translate Articles in Classic Knowledge](#)

[Archive Articles and Translations](#)

[Salesforce Knowledge Article Versions](#)

[Delete Articles and Translations](#)

[Articles or Knowledge Tab](#)

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

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 in Classic Knowledge, 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. To publish in Lightning Knowledge, you need the associated User Profile perms.

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.
- 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.

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**) and Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

- 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.

Table 18: Publishing Actions Available in Translated Articles

Action	Translated Article Version Where Action is Exposed
Assign	Draft Master, Draft Translation
Submit for Translation	Draft Master, Published Master
Publish	Draft Master, Draft Translation
Archive	Published Master
Edit	Draft Master, Draft Translation
Edit as Draft	Published Master
Delete	Draft Master, Draft Translation
Change Record Type	Draft Master
Submit for Approval	Draft Master

SEE ALSO:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Translate Articles in Classic Knowledge

If your organization translates Classic 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.

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USER PERMISSIONS

To work with translated articles:

- Manage Articles
- AND
- Create, Read, Edit, or Delete on the article type (depending on the action)

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:

- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Translate Articles in Lightning Knowledge

If your organization supports a multilingual knowledge base, give agents and authors access to translated articles. Add authoring actions to user profiles so your agents can access master language versions and translation drafts.

Depending on the status of your translation, and the authoring actions assigned to your user profile, 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...	Assigns changes to 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	Draft and published translations

EDITIONS

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USER PERMISSIONS

To work with translated articles:

- Manage Articles
- AND
- Create, Read, Edit, Delete, or Article Translation-Submit for Translation (depending on the actions assigned to the user profile)

Action	Description	Article Status
	previewing a Knowledge article.	
Publish...	Publishing translations makes them visible in all channels selected.	Draft translations
Submit for Translation	Creates translation drafts for the current Master Language Version	

To add authoring actions to a page layout created specifically for translations:

1. Click the **Object Manager** tab and select the **Knowledge** object.
2. Select a page layout from the **Page Layout** list. For example, a page layout that has already been created for translated articles.
3. From **Mobile and Lightning Actions**, drag **Publish**, **Edit**, **Delete**, **Assign**, and **Submit for Translation** actions onto the page.
4. Save your changes.

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:

- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

EDITIONS

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Set Up Master Article and Translation Side-By-Side View

Look at a translated article and do a side-by-side comparison with the master language version of the article. Admins can add a master article component to the page layout so authors can view the master language version beside the translated article.

To set up Master Version and Translated Article viewing:

1. From Setup, select the **Object Manager** tab.
2. From the **Object Manager**, select the **Knowledge** object. Then select the **Lightning Record Page**.
3. Click **Edit**, which takes you to the **Lightning App Builder**.
4. Create a Translations tab in the right column and name it, *Translations*.
5. Drag the **Translation Master Article** component onto the new Translations page.
6. Set component visibility filters, as needed. For example, if you set the filter to *Is Master Language Equal False*, then the master article component doesn't show up. When you are on the master language record (and you are not viewing the same version of the article in both columns).

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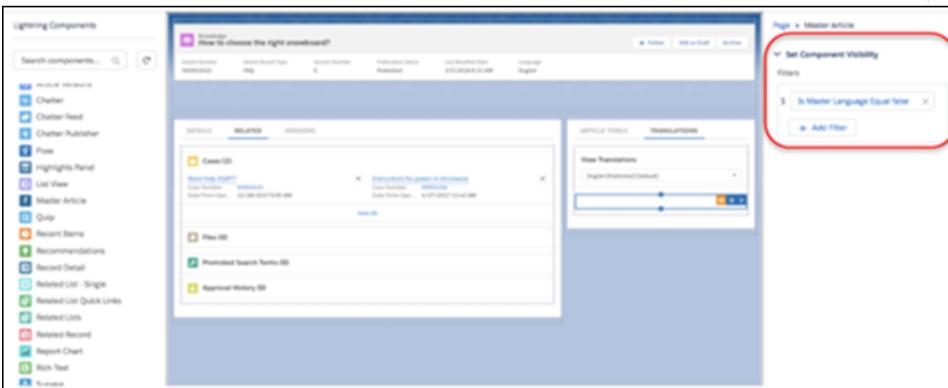
USER PERMISSIONS

To set up:

- Manage Salesforce Knowledge AND Manage Articles

To view articles:

- Allow View Knowledge



7. Save and activate the page.

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:

- [Salesforce Knowledge Documentation Overview](#)
- [Complete Guide to Salesforce Knowledge](#)

Insert Article Content into Emails

USER PERMISSIONS

To administer Salesforce Knowledge and create, edit, and delete page layouts:

Customize Application
AND

Manage Salesforce Knowledge

To send article content in emails in Lightning Knowledge:

Edit on cases
AND

View Setup and Configuration

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

EDITIONS

Available in: Lightning Experience

AND
 Enable, "Share internal Knowledge articles externally"
 AND
 Enable, "Attaching articles inline"
 AND
 SendEmail action should be present in the Case layout
 AND
 HTML or Text should be present in the SendEmail layout
 AND
 Enable CommChannelLayout for email

To send article content in emails in Classic Knowledge:

Edit on cases
 AND
 Enable, "Share internal Knowledge articles externally"
 AND
 Enable, "Attaching articles inline"
 AND
 SendEmail Action should be present in the Case layout

In the Lightning Knowledge component, agents can directly embed article content into the body of customer emails.

Agents can send article content within an email rather than just sending a URL. Your customers can access the information without going to a website. Using the Lightning Knowledge component, agents can send articles that are not published publicly without rewriting or copy and pasting an internal article. Administrators can assign permissions to only those agents with a good knowledge of what is acceptable for an external audience.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
 - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
 - For a layout in the Page Layouts for Case Feed Users section, click  and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose `Edit detail view` to add, change, or remove actions.

3. Under `Articles Tool Settings`, check **Enable attaching articles inline**.
4. Under `Mobile and Lightning Action`, check **SendEmail**.
5. Under `Administrative Permissions`, check **Share internal Knowledge articles, externally**.
6. Under `Email Message Fields`, select **HTML body** and **Text body**.
7. Click **Save**.
8. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.
9. Click the label or name of the article type you'd like to share via email.

10. Under Communication Channel Mappings, click **New** or **Edit**.
11. Enter a Label and Name.
12. Select and add `Email` to the Selected Channels list.
13. Select and add the fields you'd like included in the body of an email.

 **Note:** Smart links can't be included in the email and the following fields are not supported:

- ArticleType
- isDeleted
- Language
- MultiPicklist
- Picklist
- Publish Status
- Source
- Validation Status

14. Click **Save**.
15. Once enabled, go into the service console and click the dropdown beside an article.
16. Select **Insert Article Content into Email** and the content will appear in the body of a customer email.

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

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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:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

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.

EDITIONS

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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 [Classic Knowledge User Access](#) on page 643.

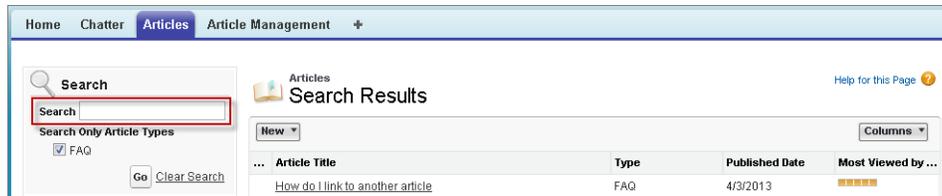
Also, when you use case feed, the Knowledge tab layout is applied to the article sidebar.

 **Note:** Community members without the Knowledge One permission cannot access Knowledge through Communities. They also can't access Knowledge in communities via Salesforce mobile web, Salesforce for Android, or Salesforce for iOS.

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:

[Salesforce Knowledge Documentation Overview](#)

[Complete Guide to Salesforce Knowledge](#)

Einstein Bots for Service Cloud

Build and manage Einstein Bots to ease the load on your service agents. Bots can handle routine requests and free your agents to handle more complex issues. Bots can also gather pre-chat information to save your agents time.

IN THIS SECTION:

[First, What's a Bot?](#)

Technically speaking, a bot is “a computer program which conducts a conversation via auditory or textual methods.”

[Plan Your Einstein Bot](#)

Careful planning is essential to making your bot effective and your customers happy.

[Enable Einstein Bots](#)

On the Einstein Bots setup page, enable bots, manage settings, and view and access your list of bots.

[What Makes Bots Tick?](#)

Bots have many moving parts. But let's start with a few fundamental components in Einstein Bots.

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

[Create a Basic Bot](#)

To get started, create a simple bot with a name, greeting, and menu. Then, use the Einstein Bot Builder to set up dialogs and finish the bot.

[Understand Einstein Bot Dialogs](#)

A dialog is the workhorse of your bot's interaction with your customer.

[Add a Bot Response Delay](#)

Add a delay to every bot response to simulate typing.

[Add a Custom Entity](#)

Entities are pieces of information to collect from customers. For example, dates, times, numbers, locations, email addresses.

[Add a Slot](#)

A slot is a container that stores a specific piece of data collected from the customer. Each slot must be associated with an entity. Since slots are containers of information, they can be used within dialog actions as both inputs and outputs and can be inserted as part of the text in messages.

[Train Your Bot to Understand Your Customers \(Beta\)](#)

Intents are the customer's reasons for interacting with your bot. For example, booking a flight, changing a flight, getting store hours. Associate intents with your dialogs. Then train the bot to create a learning model that your bot can use to understand intents. If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want.

[Add a Bot Options Menu to the Chat Window \(Optional\)](#)

To let your customers know what your bot can do and to provide consistent navigation, add a persistent options menu to the chat window.

[Activate or Deactivate Your Bot](#)

When you're ready to put your bot to work, activate your bot and welcome your new agent to the team!

[Monitor, Analyze, and Refine Bot Activity](#)

Monitor bot performance and view conversation logs on the Performance page.

First, What's a Bot?

Technically speaking, a bot is "a computer program which conducts a conversation via auditory or textual methods."

Thanks, Wikipedia...but bots are so much more:

- Bots are your **allies** in the race to resolve support cases fast. They can even prevent them from being opened in the first place!
- Bots **reduce chat duration** by helping customers self-direct immediately, and resolving common issues without waiting to "get in the queue."
- Bots **save your agents time** (and thus, your company money), allowing agents to devote more time to complex problem-solving and consequential customer interactions.
- Most importantly, bots can be trained to **understand human language**—and respond intelligently—through Natural-Language Processing (NLP).

Bots aren't humans. They can't replace humans. But they can complement the support-chat experience, giving customers a friendly greeting and direct ways to get what they need—fast!

What makes Einstein Bots so smart? Two significant things:

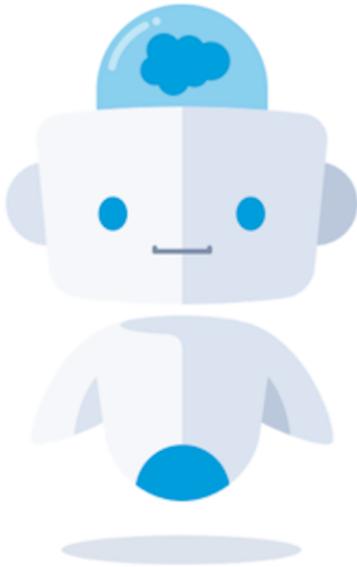
- [Salesforce Einstein](#) and

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

- The power of—and your data in—Salesforce!



IN THIS SECTION:

[Can My Bots Sound like My Company?](#)

Every company has a “voice.” Banks and investment companies sound different from toy companies, which sound different from cosmetic companies...you get the idea.

[What Help Do I Need to Get Botting?](#)

The best people to start with are the people you already have—your service agents.

[Einstein Bots Requirements](#)

Before we can have fun with Einstein Bots, we have to finish a few chores.

Can My Bots Sound like My Company?

Every company has a “voice.” Banks and investment companies sound different from toy companies, which sound different from cosmetic companies...you get the idea.

You want your bot to reflect your company's brand, which means you must consider the language and tone your bot uses.

In a contact center, agents get trained on the company-specific ways to address customers. And guess what? You can “train” your bots to sound like your agents instead of like machines. Here's an example:

Company Style	Sample Greeting
Default bot greeting	“Hi! I’m your helpful bot.”
Formal company bot	“Hello, Ms. Smith. How can we help you?”
Rad company bot	“Hi, Janet! What’s cookin’ today?”

EDITIONS

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We're exaggerating, of course. But even by customizing your initial greeting, you can make your bots sound like your company from the get-go.

This plays out in more detailed ways. One key thing you write when building your bots are bot's messages. They can be customized to match your company's voice and tone. So even though you don't pretend that your bots are humans, you can make them sound an awful lot like your support agents!

Want some more ideas? Check out how we at Salesforce create our voice in our [Writing Style Trailhead module](#), and our corporate [style guide](#).

What Help Do I Need to Get Botting?

The best people to start with are the people you already have—your service agents.

They're on the front lines, so they know your most common issues, and most importantly, how they talk to customers. Depend on your agents for design inspiration and as sounding boards, especially for the words that you put in your bots' mouths.

But it does take a small village to set up bots and keep them running smoothly. Here are some other people you should enlist:

- Service-team managers
- Salesforce administrators
- A data scientist
- ISV partners to help with your AI

Having a robust team with varied expertise will ensure that your bots speak intelligently—and that you can do something with the customer-interaction data they provide.

Also, having a robust team helps you connect to more tools to make your bots smarter. Like [Salesforce Knowledge](#). Or the [IoT \(Internet of Things\) Cloud](#). The better they're connected, the more your bots can know!

Einstein Bots Requirements

Before we can have fun with Einstein Bots, we have to finish a few chores.

1. Obtain a Service Cloud license and a Live Agent license. Each org is provided with 25 Einstein Bots conversations per month for each Live Agent User with an active subscription. To make full use of the Einstein Bots Performance page, obtain the Service Analytics App.
2. [Enable Lightning Experience](#).
3. Run the [Live Agent guided setup flow](#).
4. Enable [Salesforce Knowledge](#) if your Einstein Bot serves Knowledge articles to customers.
5. Publish a [Salesforce community](#) (preferable) or a Lightning Platform site.
6. Provide a [Snap-ins chat](#) button for your customers on your community or site.

EDITIONS

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

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

Plan Your Einstein Bot

Careful planning is essential to making your bot effective and your customers happy.

- Analyze the **issues** your agents are currently addressing and identify common issues the bot can resolve. For example, password reset requests, order status, or routine questions such as store locations and hours.
- To support the questions your Einstein bot answers for your customers, develop a set of **Knowledge articles**.
- Consider a **name** for your bot, such as Codey the Bear, that reflects your company's brand and voice.
- Design a **Welcome greeting** that identifies the bot and clarifies that it isn't a human.
- To identify the things the bot can do and include an option to transfer to a human agent, consider **Main Menu** options.
- Decide if you want to add a **persistent menu** that's always available to your customers at the bottom of the chat window. A Bot Options menu provides a quick way for customers to get to the main bot functions at any point in the chat experience.
- If you plan to let customers type their questions freely in chat, compile a list of the **ways customers ask for help** with these issues. Using this list, compile another list of customer requests that are **out of scope for your bot**. This list helps you smoothly address requests that are out-of-scope.

 **Note:** If you plan to provide a purely menu- or button-driven bot, don't worry about defining customer intents.

EDITIONS

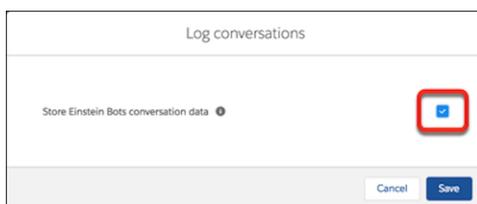
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Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Enable Einstein Bots

On the Einstein Bots setup page, enable bots, manage settings, and view and access your list of bots.

1. From Setup, in the Quick Find box, enter *Einstein Bots*, and then select **Einstein Bots**.
2. In the Settings area:
 - a. To enable Einstein Bots, click the toggle (1).
 - b. To store chat transcripts, including customer data, in the conversation log, click  > **Edit** (2). Then select Store Einstein Bots conversation data.



EDITIONS

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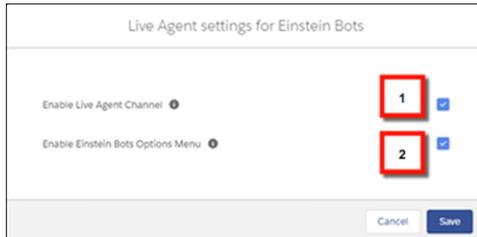
Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

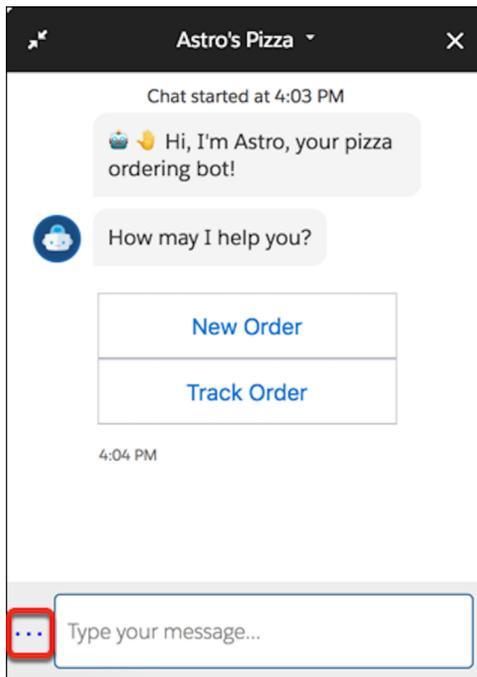
To build and manage Einstein Bots:

- Customize Application and Modify All Data

3. In the Deployment Channels area:
 - a. Click  > **Edit**.
 - b. Select Enable Live Agent Channel (1).
 - c. To provide your customers with a persistent menu of options for interacting with your Einstein Bot, enable the Einstein Bots Options menu (2).



When you create and edit dialogs, you can choose to add them to the Bot Options Menu.



4. Check for an email from Salesforce Einstein Platform Services. Link your Salesforce Einstein Platform Services account to a certificate in your Salesforce org.
If you don't have a certificate yet, from Setup, enter *security* in the Quick Find box, then select **Security > Certificate and Key Management** and click Create Self-Signed Certificate. For more information, see [Generate a Self-Signed Certificate](#).

What Makes Bots Tick?

Bots have many moving parts. But let's start with a few fundamental components in Einstein Bots.

Einstein Bot Component	Description	Example
Dialog	<p>Dialogs are conversation snippets that control what your bot can do. You can associate every dialog with a dialog intent which can be trained to understand variations in customer input. During a conversation with a customer, your bot moves between several different dialogs. Each dialog handles a portion of the conversation. For example, Welcome, Main Menu, Order Status, Location and Hours, and Transfer to Agent are individual dialogs that a customer might experience as part of a single conversation with your bot.</p>	<p>A dialog for "Chat with an agent" ...</p> <p>Customer: "Transfer me to an agent." [or any variations on this phrase]</p> <p>Bot: "No problem. Hang on: I'll connect you with an agent."</p>
Intent	<p>Intents are the customer's reasons for interacting with your bot. For example, booking a flight, changing a flight, getting store hours. Associate intents with your dialogs. Then train the bot to create a learning model that your bot can use to understand intents. If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want.</p> <p> Note: If your customers interact with your bot using only menus or buttons, rather than free-form text input, intents are not needed.</p>	<p>Customer: Where's my order?</p>
Entity	<p>Entities are a type of data that you want to collect from a customer. We provide the</p>	<p>Order number</p> <p>Email address</p>

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

Einstein Bot Component	Description	Example
	following system entities: Text, DateTime, Date, Money, Number, Person, Location, Organization, Percent, Boolean, and Object (standard Salesforce or custom). You can create your own custom entities as needed.	
Slot	A slot is a container that stores a specific piece of data collected from the customer. Each slot must be associated with an entity. Since slots are containers of information, they can be used within dialog actions as both inputs and outputs and can be inserted as part of the text in messages.	If your bot books a flight for a customer, you might create the entity, Airport Code, with two slots, Departure Airport Code and Arrival Airport Code.

Create a Basic Bot

To get started, create a simple bot with a name, greeting, and menu. Then, use the Einstein Bot Builder to set up dialogs and finish the bot.

1. Click **New** and follow the steps to create a basic Einstein Bot.
2. Give your bot a name and description.
Use the description to identify the bot's purpose for future reference. It's not visible to customers.
3. Design a greeting to display to your customers and, optionally, a menu to display in the chat window after the greeting.

 **Tip:** People can usually smell a rat. So we recommend that you identify the bot as a bot, not a human, and let your customers know how the bot can help. For example:

"Hi, I'm Service Bot. Here's how I can help with your order: Place an order, Change an order, Delete an order."

Remember, even though your bot isn't human, your bot's welcome is the first "voice" that many of your customers hear. So keep it conversational, to the point, and consistent with your company's personality.

 **Note:** The menu you display in the chat is different from the [Bot Options menu](#) you can add to your chat window.

Use the Bot Builder menu to navigate between pages (1). The Overview page displays basic information about your bot. To update the bot name and description, click **Edit** (2). The Einstein Intent Management area (3) lets you train your bot to understand intents and keeps track of your bot's training status. The Settings area (4) lets you add a pause before the bot responds to your customers to simulate a human interaction. You can use a preset, optimized delay or create your own. When you're ready to put your bot to work, click **Activate** (5).

EDITIONS

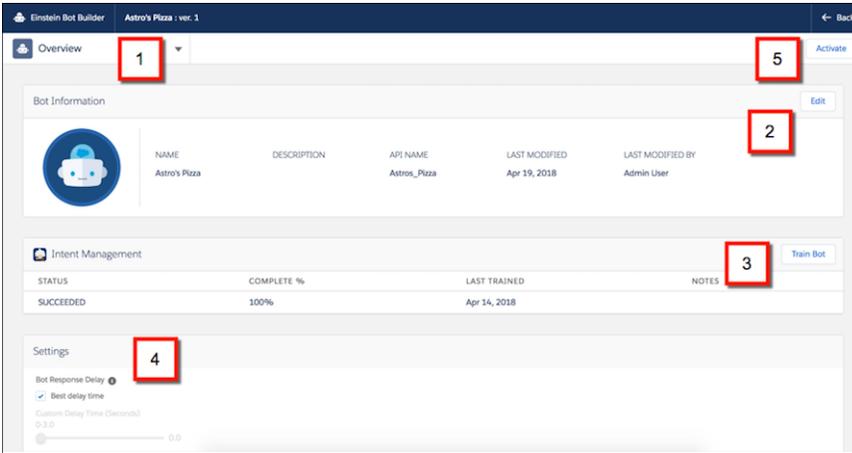
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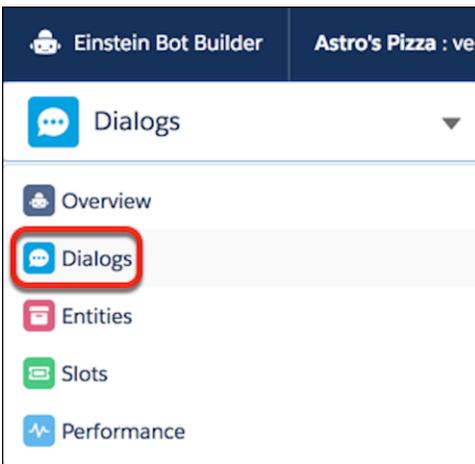
USER PERMISSIONS

To build and manage Einstein Bots:

- **Customize Application and Modify All Data**



- Next, use the Einstein Bot Builder menu to switch to the Dialogs page and start building your bot.



To get started, see [Understand Einstein Bot Dialogs](#).

IN THIS SECTION:

[View and Edit Your Bot's Name and Description](#)

When you create a new bot, you give it a name and an optional description that's not visible to customers. These details can be changed.

View and Edit Your Bot's Name and Description

When you create a new bot, you give it a name and an optional description that's not visible to customers. These details can be changed.

1. In the My Bots list, click  > **Edit** for your new bot.
2. In the Bot Information area, click Edit.



3. Update the name and description for your bot as needed.

Update Bot

*Bot Display Name

Description

Understand Einstein Bot Dialogs

A dialog is the workhorse of your bot's interaction with your customer.

Dialogs are conversation snippets that control what your bot can do. You can associate every dialog with a dialog intent which can be trained to understand variations in customer input. During a conversation with a customer, your bot moves between several different dialogs. Each dialog handles a portion of the conversation. For example, Welcome, Main Menu, Order Status, Location and Hours, and Transfer to Agent are individual dialogs that a customer might experience as part of a single conversation with your bot.

The following illustration gives you an overview of the Dialogs panel.

- It's handy to [organize your dialogs into groups](#) (1).
- Add dialogs and groups as needed (2).
- The first dialog you present to your customer is the Welcome dialog (3). The Einstein Bot Greeting Message that you write when you created the bot is saved as a message in the Welcome dialog. We provide a Welcome dialog to get you started but you can create your own and use the action menu (5) to set it to Welcome.
- The next step the bot performs after displaying the Welcome message is to display the Main Menu dialog (4). Use the Main Menu dialog to present the main capabilities of your bot to your customers. The menu items that you add when you create a bot are saved

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To build and manage Einstein Bots:

- Customize Application and Modify All Data

EDITIONS

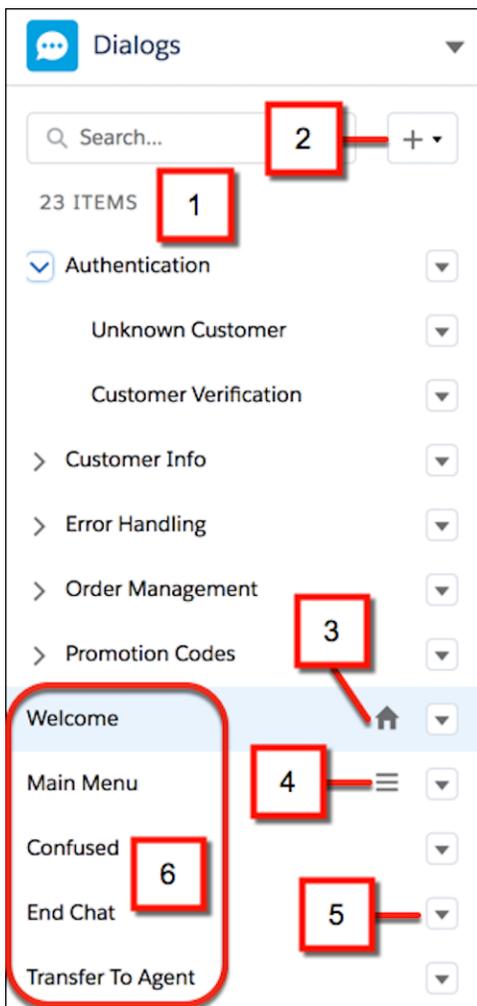
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in the Main Menu dialog. We provide a Main Menu dialog to get you started but you can create your own and use the action menu (5) to set it to Main Menu.

- We provide some basic dialogs to get you started (6). Edit them as needed.

Note: The Confused dialog helps you smoothly address requests that are out of scope for your bot. The messages displayed in this dialog, combined with intent training, are used by the bot to respond whenever it's unable to resolve a customer's input.



Design the way the dialog works by adding one or more of the following elements. Send an outgoing message from the bot to your customers using the Message element. Help the bot gather information from your customers using Question elements. Perform actions on your Salesforce data using Action elements. Perform specific tasks based on certain conditions using Rules elements.



Dialog Element	Description	Example
Message	Displays a message to your customer.	Hi, I'm Fun Bot. My job is to suggest fun activities in your home town.
Question	Gathers information from your customer. Also, Question elements let you present choices for customer responses as buttons or menus.	What town do you live in?
Action	Performs an action on your data.	For example: <ol style="list-style-type: none"> 1. Create, read, update, delete Salesforce objects. 2. Get data to present to the customer. 3. Get external data (from 3rd party API). 4. Start a flow.
Rules	Perform the following specific actions: call a dialog from within the current dialog, redirect to a different dialog, clear a slot value, transfer to an agent, and map values from a pre-chat form to a given slot.	

 **Note:** A bot version can have up to 500 dialogs and up to 50 steps per dialog.

IN THIS SECTION:

[Add a Dialog](#)

Name the dialog and decide whether to include it in the Bot Options menu that's always available to your customers in the chat window.

[Set Up a Dialog](#)

After you add a dialog, set it up by adding elements (outgoing message, question, action, rules) and tell the bot what to do after the dialog finishes. If you're using intents, train the bot to understand the customer intent associated with the dialog.

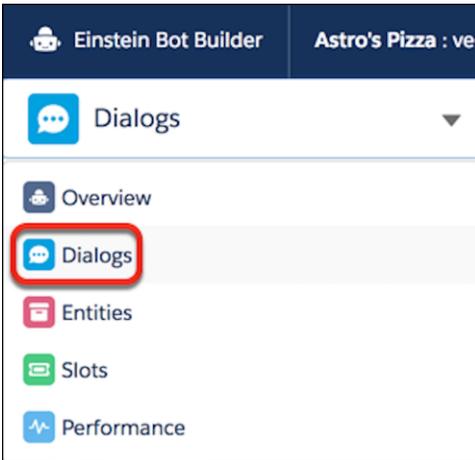
[Work with Dialog Groups](#)

Manage your bot's dialogs with dialog groups.

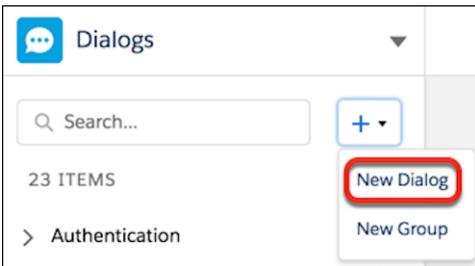
Add a Dialog

Name the dialog and decide whether to include it in the Bot Options menu that's always available to your customers in the chat window.

1. From the Bot Builder menu, click **Dialogs**.



2. In the Dialogs panel, click **New**.



3. Give the dialog a name and API name.
4. To include the dialog in a group of related dialogs, select the group name.
5. To include the dialog in the persistent options menu in the chat window, select **Show in Bot Options Menu**.

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

The screenshot shows the 'New Dialog' configuration form. It has the following fields and options:

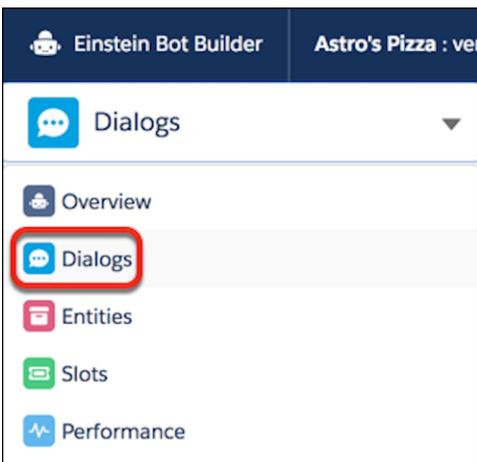
- Name:** A text input field.
- API Name:** A text input field.
- Assign to Dialog Group:** A dropdown menu currently showing 'none'.
- Show in Bot Options Menu:** A checkbox that is currently unchecked and is highlighted with a red circle.
- Buttons:** 'Cancel' and 'Save' buttons are located at the bottom right of the form.

6. Save the new dialog.
7. [Set up the dialog](#) by adding dialog elements.

Set Up a Dialog

After you add a dialog, set it up by adding elements (outgoing message, question, action, rules) and tell the bot what to do after the dialog finishes. If you're using intents, train the bot to understand the customer intent associated with the dialog.

1. From the Bot Builder menu, click **Dialogs**.



2. In the Dialogs panel, click the dialog that you want to set up and click  > **Edit**.

EDITIONS

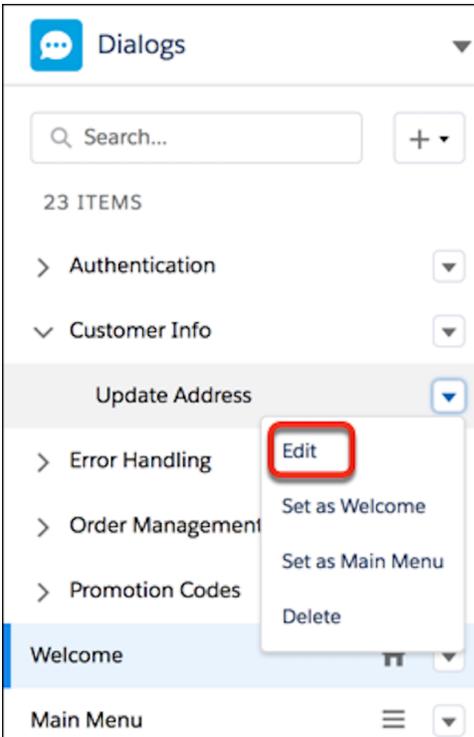
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USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data



If you don't have any dialogs yet, see [Add a Dialog](#).

3. To add an element to the dialog, click  to display the element palette. Then click the element that you want to add.



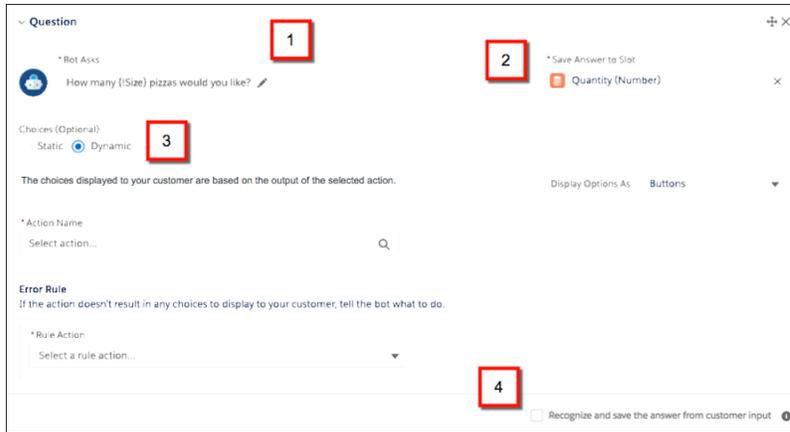
Add any of the following elements:

- To send a message from the bot to your customer, click Message to add a Message element to the dialog. Then enter the outgoing message from your bot to the customer.

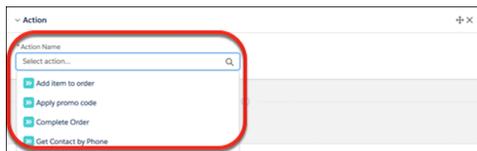


Start the conversation between your bot and your customers with a friendly message that identifies the bot. For example, "Welcome! I'm Service Bot." You can add a menu after the message or redirect the customer to the main menu.

- To gather information from a customer, click Question to add a Question element to the dialog. Then enter the question from your bot to the customer (1) and select the slot to store the answer (2). Use Choices to present buttons or menus that let your customer answer questions quickly (3). Create static choices manually or generate dynamic choices based on the output of a selected action. If you select **Recognize and save the answer from customer input**, the bot skips this question if it can detect the answer from the customer input that triggered the dialog (4).

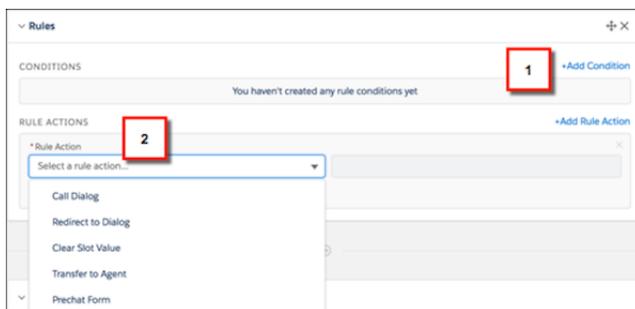


- To create, read, update, or delete Salesforce objects, retrieve data and display it to the customer, retrieve external data from a third-party API, or start a flow, add an Action element to the dialog. Then select the action to perform. Apex classes with invocable methods are available for selection.



Note: To give your bot access to Apex and Salesforce objects, update `sfdc.chatbot.service.permset`. See [Setting Apex Class Access from Permission Sets](#) and [Working with Object Settings in Permission Sets](#).

- Use Rules to specify the conditions that start any of the following actions: call a dialog from within the current dialog, redirect to a different dialog, clear a slot value, transfer to an agent, and save information from fields in prechat forms to specified slots. Add a Rules element to the dialog. Then define the conditions (1) and rule actions (2).



Note: For the best experience for your customers, we recommend that you incorporate pre-chat information gathering into the conversational design of your bot.

If you use Live Agent and Omni-Channel routing, you can use the pre-chat rule action to access custom fields on the Live Agent transcript object that are set by pre-chat APIs.

Drag dialog elements to change their order in the dialog.

- When the bot finishes a dialog, it can wait for customer input, show a menu of options, start another dialog, or transfer the customer to an agent. Tell the bot what to do next.



Note: Each menu item is a dialog. You can build a menu to display or display the Main Menu dialog.

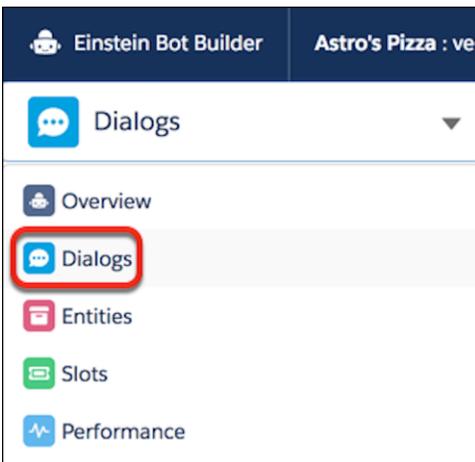
- Save the dialog.

Work with Dialog Groups

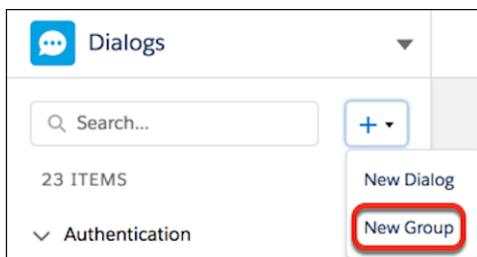
Manage your bot’s dialogs with dialog groups.

Organize related dialogs into dialog groups. Expand and collapse dialog groups to view only the dialogs you need. Drag dialogs to different groups if you reorganize groups.

- From the Bot Builder menu, click **Dialogs**.



- Do either of the following tasks:
 - To add a group, in the Dialogs panel, click **New Group**.



EDITIONS

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

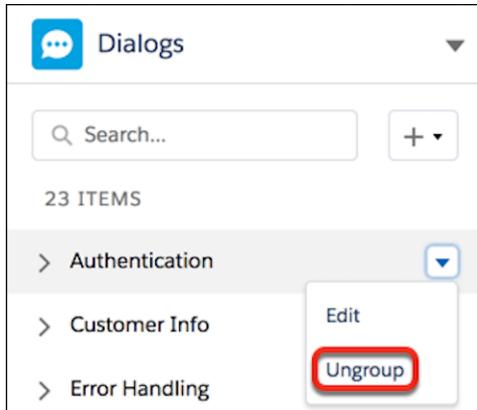
USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

Give the dialog group a name and API name and then save the new group. Drag existing dialogs into or out of this group. You can assign new dialogs to this group when you create them.

- a. To delete a group, right-click the group and click **Ungroup**.

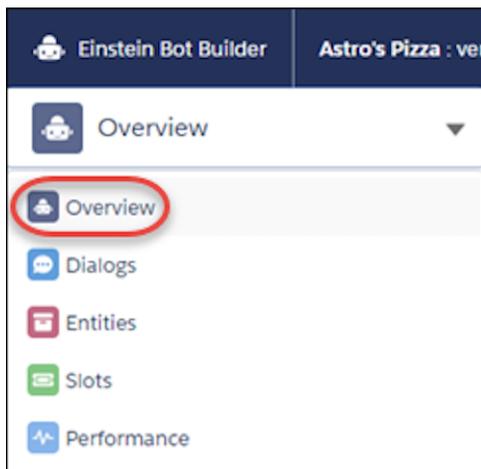


The dialog group is removed and any dialogs that were in the group become ungrouped dialogs in the Dialogs panel. Drag them to other dialog groups as needed.

Add a Bot Response Delay

Add a delay to every bot response to simulate typing.

1. In the Bot Builder menu, click **Overview**.



2. In the Settings area, select **Best delay time** or use the slider to set a custom delay time.

EDITIONS

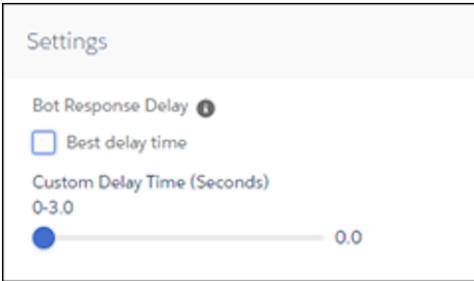
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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data



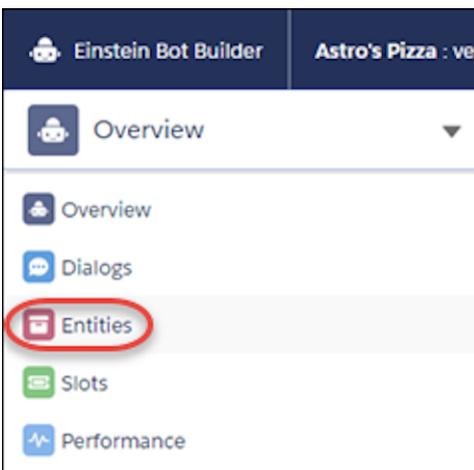
Add a Custom Entity

Entities are pieces of information to collect from customers. For example, dates, times, numbers, locations, email addresses.

Entities are a type of data that you want to collect from a customer. We provide the following system entities: Text, DateTime, Date, Money, Number, Person, Location, Organization, Percent, Boolean, and Object (standard Salesforce or custom). You can create your own custom entities as needed.

Custom entities have a data type of text. The bot can recognize entities in customer input and extract them to a slot. Custom entities support two methods of extraction: regex pattern or a list of values and synonyms.

1. From the Bot Builder menu, click **Entities**.



2. In the Entities list view, click **New**.
3. Provide an entity name and description and select an extraction type for the entity.
 - a. If the entity type is Pattern, optionally enter a regex pattern. If the entity represents something that follows a pattern, such as an order code or email address, you can use a regular expression to capture it from user input. For example, use the following regex to identify an email address in customer input: `\b\w+@[a-zA-Z_]+?\.[a-zA-Z]{2,3}\b`
 - b. If the entity type is Value List, see [Add a Value List Entity](#).
4. Save the entity.

EDITIONS

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

IN THIS SECTION:

[Add a Value List Entity](#)

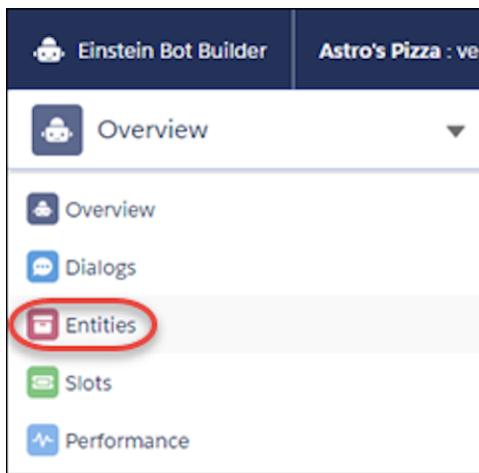
A value list entity provides a way to extract the entity if there is an exact match to a value or a synonym in a list of values.

Add a Value List Entity

A value list entity provides a way to extract the entity if there is an exact match to a value or a synonym in a list of values.

For example, if you sell widgets in the colors red, green, and blue, you can create a value list entity called Color. Then create three value to value list pairs of alternates or synonyms for each color. The bot can recognize any value list value as a match for the color value.

1. From the Bot Builder menu, click **Entities**.



2. In the Entities list view, click **New**.
3. Provide an entity name and select **Value List**.
4. Save the new entity.
5. In the All Entities list view, click > **View** for the new entity.
6. Click **Add**. Enter each value and corresponding value list. Separate value list terms with commas.

EDITIONS

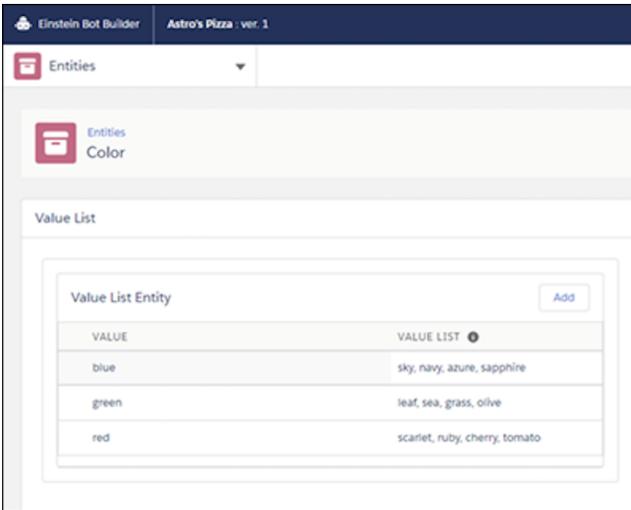
Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

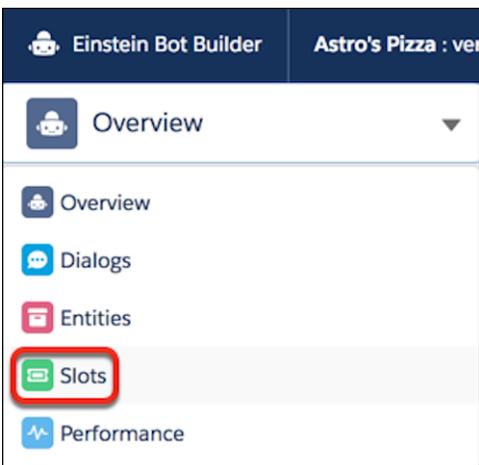


7. Save the entity.

Add a Slot

A slot is a container that stores a specific piece of data collected from the customer. Each slot must be associated with an entity. Since slots are containers of information, they can be used within dialog actions as both inputs and outputs and can be inserted as part of the text in messages.

1. From the Bot Builder menu, click **Slots**.



2. In the Slots list view, click **New**.
3. Enter a slot name.
4. Select the entity type used by this slot or create a new one.
5. Save the slot.

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USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

Train Your Bot to Understand Your Customers (Beta)

Intents are the customer's reasons for interacting with your bot. For example, booking a flight, changing a flight, getting store hours. Associate intents with your dialogs. Then train the bot to create a learning model that your bot can use to understand intents. If your customers interact with your bot by typing a message in the chat window, use intents to help your bot understand what they want.

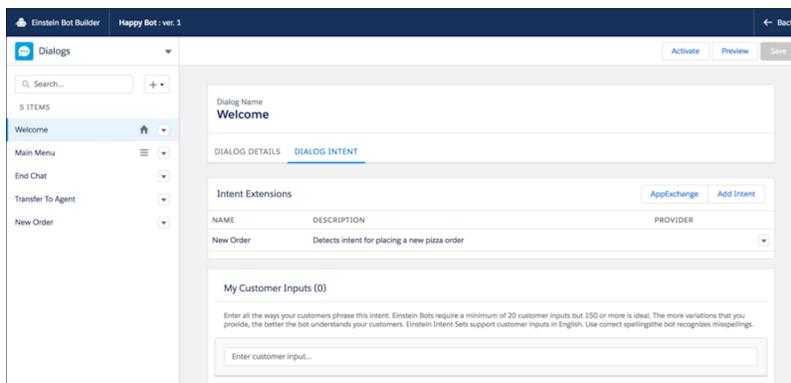
NLU (Natural Language Understanding) features are preview and aren't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

 **Note:** Intents support customer inputs in English only.

Associate an intent with a dialog. For example, a Reset Password dialog could have an associated intent that trains the bot to understand the many ways a customer might express the need to reset a password.

 **Note:** If your customers interact with your bot using only menus or buttons, rather than free-form text input, intents are not needed.

1. From the Bot Builder menu, click **Dialogs**.
2. Click the name of the dialog for which you want to add an intent.
The Dialogs page displays two tabs:
 - Dialog Details—Contains the dialog elements and next step for the bot.
 - Dialog Intent—Contains the customer inputs that define the intent.
3. Click **Dialog Intent**.
4. Select the intent to associate with this dialog.



5. You can also add customer inputs to this dialog intent. Enter as many different ways your customer might ask for help related to this dialog as possible.

EDITIONS

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

USER PERMISSIONS

To build and manage Einstein Bots:

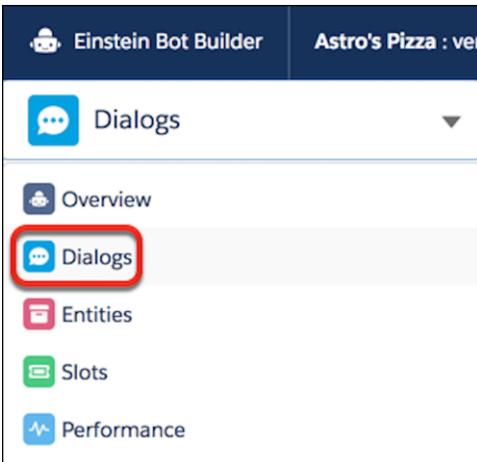
- Customize Application and Modify All Data

6. Save the dialog.
7. Go to the Overview page and click **Train Bot** in the Intent Management section.

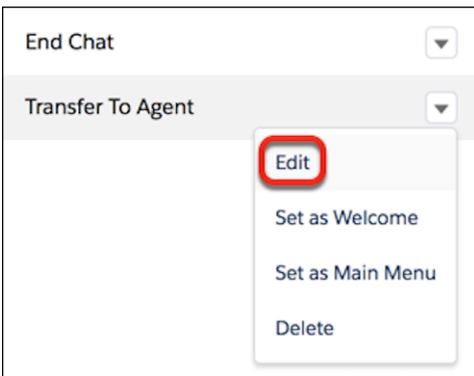
Add a Bot Options Menu to the Chat Window (Optional)

To let your customers know what your bot can do and to provide consistent navigation, add a persistent options menu to the chat window.

1. From the Bot Builder menu, click **Dialogs**.



2. Right-click the dialog you want to add to the bot options menu and then click **Edit**.



3. Select **Show in Bot Options Menu**.

EDITIONS

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

Edit Dialog

* Name
Transfer To Agent

* API Name
Transfer_To_Agent

Assign to Dialog Group
none

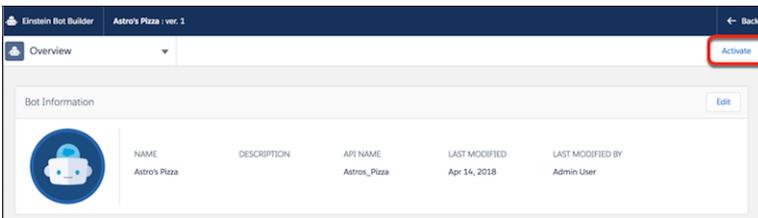
Show in Bot Options Menu

Cancel Save

Activate or Deactivate Your Bot

When you're ready to put your bot to work, activate your bot and welcome your new agent to the team!

1. From any page in the Bot Builder menu, click **Activate**.



The **Activate** button changes to **Deactivate**.

2. To make changes to your bot, you must first deactivate it. Click **Deactivate**.

IN THIS SECTION:

[Preview Your Bot](#)

Preview your Einstein Bot using snap-ins chat.

EDITIONS

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

USER PERMISSIONS

To build and manage Einstein Bots:

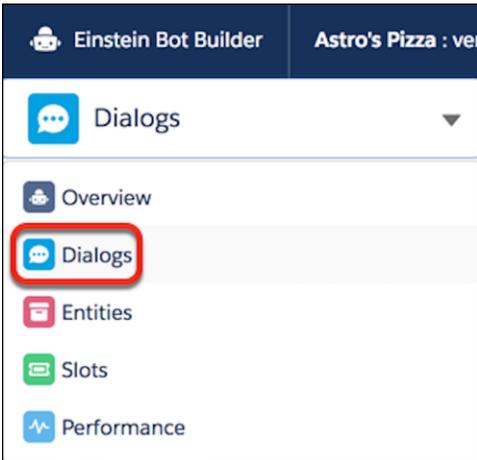
- Customize Application and Modify All Data

Preview Your Bot

Preview your Einstein Bot using snap-ins chat.

 **Note:** To preview your bot, you must first [activate it](#).

1. From the Bot Builder menu, click **Dialogs**.



2. Click **Preview**.



3. Select the snap-in channel for your bot and click **Submit**.

EDITIONS

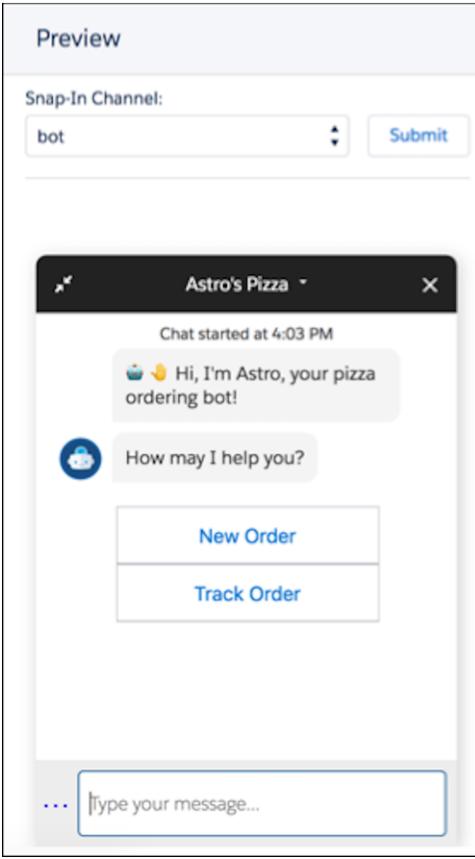
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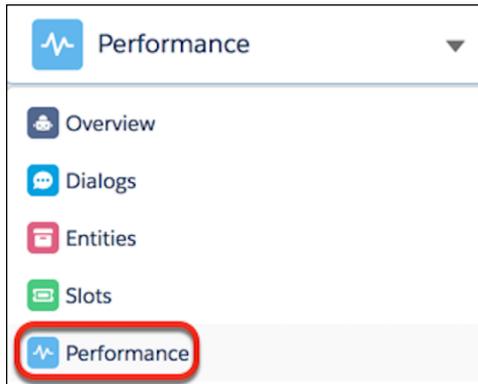


Monitor, Analyze, and Refine Bot Activity

Monitor bot performance and view conversation logs on the Performance page.

Note: To make full use of the Einstein Bots Performance page, obtain and enable [Service Cloud Analytics](#).

- From the Bot Builder menu, click **Performance**.

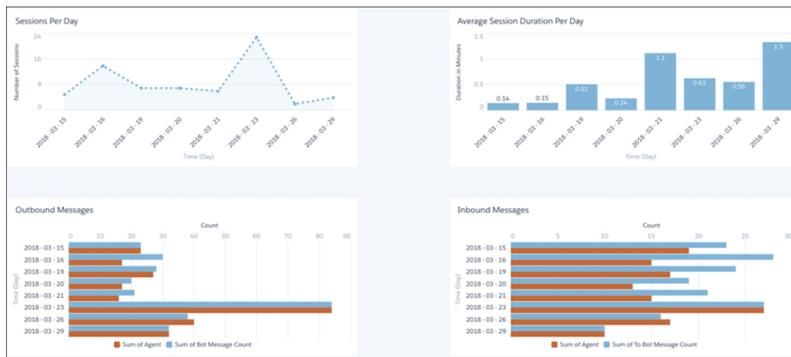


- To monitor bot performance, display the Dashboard tab.

Metrics for the past hour are:

- Total Sessions: The total number of chat sessions (with corresponding transcripts).
- Avg Interactions per Session: The average number of exchanges between the bot and customer per session.
- Avg Duration per Session: Average duration of a session.
- Escalation Rate: Percentage of total sessions that were transferred to a live agent.
- Escalation Drop Rate: The number of attempted escalations to a live agent that failed.

The Bot Performance area displays information for the current bot.



- To view conversation logs, display the Conversation Logs tab.

The conversation log is useful for keeping an eye on session interactions, duration, escalations, and drops. Conversation log information is available for seven days.

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application and Modify All Data

To access analytics:

- Use Analytics

To create, edit, and delete Analytics dashboards:

- Create and Edit Analytics Dashboards

To create, edit, delete, and share Analytics applications:

- Create Analytics Apps

IN THIS SECTION:

[Enable the Einstein Bot Performance Dashboard](#)

Monitor bot performance using an Analytics app on the Performance page.

SEE ALSO:

[Enable Einstein Bots](#)

Enable the Einstein Bot Performance Dashboard

USER PERMISSIONS

To build and manage Einstein Bots:	Customize Application and Modify All Data
To use Service Analytics:	Access Service Cloud Analytics Templates and Apps
To use Analytics templated apps:	Use Analytics Templated Apps
To create and manage Analytics apps:	Manage Analytics Templated Apps
	Edit Analytics Dataflows

EDITIONS

Einstein Bots is available in Salesforce Classic and Lightning Experience. Setup for Einstein Bots is available in Lightning Experience.

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

Monitor bot performance using an Analytics app on the Performance page.

1. Obtain the Service Analytics App.
2. [Set up your org to use the Service Analytics App](#) by enabling Analytics and creating and assigning permission sets.
3. Make sure that your permission set includes Service Analytics Admin.
4. From Setup, in the Quick Find box, enter *Einstein Bots*, and then select **Einstein Bots**. To enable Einstein Bots, click the toggle.

 **Note:** If you already enabled Einstein Bots, toggle the feature off and then back on.

5. Allow some time for Performance dashboard to build.

Field Service Lightning

Field Service Lightning is a powerful, customizable set of features that you can use to set up a mobile-friendly field service hub in Salesforce.

Running a field service business means managing a lot of moving parts. With Field Service Lightning, you get the tools you need to manage work orders, scheduling, and your mobile workforce. Here are some of the things you can do.

- Create service resources and service crews that represent your field service technicians, and add details about their skills, service territories, and availability
- Set up multi-level service territories that represent the regions where your technicians can work
- Track the location and status of your product inventory, warehouses, service vehicles, and customer sites
- Schedule one-time or recurring work orders for customers, and add details about technician preference and required skills and parts
- Create maintenance plans and templates to standardize your field service tasks
- Generate service reports to keep customers informed about service progress

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

What's Included in Field Service Lightning

When Field Service Lightning is enabled, you gain access to a [suite of standard objects](#) that you can find in Setup and as tabs in Salesforce.

If you need advanced scheduling capabilities, download the Field Service Lightning managed package. The managed package builds on the standard objects and includes:

- A scheduling optimizer that allocates resources to appointments in the most efficient way possible by accounting for technician skill level, travel time, location, and other factors
- A dynamic scheduling console that gives dispatchers and supervisors a bird's-eye view of all scheduled appointments
- Out-of-the-box scheduling policies and triggers that help you customize your scheduling model and display preferences

The offline-friendly Field Service Lightning mobile app for iOS and Android makes work a pleasure for technicians in the field, who can update work orders, track parts, gather customer signatures, and connect with dispatchers from their mobile devices. Download the app from the App Store or Google Play.

Ready to get started? The following resources will help you stay organized.

 **Tip:** Check out the [Field Service Lightning Developer Guide](#) for object relationship diagrams, API reference information, and code samples.

IN THIS SECTION:

[Set Up Field Service Lightning](#)

Build and manage your field service processes in one place. Create records representing your workforce and territories, set up work order tracking and inventory management, and customize the Field Service Lightning mobile app to set up your mobile workforce for success.

[Field Service Lightning Considerations](#)

Before you set up Field Service Lightning, review these important considerations about its features.

[Field Service Lightning Guidelines](#)

Learn how and when to use Field Service Lightning features.

[Field Service Lightning Object Fields](#)

Learn about the fields available on Field Service Lightning standard objects.

[Field Service Lightning Managed Package](#)

The Field Service Lightning managed package builds on Salesforce's standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.

Set Up Field Service Lightning

Build and manage your field service processes in one place. Create records representing your workforce and territories, set up work order tracking and inventory management, and customize the Field Service Lightning mobile app to set up your mobile workforce for success.

IN THIS SECTION:

1. [Enable Field Service Lightning](#)

Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.

2. [Give Users Access to Field Service Lightning](#)

To give your team access to Field Service Lightning features, assign the necessary object permissions to users.

3. [Set Up Your Workforce](#)

Create service territories to track the places where your team performs field service work. Then, create service resources and crews to represent your workforce.

4. [Set Up Time Tracking](#)

Establish operating hours for service territories and service resources to indicate when field service work can take place. Use time sheets to track how much time your field service employees spend on tasks.

5. [Set Up Work Orders](#)

A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.

6. [Set Up and Manage Your Inventory](#)

Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job. Whether parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

7. [Set Up Service Reports](#)

Make your customers happy with fast field service reports delivered to their inboxes. Your technicians and dispatchers can create reports for work orders, work order line items, and service appointments and email them directly to the customer. You can use standard templates or create variations of your own.

8. [Set Up Field Service in Communities](#)

Keep customers, partners, and contractors in the loop about field service work. All field service objects can be added to Lightning communities and communities built using the Salesforce Tabs + Visualforce template. Exposing these objects and related objects like assets, accounts, and contacts make it easy for customers to schedule appointments or check field service records straight from their community.

9. [Report on Field Service Lightning](#)

Create report types to track field service activity in your org. To take your reporting a step further, use the Field Service Analytics App.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

10. [Set Up Self-Service Appointment Booking for Field Service Lightning \(Beta\)](#)

Snap-ins Appointment Management (beta) gives your customers an easy way to schedule, modify, and cancel appointments with your mobile workforce. The experience is powered by Visual Workflow, which means you can craft the perfect interaction and decide when and how to create related records like work orders.

SEE ALSO:

[Field Service Lightning Guidelines](#)

[Field Service Lightning Considerations](#)

[Field Service Lightning Managed Package](#)

[Field Service Lightning Mobile App](#)

[Field Service Lightning Developer Guide](#)

Enable Field Service Lightning

Enable Field Service Lightning to start using field service features like work orders, service appointments, and more.

1. From Setup, enter *Field Service Settings* in the Quick Find box, then select **Field Service Settings**.
2. Click **Enable Field Service Lightning**.



Note: If you don't have a Field Service Lightning add-on license, you just see an **Enable Work Orders** option, which is on by default.

3. Click **Save**.
4. If you want, select the option to turn on in-app notifications for the Salesforce app and Lightning Experience users when any of the following actions occurs on a work order or work order line item that they own or follow:
 - A text or file post is added
 - A tracked field is updated
 - The record owner changes
 - The resource assignments change on a related service appointment

If the option to track all related objects is selected in your feed tracking settings for work orders, users are also notified when child records of work orders—such as service appointments—are created or deleted.

5. When you set up work types, which are templates for work orders, you can opt to automatically add a service appointment to new work orders or work order line items associated with a work type. Configure the Due Date on auto-created service appointments by indicating how many days past the Created Date it should fall.
6. If you want to use your knowledge base in field service, select the fields that the search engine should scan to suggest articles on work orders or work order line items. Press the Shift key and click the fields you want to select.
7. Click **Save**.



Note: Enabling Field Service Lightning turns on geocoding (location data) for supported features. To learn more, see [Calculating Address Geolocation in Field Service Lightning](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To enable Field Service Lightning:

- [Customize Application](#)

Give Users Access to Field Service Lightning

To give your team access to Field Service Lightning features, assign the necessary object permissions to users.

 **Important:** Field Service Lightning must be enabled.

All users need the Field Service Standard user permission to access field service objects. Most user licenses already include this permission; for the full list of licenses, contact Salesforce Support.

Field Service Lightning also includes three permission set licenses related to the managed package and mobile app:

- Dispatchers need the Field Service Dispatcher permission set license to access the dispatcher console
- Technicians need the Field Service Scheduling permission set license to be included in scheduling optimization
- Mobile users (typically technicians) need the Field Service Mobile permission set license to use the Field Service Lightning mobile app

You don't need a permission set license to access field service objects. For example, inventory managers, admins, and customer support agents probably don't need one.

To give users access to field service features:

1. Create a permission set for each of the three Field Service Lightning permission set licenses.
 - a. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** under **Manage Users**.
 - b. Click **New**.
 - c. Enter a label, API name, and description for your permission set. To keep it simple, use the same name as the permission set license you plan to associate it with.
 - d. Under **Select the type of users who will use this permission set**, select the corresponding Field Service Lightning permission set license.
 - e. Click **Save**.
 - f. On the permission set overview page, under **System**, click **System Permissions**.
 - g. Click **Edit**.
 - h. Enable the corresponding Field Service Lightning permission set license (Field Service Scheduling, Mobile, or Dispatcher).
 - i. Click **Save**.
2. On the permission set overview page, assign the permission set to relevant users. Assigning a permission set automatically assigns the associated permission set license to the user.
3. Update all relevant user profiles to include access to field service objects.
 - a. In Setup, navigate to the profile you want to update and click **Edit**.
 - b. Under Administrative Permissions, select **Field Service Standard**.
 - c. Click **Save**.
 - d. Under Standard Object Permissions on the profile, define the access level to field service objects.

 **Tip:** For a full list of field service objects, see [Field Service Lightning Objects](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To access field service objects:

- Field Service Standard

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

- e. Click **Save**.

SEE ALSO:

- [Give Users Access to the Field Service Lightning Mobile App](#)
- [Let Users Manage Inventory from the Field Service Lightning Mobile App](#)
- [Guidelines for Setting Up Field Service Contractors](#)

Set Up Your Workforce

Create service territories to track the places where your team performs field service work. Then, create service resources and crews to represent your workforce.

IN THIS SECTION:

1. [Configure Service Territory Settings](#)
To control how your team works with service territories, customize page layouts and assign user permissions.
2. [Create Service Territories](#)
Create service territories to organize your workforce and ensure that service resources are assigned to service appointments near their home base.
3. [Configure Service Resource and Service Crew Settings](#)
To control how your team works with service resources and crews, customize page layouts and assign user permissions.
4. [Create Service Resources](#)
Service resources are individual users or groups of users—known as service crews—who can perform field service work. Create service resources so you can assign service appointments to them.
5. [Create Service Crews](#)
Set up teams who can be assigned to field service appointments as a unit. A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.
6. [Set Up Skills for Field Service](#)
Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Configure Service Territory Settings

To control how your team works with service territories, customize page layouts and assign user permissions.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Service Territories tab and service territories	Read on service territories
Create or clone service territories	Create on service territories
Edit service territories	Edit on service territories
Delete service territories	Delete on service territories
Create service territory members	Edit on service resources

2. Customize page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations
Service Resource	Add the Service Territories related list, which shows territories where the service resource can work.
Service Territory	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Child Service Territories: Service territories that represent a subdivision of the current territory – Service Territory Locations: Warehouses, customer sites, or vehicles that are located or operate in the service territory – Service Territory Members: Service resources that work in the service territory

3. Make the Service Territories tab visible to your users.

Users create and manage service territories from the Service Territories tab. You can add the tab to a custom app or instruct users to add the tab in Salesforce.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

Create Service Territories

USER PERMISSIONS

To create service territories:	Create on service territories
To view service territory locations:	Read on service territories
To create, update, or delete service territory locations:	Edit on service territories
To view service territory members:	Read on service territories
To create, update, or delete service territory members:	Edit on service territories

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Create service territories to organize your workforce and ensure that service resources are assigned to service appointments near their home base.

Service territories typically represent geographical areas where your field service team works.

However, you may decide to create functional territories, such as field sales versus field service. You can also organize service territories into hierarchies.



Tip: If you plan to build out a hierarchy of service territories, create the highest-level territories first. A hierarchy of service territories can have up to 10,000 territories.

1. From the Service Territories tab, click **New**.
2. Select **Active** to be able to add members to the territory or associate it with work orders, work order line items, or service appointments.
3. Enter a name and description for your territory.
For example, enter the name of a county or district.
4. Optionally, enter an address.
You may want to enter the address of the territory's headquarters.
5. If your territory is part of a larger territory, select a parent territory.
6. Select operating hours for the territory, which indicate when service appointments within the territory should take place.
For help, see [Create Operating Hours](#).
7. Click **Save**.

8. Assign service resources to your territory from the Service Territory Members related list.

Service territory members are service resources who are available to work within the territory. If you haven't created service resources yet, you can also define a service resource's territories from the resource's detail page.

Service resources use their territory's operating hours by default, but you can define different hours for resources.

When you add a member, indicate whether this territory is the member's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.

9. Optionally, assign locations to the territory from the Service Territory Locations related list. For example, if a warehouse is located within the service territory and has a corresponding location record, you can add it.

 **Example:** Create a hierarchy of territories to represent the areas where your team works in California. Include a top-level territory named *California*, three child territories named *Northern California*, *Central California*, and *Southern California*, and a series of third-level territories corresponding to California counties. Assign service resources to each county territory to indicate who is available to work in that county.

SEE ALSO:

[Service Territory Fields](#)

[Guidelines for Setting Up Service Territories](#)

Configure Service Resource and Service Crew Settings

To control how your team works with service resources and crews, customize page layouts and assign user permissions.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Service Resources tab and service resources	Read on service resources
Create service resources	Create on service resources
Create service crews	Create on service crews
Create, update, or delete service crew members	Edit on service crews
Edit or deactivate service resources	Edit on service resources

2. Customize page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations
Service Resource	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • If you intend to create service crews, update the field-level security settings of the Service Crew field so it's not hidden. Then, add the field to service resource page layouts and make sure that the User field is not marked required. This allows you to create service resources that represent service crews so they can be assigned to service appointments. <p> Note: Though the User and Service Crew fields won't be marked required in the UI, a built-in validation ensures that service resource records can't be saved unless one of the fields is filled out.</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

Page Layout	Recommended Customizations
	<ul style="list-style-type: none"> • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Absences: The service resource’s absences – Capacities: The service resource’s capacity, or how much they can work in a specified time period – Service Appointments: Service appointments assigned to the service resource – Service Crews: Service crews that the service resource belongs to – Service Territories: Service territories where the service resource is available to work – Skills: The service resource’s skills, which represent certifications and areas of expertise – Time Sheets: Time sheets that track the service resource’s time at work
Service Crew	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your page layout has the Service Crew Members related list. • If you’re using the Field Service Lightning managed package, update the field-level security settings of the Gantt Label field on the Service Crew Member object so it’s not hidden. Then, add the field to the Service Crew Member page layout.

3. Make the Service Resources and Service Crews tabs visible to your users.
Users create and manage service resources and crews from these tabs. You can add a tab to a custom app or instruct users to add it in Salesforce.

Create Service Resources

USER PERMISSIONS

To create service resources:	Create on service resources
To deactivate service resources:	Edit on service resources
To view resource capacities:	Read on service resources
To create, update, or delete resource capacities:	Edit on service resources
To view service resource skills:	Read on service resources
To create, edit, or delete service resource skills:	Edit on service resources
To view, create, or update resource absences:	Read on service resources
	 Note: Read Only users with Read permission on service resources can create resource absences.
To delete resource absences:	Edit on service resources

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Service resources are individual users or groups of users—known as service crews—who can perform field service work. Create service resources so you can assign service appointments to them.

1. From the Service Resources tab, click **New**.
2. Enter a name and description.
You may want the name to be the name or title of the associated user or crew.
3. If the resource represents an individual user, select the user in the User field. If the resource represents a service crew, leave the User field blank and select the crew in the Service Crew field. Service resources must list a user or a service crew.
4. If you want to assign the resource to service appointments, select **Active**.
5. Indicate whether the resource is a technician, dispatcher, or crew.
Resources who are dispatchers can't be capacity-based, included in scheduling optimization, or added to service crews. Only users with the Field Service Dispatcher permission set license can be dispatchers.
6. Enter a location if applicable. Service resources might be linked to a location if they manage or operate the location (such as a warehouse or van). A location can't be linked to more than one service resource.
7. Select **Capacity-Based** if the resource is limited to working a certain number of hours or appointments in a specified time period. You can define the resource's capacity in the Capacities related list.
Contractors are likely capacity-based.
8. If you're using the Field Service Lightning managed package with scheduling optimization, select **Include in Scheduling Optimization** to let the scheduling optimizer assign the resource to service appointments.
Only users with the Field Service Scheduling permission set license can be included in scheduling optimization.
9. Click **Save**.

Once a resource is created, add information about their capabilities.

1. In the Service Territories related list, select the territories where the resource is available to work.
Indicate whether each territory is the resource's primary, secondary, or relocation territory. The primary territory is typically the territory where they work most often—for instance, near their home base—while secondary territories are territories where they can be assigned to appointments if needed. Relocation territories represent temporary moves.
For example, a service resource might have the following territories:
 - Primary territory: *West Chicago*
 - Secondary territories:
 - *East Chicago*
 - *South Chicago*
 - Relocation territory: *Manhattan*, for a three-month period
2. If the resource is capacity-based, define their capacity in the Capacities related list.
 - a. Click **New Resource Capacity**.
 - b. Enter a start date and an end date to indicate when the capacity is in effect for the resource. For example, if the capacity represents a six-month contract, enter the contract's start and end dates.
 - c. Specify how much the resource can work:
 - Select the Time Period that the capacity is based on: hours, days, or months. For example, if the resource can work 80 hours per month, select **Month**.

- If you want the resource's capacity to be based on the number of hours worked, fill out Hours per Time Period. For example, if the resource can work 80 hours per month, enter *80*.
- If you want the resource's capacity to be based on the number of service appointments they are assigned to, fill out Work Items per Time Period. For example, if the resource can complete 20 appointments per month, enter *20*.

You must enter a value in at least one of these fields: Hours per Time Period and Work Items per Time Period. If you're using the Field Service Lightning managed package, capacity must be set in hours, and capacity-based service resources can only be associated with one service territory.

- d. Click **Save**. You can set multiple capacities for a resource as long as their start and end dates do not overlap.

! **Important:** If you aren't using the Field Service Lightning managed package, capacity serves more as a suggestion than a rule. Resources can still be as scheduled beyond their capacity, and you aren't notified when a resource exceeds their capacity.

3. In the Skills related list, assign skills to indicate the resource's areas of expertise. For details, see [Assign Skills to Service Resources](#).

SEE ALSO:

[Guidelines for Setting Up Your Workforce](#)

[Service Resource Fields](#)

[Guidelines for Setting Up Field Service Contractors](#)

Create Service Crews

USER PERMISSIONS

To create service crews:	Create on service crews
To create service resources representing crews:	Create on service resources
To assign service crews to service appointments:	Edit on service appointments
To view service crew members:	Read on service crews AND Read on service resources
To create, update, or delete service crew members:	Edit on service crews

EDITIONS

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

Set up teams who can be assigned to field service appointments as a unit. A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.

1. From the Service Crews tab, click **New**.
2. Enter a crew name and size.
3. Save your changes.
4. From the Service Crew Members related list, add service resources to the crew. You can specify start and end dates for crew members and flag the crew leader. Only service resources of the Technician resource type can be added to crews.

**Note:**

- Service resources that belong to a service crew don't receive notifications about assignments or assignment changes. Assignment notifications are only sent to service resources that are assigned individually to appointments.
- You can see who is the crew leader by viewing the Service Crew Members related list or the leader's crew membership record. Leaders don't have extra object permissions.

5. Create a service resource record to represent the crew, which is used to assign the crew to service appointments. Changing a crew's members doesn't affect its service appointment assignments.
 - a. From the Service Resources tab, click **New**.
 - b. Enter a name for the crew.
 - c. Leaving the User field blank, select the crew in the Service Crew lookup field.
 - d. Select a Resource Type of Crew.
 - e. Select **Active** to be able to assign the crew to service appointments.
Service resources that are crews can't be activated unless the crew has at least one active member.
 - f. Skip the scheduling optimization option, which doesn't apply to service crews.
 - g. Save your changes.



Note: You can't activate a crew service resource unless the related service crew contains at least one active member. If you have trouble creating your service resource, review the steps in [Configure Service Resource and Service Crew Settings](#).

6. Assign the crew to service appointments.
 - a. In the Assigned Resources related list on an appointment, click **New**.
 - b. Select the service resource that represents the crew, and fill out the other fields as needed.
 - c. Save your changes.

The crews that a service resource belongs to appear in the Service Crews related list on the resource's detail page. You can also see all service crew memberships in the Service Crew Members tab in Salesforce. A service resource can be a member of multiple crews as long as the membership dates don't overlap.



Tip: To change the fields that appear in the Service Crew Members related list, update the service crew page layout.

SEE ALSO:

- [Service Crew Fields](#)
- [Guidelines for Setting Up Your Workforce](#)
- [Service Crew Scheduling Considerations](#)
- [Group Service Crew Skills](#)
- [Service Crews in the Dispatcher Console](#)

Set Up Skills for Field Service

Assign skills to service resources to indicate the type of work that they can perform. You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work.

IN THIS SECTION:

1. [Configure Skill Settings](#)
To control how your field service team works with skills, customize page layouts and specify who can view and create skills.
2. [Create Skills](#)
To get started with skills for field service, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.
3. [Assign Skills to Service Resources](#)
Assign skills to service resources to track their certifications and areas of expertise.
4. [Group Service Crew Skills](#)
Learn how the Field Service Lightning managed package considers a service crew's skills when scheduling appointments.

Configure Skill Settings

To control how your field service team works with skills, customize page layouts and specify who can view and create skills.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
Create, update, and delete skills in Setup	Customize Application
Assign skills to service resources	Edit on service resources
View resources' skills	Read on service resources
Add required skills to work orders, work order line items, or work types	Edit on work orders, work order line items, or work types
View required skills on work orders, work order line items, or work types	Read on work orders, work order line items, or work types

2. Customize page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

EDITIONS

Available in: Salesforce Classic.

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EDITIONS

Available in: Salesforce Classic.

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USER PERMISSIONS

To edit page layouts:

- Customize Application

To create and edit users:

- Manage Internal Users

Page Layout	Recommended Customizations
Service Resource	Add the Skills related list, which shows skills assigned to a service resource.
Work Order	Add the Skill Requirements related list, which shows skills required to complete the work order.
Work Order Line Item	Add the Skill Requirements related list, which shows skills required to complete the line item.
Work Type	Add the Skill Requirements related list, which shows skills required to complete the type of work.

3. Decide how skill levels should be determined.

Skills assigned to a service resource or to a work order, work order line item, or work type can have a skill level from 0 to 99.99. For example, you can:

- Use the Skill Level field to indicate years of experience.
- Create a matrix that corresponds professional license classes to skill level numbers.



Tip:

- If you'd like to limit potential skill level values, create a validation rule that, for example, only allows multiples of 10.
- Create field-level help that lets your users know how skill level is determined.

SEE ALSO:

[Skill Fields for Field Service](#)

Create Skills

To get started with skills for field service, create basic skills in your org. When you assign skills to service resources or mark them as required on work orders and work types, you can add details like skill level and duration.

1. From Setup in Salesforce Classic, enter *Skills* in the Quick Find box, then select **Skills** under Field Service.
2. Enter a name. For example, *Electrician Certification*.
3. Enter a description.
4. Skip the Assign Users and Assign Profiles sections, which are specific to Live Agent.
5. Click **Save**.

You can now assign the skill to service resources or list it as required on work types, work orders, and work order line items. Resource skills and skill requirements are supported in both Salesforce Classic and Lightning Experience.

SEE ALSO:

[Skill Fields for Field Service](#)

EDITIONS

Available in: Salesforce Classic

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USER PERMISSIONS

To create skills:

- Customize Application

Assign Skills to Service Resources

Assign skills to service resources to track their certifications and areas of expertise.

1. Navigate to the resource that needs a skill assigned.
2. In the Skills related list, click **New Service Resource Skill**.
3. Select a skill. Skills must be created before they can be assigned to a resource; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
5. Enter a start date and, if needed, an end date. For example, if a technician must be recertified in a particular skill every six months, you can enter an end date that's six months later than the start date.
6. Click **Save**. The resource's skill now appears in their Skills related list.

 **Tip:** To make it easier to track a resource's abilities, upload photos of licenses and certifications in the Files section on the resource's detail page.

SEE ALSO:

[Skill Fields for Field Service](#)

[Add Required Skills to Work Orders or Work Types](#)

Group Service Crew Skills

Learn how the Field Service Lightning managed package considers a service crew's skills when scheduling appointments.

Skills can be assigned to service resources of any type—Technician or Crew—and the Field Service Lightning managed package considers skills during appointment scheduling. However, it doesn't automatically consider a service crew's members' combined skills. This means that unless skill are assigned to service crew via the service resource of type Crew, service crews may be under-scheduled.

If you want the scheduling engine to consider a service crew's combined skills—that is, all skills assigned to the service crew members—you can enable skill grouping. This way, if an appointment requires the Drilling skill, a service crew with a member that has the Drilling skill will be considered as a candidate.

From the Field Service Settings tab in the managed package settings, click **Scheduling**, then click **General Logic**. Select **Enable resource skill grouping** and save your changes.

 **Note:**

- When skill grouping is enabled, the scheduling engine calculates the skill set the crew has for the relevant time slot. The skill set is calculated at run-time each time the scheduling engine searches for appointment candidates, because it is dependent on the allocation of the service crew members.

EDITIONS

Available in: Salesforce Classic.

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USER PERMISSIONS

To create, edit, or delete service resource skills:

- Edit on service resources

To view service resource skills:

- Read on service resources

EDITIONS

Available in: Salesforce Classic.

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- If multiple member of a service crew have the same skill, the scheduling engine considers the highest skill level when calculating the crew's combined skill set.

SEE ALSO:

- [Create Service Crews](#)
- [Service Crew Scheduling Considerations](#)
- [Service Crew Fields](#)
- [Service Crews in the Dispatcher Console](#)

Set Up Time Tracking

Establish operating hours for service territories and service resources to indicate when field service work can take place. Use time sheets to track how much time your field service employees spend on tasks.

IN THIS SECTION:

1. [Create Operating Hours](#)
Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.
2. [Set Up Time Sheets](#)
To control how your team works with time sheets, customize page layouts and assign user permissions.
3. [Create Time Sheets](#)
Time sheets let service resources track their time and attendance.

Create Operating Hours

USER PERMISSIONS

To create operating hours:	Create on operating hours
To assign operating hours to service resources:	Edit on service resources
To assign operating hours to service territories:	Edit on service territories
To assign operating hours to accounts:	Edit on accounts
To view time slots:	Read on operating hours
To update, create, or delete time slots:	Edit on operating hours

Define operating hours and assign them to service territories, service territory members, or accounts to indicate their field service hours.

By default, only System Administrators can view, create, and assign operating hours.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

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 **Important:** Before you get started, read [Operating Hours Considerations](#).

1. Click the Operating Hours tab, then click **New**.
2. Enter a name, description, and time zone.
3. Click **Save**.
4. In the Time Slots related list on the operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *Monday 8:00 AM – 12:00 PM* and *Monday 1:00 PM – 5:00 PM*. To establish 24/7 operating hours, create a time slot for each day of the week that begins and ends at 12:00 AM.
5. Assign the operating hours to one or more service territories.
 - a. Navigate to the service territory detail page.
 - b. Select the desired hours in the Operating Hours lookup field on the territory detail page.
 - c. Save your changes.
6. Service resources automatically use their service territory's operating hours. If a resource needs different operating hours than their territory, update their service territory member record to reflect this.
 - a. From the Operating Hours tab, create separate operating hours to assign to the service territory member.
 - b. From the Service Territory Members related list on the service territory, click the Member Number for the territory member whose hours you want to modify.
 - c. Select the desired hours in the Operating Hours field.
 - d. Save your changes.
7. If needed, assign operating hours to accounts. From the account detail page, select the desired hours in the Operating Hours field.

 **Note:** If the Field Service Lightning managed package is installed in your org, the default operating hours used when booking an appointment for an account are set elsewhere. From the Field Service Settings tab, click **Global Actions**, then select **Appointment Booking** and update the operating hours listed there.

SEE ALSO:

[Operating Hours Fields](#)

Set Up Time Sheets

To control how your team works with time sheets, customize page layouts and assign user permissions.

Time sheets make it possible to track service resources' time and attendance. A time sheet covers a defined period of time, such as a week or a month. Each time sheet is made up of time sheet entries, which track specific tasks, travel time, and break time.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
Create or clone time sheets	Create on time sheets
View time sheets and time sheet entries	Read on time sheets
To create, update, or delete time sheet entries:	Edit on time sheets

2. Customize page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations
Service Resource	Add the Time Sheets related list, which is where service resources manage their time sheets.
Time Sheet Entry	Arrange the fields . The default layout includes only some of the available fields.
Time Sheet	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your layout has the Time Sheet Entries related list, which is where service resources track their daily hours.

3. Make the Time Sheets tab visible to your users.

Users create and manage time sheets from the Time Sheets tab. You can add the tab to a custom app or instruct users to add it in Salesforce.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

Create Time Sheets

Time sheets let service resources track their time and attendance.

 **Note:** Field Service Lightning must be enabled in your org.

1. From the Time Sheets tab, click **New**.
2. Use the lookup field to enter a service resource within your org.
3. Enter a start and end date for your time sheet.
If you want to use a different time sheet for each day, enter the same start and end date.
4. In the Time Sheet Entries related list, click **New**.
5. Enter start and end dates and times.
Time sheet entries are for individual activities; for example, travel, dryer repair, or break. Therefore, the start and end dates are usually the same. Only the time changes.
6. Fill in the rest of the fields according to your needs.
7. Click **Save**.

SEE ALSO:

[Time Sheet Fields](#)

Set Up Work Orders

A work order represents work to be performed on your customers' products. Learn how to configure work order settings and create time-saving templates called work types.

IN THIS SECTION:

1. [Configure Work Order Settings](#)
To control how your team works with work orders and work types, customize page layouts and assign user permissions.
2. [Create Work Types](#)
Chances are, your business performs the same tasks for multiple customers. Work types are templates that save you time and make it easier to standardize your field service work.
3. [Create Work Orders](#)
Create work orders to track work to be performed for a customer.
4. [Choose Preferred Service Resources on Work Orders](#)
Designate certain service resources as preferred, required, or excluded on specific accounts or work orders.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create time sheets:

- Create on time sheets

To view time sheet entries:

- Read on time sheets

To create, update, or delete time sheet entries:

- Edit on time sheets

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

5. [Add Required Skills to Work Orders or Work Types](#)

Define skill requirements on work types, work orders, and work order line items to ensure that the work is assigned to a service resource with the right skills.

6. [Set Up Path for Field Service](#)

To guide your team as they complete field service jobs, add an interactive, color-coded progress bar to work orders, work order line items, and service appointments.

7. [Create Service Appointments](#)

Service appointments help you track field service work to be performed for customers. While work orders describe the work to be performed, service appointments are where you add the scheduling and assignment details. You can associate service appointments with several types of records.

8. [Create Maintenance Plans](#)

Create preventive maintenance plans for specific assets so your customers never miss a beat. Maintenance plans let you define how often maintenance visits occur and mass-generate work orders for future visits.

Configure Work Order Settings

To control how your team works with work orders and work types, customize page layouts and assign user permissions.

1. Assign user permissions.

Users Who Will...	Need These Permissions	Permissions Are Auto-Enabled on These Standard Profiles
Enable Field Service Lightning	Customize Application	System Administrator
View the Work Orders tab, work orders, and work order line items	Read on work orders	Read Only, Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Create or clone work orders	Create on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Edit work orders	Edit on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator
Delete work orders	Delete on work orders	System Administrator
Create, clone, edit, or delete work order line items	Edit on work orders	Standard User, Solution Manager, Contract Manager, Marketing User, and System Administrator

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

2. Customize the fields and related lists on the following objects' page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations
Work Order	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Articles: Knowledge articles attached to the work order (available only if Knowledge is set up) – Child Work Orders: The work order's child work orders – Object Milestones: Milestones on the work order (available only if entitlement management is set up) – Products Consumed: Products used during the completion of the work order – Product Requests: Products requested for the work order – Product Request Line Items: Line items on product requests – Products Required: Products needed to complete the work order – Resource Preferences: Preferred, required, or excluded service resources on the work order – Service Appointments: Appointments indicating when the work is scheduled – Service Reports: Reports summarizing the work for customers – Skill Requirements: Skills needed to complete the work order – Time Sheet Entries: Schedule of technicians' time spent on the work order – Work Order Line Items: Subtasks or steps on the work order • Optionally, add your own custom values to the Status picklist field. The Status field comes with these default values: <ul style="list-style-type: none"> – New – In Progress – On Hold – Completed – Cannot Complete – Closed – Canceled <p>When you create a custom value, select a status category that the value falls into. The available status categories match the default status values. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p> • To let users view and modify attached Knowledge articles from the console, in the layout editor, select Custom Console Components and add the Knowledge One widget to the console sidebar (available only if Knowledge is set up). • In Lightning Experience, add the Knowledge component to your detail page layout. This lets users manage linked articles in Lightning experience.

Page Layout	Recommended Customizations
Work Order Line Item	<ul style="list-style-type: none"> • Arrange the fields on page 889. The default layout includes only some of the available fields. • Optionally, add your own custom values to the Status picklist field. The Status field is identical to the Status field on work orders, which is described above. • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Articles: Knowledge articles attached to the line item (available only if Knowledge is set up) – Child Work Order Line Items: The line item’s child line items – Product Request Line Items: Line items on product requests – Product Requests: Products requested for the line item – Products Consumed: Products used during the completion of the line item – Products Required: Products needed to complete the line item – Service Appointments: Appointments indicating when the work is scheduled – Service Reports: Reports summarizing the work for customers – Skill Requirements: Skills needed to complete the line item – Time Sheet Entries: Schedule of technicians’ time spent on the line item • To let users view and modify attached Knowledge articles from the console, in the layout editor, select Custom Console Components and add the Knowledge One widget to the console sidebar (available only if Knowledge is set up). • In Lightning Experience, add the Knowledge component to your detail page layout. This lets users manage linked articles in Lightning experience.
Work Type	<ul style="list-style-type: none"> • Arrange the fields on page 893. The default layout includes only some of the available fields. •  Tip: The Minimum Crew Size and Recommended Crew Size fields are hidden for all users by default. To use them, update their field-level security settings in Setup. • Confirm that your page layout has the desired related lists: <ul style="list-style-type: none"> – Articles: Knowledge articles attached to the work type (available only if Knowledge is set up) – Products Required: The products needed to complete the work. Work orders and work order line items inherit their work type’s required products. – Skill Requirements: The skills needed to complete the work. Work orders and work order line items inherit their work type’s skill requirements. • In Lightning Experience, add the Knowledge component to your detail page layout. This lets users manage linked articles in Lightning experience.

- a. To let users view and manage work orders in a variety of places, add the Work Orders related list to any of the following objects’ page layouts.
- Accounts
 - Assets
 - Cases
 - Contacts

- Entitlements
- Maintenance plans
-  **Note:** To add the Work Orders related list to maintenance plan page layouts, change the field-level security for the Maintenance Plan and Suggested Maintenance Date fields on work orders to make them available to users.
- Return orders
- Return order line items
- Service contracts

3. Make the Work Orders and Work Types tabs visible to your users.

Users create and manage work orders and work types from these tabs. You can add the tabs to a custom app or instruct users to add the tabs in Salesforce.

Create Work Types

Chances are, your business performs the same tasks for multiple customers. Work types are templates that save you time and make it easier to standardize your field service work.

1. From the Work Types tab, click **New**.
2. Enter a name and description. Try to use a name that helps users quickly understand the nature of the records that can be created from the work type. For example, *Annual Refrigerator Maintenance* or *Valve Replacement*.
3. Enter an Estimated Duration, which is how long the work is estimated to take, and a Duration Type of Minutes or Hours.
4. Select a service report template to be applied to service reports for records that use the work type. If a different service report template is specified on the record, that overrides the work type template.
5. Add a Minimum Crew Size and Recommended Crew Size to indicate the desired size of a service crew assigned to the work. For example, specify that the work is best handled by a crew of 3 (recommended), but can be done with just 2 technicians (minimum).

 **Tip:** The crew size fields are hidden for all users by default. If you don't see them, you may need to update their field-level security settings in Setup.

6. If you'd like a service appointment to be automatically created on work orders and work order line items that use the work type, select **Auto-Create Service Appointment**.

 **Note:** By default, the Due Date on auto-created service appointments is seven days after the created date. You can adjust this offset from the Field Service Settings page in Setup.

7. Click **Save**.
8. If the task represented by the work type requires certain skills or certifications, add them in the Skill Requirements related list. Skills must be created before they can be added as required; to learn how, see [Create Skills](#).
9. If certain products are needed to complete the work, add them in the Products Required related list.
10. To attach instructions, specs, or guidelines to records that use the work type, attach knowledge articles in the Articles related list or Knowledge Lightning component.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create work types:

- Create on work types

To apply work types to work orders or work order line items:

- Edit on work orders

11. To apply a work type to a work order or work order line item, select the work type in the Work Type field on the record when creating it. When you add a work type, the record inherits certain settings from the work type.



Example: Suppose you own a window company, and your crew typically needs 90 minutes to install a window. Create a work type with the following settings:

- Name: *Window Installation*
- Description: *Standard installation of single- or double-paned windows*
- Estimated Duration: *90*
- Duration Type: *Minutes*
- Skill Requirements:
 - *Window Installation* with a skill level of *50*
 - *Window Cleaning* with a skill level of *10*
- Products Required: 1 Hammer
- Attach an article named “How to Install a Window”
- Select the option to auto-create a service appointment

When a customer needs a window installed, create a work order for them and select the Window Installation work type in the Work Type field. This auto-populates the work order’s duration, required skills, and required products, attaches the knowledge article, and automatically creates a service appointment on the work order.

SEE ALSO:

[Guidelines for Using Work Types](#)

[Work Type Fields](#)

[Add Required Skills to Work Orders or Work Types](#)

[Track Required Parts](#)

Create Work Orders

Create work orders to track work to be performed for a customer.

1. From the Work Orders tab or the Work Orders related list on a record, click **New**.
 2. Optionally, select a work type. Work types are templates that auto-populate the following settings on work orders:
 - Duration
 - Duration Type
 - Minimum Crew Size
 - Recommended Crew Size
 - Service Report Template
 - Skill Requirements
 - Products Required
 - Auto-creation of a service appointment
 - Attached knowledge articles
 3. Enter the address where the work order is taking place. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
 4. Optionally, select a price book. This lets you select a corresponding price book entry (product) for each work order line item, and is used on Product Consumed records that are associated with price book entries.
 5. If you're tracking pricing on work orders, enter the tax amount. For example, in a work order whose total price is \$200, enter *20* to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
 6. Fill out the remaining [fields](#) as needed.
 7. Click **Save**.
 8. Optionally, add further details in the work order's related lists.
 - a. Create line items via the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and can each have their own active service appointment. Pricing details like discounts and unit price are set at the line item level on work orders.
 - b. Specify which skills are required to complete the work order from the Skill Requirements related list. For details, see [Add Required Skills to Work Orders or Work Types](#).
 - c. Specify which products are required to complete the work order from the Products Required related list.
 - d. Create a service appointment from the Service Appointments related list. Service appointments are where you assign service resources and add scheduling details. Work orders and work order line items can have multiple service appointments.
-  **Note:** If **Auto-Complete Service Appointment** is selected on the associated work type, a service appointment is automatically created when you create the work order. If you are using the Field Service Lightning managed package, we suggest enabling the following settings on the Service Appointment Lifecycle page of the Field Service Settings tab:
- **Derive the Service Appointment due date from its Work Type**

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create work orders:

- Create on work orders

To view work order line items:

- Read on work orders

To create, update, or delete work order line items:

- Edit on work orders

- **Set your default Service Appointment duration to one hour**

SEE ALSO:

[Work Order Fields](#)

[Add Required Skills to Work Orders or Work Types](#)

[Track Required Parts](#)

[Track Consumed Parts](#)

Choose Preferred Service Resources on Work Orders

Designate certain service resources as preferred, required, or excluded on specific accounts or work orders.

Resource preferences serve as a suggestion rather than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.

Work orders inherit their account's resource preferences. If you don't want to establish resource preferences at the account level, just add them to individual work orders.

1. On a work order or account, click **New** in the Resource Preferences related list.
2. Select a service resource. You can't add preferences for service resources who are inactive or dispatchers.
3. Select a preference type: Preferred, Excluded, or Required.
4. Save your changes.



Example:

- If your customer, Ursa Major Solar, has had positive experiences with Alicia, a service resource, create a resource preference on the Ursa Major Solar account that designates Alicia as "Preferred"
- If Ursa Major Solar had a bad experience with Nigel, a service resource, create a resource preference on the Ursa Major Solar account that designates Nigel as "Excluded"
- If Ursa Major Solar purchased a challenging piece of equipment which was installed by Evan, a service resource, create a resource preference on the Ursa Major Solar account that designates Evan as "Required"

Ursa Major Solar's work orders will automatically list those three preferences. This helps the dispatcher know to assign their service appointments to Evan and, if a second technician is needed, to Alicia if she is available. The dispatcher also knows never to assign the account's service appointments to Nigel.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To view resource preferences:

- Read on the parent object (work orders or accounts) AND Read on service resources

To create, edit or delete resource preferences on work orders:

- Edit on work orders AND Read on service resources

To create, edit or delete resource preferences on accounts:

- Edit on accounts AND Read on service resources

Add Required Skills to Work Orders or Work Types

Define skill requirements on work types, work orders, and work order line items to ensure that the work is assigned to a service resource with the right skills.

Adding required skills to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type's required skills. For example, if all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, add that required skill to the Annual Maintenance Visit work type. When it's time to create a work order for a customer's annual fridge maintenance, applying that work type to the work order adds the required skill.

To add a required skill to a work order, work order line item, or work type:

1. Navigate to the record that needs required skills.
2. In the Skill Requirements related list, click **New**.
3. Select a skill. Skills must be created before they can be added as a requirement; to learn how, see [Create Skills](#).
4. Enter a skill level from 0 to 99. 99 based on how your business measures skill level.
5. Click **Save**. The skill now appears in the Skill Requirements related list on the record.

Skill requirements serve more as a suggestion than a rule. You can still assign a work order, work order line item, or related service appointment to a service resource that does not possess the required skills.

If you're using the Field Service Lightning managed package, use matching rules to ensure that appointments are only assigned to service resources who possess the required skills listed on the parent work order.

SEE ALSO:

- [Skill Fields for Field Service](#)
- [Track Required Parts](#)
- [Create Work Types](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To view skill requirements:

- Read on the parent object (work orders or work types) AND Read on skills

To create, edit or delete skill requirements on work orders or work order line items:

- Edit on work orders AND Read on skills

To create, edit or delete skill requirements on work types:

- Edit on work types AND Read on skills

Set Up Path for Field Service

To guide your team as they complete field service jobs, add an interactive, color-coded progress bar to work orders, work order line items, and service appointments.

With Path, your team can quickly see a record's status and how close it is to completion, and update the status by clicking the desired value on the path.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To set up a path:

- Modify All Data

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

The screenshot shows a Salesforce record for a Work Order (ID: 00000002) owned by Sita Nagappan-Alvarez. The record is in the 'In Progress' status. A path is visible with three stages: 'In Progress' (active), 'On Hold', and 'Final Status'. A 'Mark Stage as Complete' button is present. Below the path, there are 'KEY FIELDS' (Subject, Description, Location) and a 'GUIDANCE FOR SUCCESS' section. A red bracket on the right side of the path stages is labeled '1', and a red bracket on the right side of the key fields and guidance section is labeled '2'.

You can set up one path per record type. The steps in a path (1) correspond to the Status picklist values. Help users succeed by displaying up to five key fields and handy step-specific guidance beneath each path step (2).

Several statuses can represent the record's conclusion: Canceled, Cannot Complete, Completed, and Closed. Therefore, the last stage of the path displays as **Final Status** when the record is open. Users are prompted to select a final status from these values when they try to close the record, and the path then shows the selected final status. The order of the path steps is based on the order of the values in the Status picklist, though statuses representing conclusion are grouped in the final step.

Path is available for work orders, work order line items, and service appointments in Lightning Experience and Lightning communities. It isn't available in Salesforce Classic, the Salesforce mobile app, or the Field Service Lightning mobile app.

1. On the *Path Settings* page in Setup, enable Path. Select **Remember User's Path Preferences** to let users decide whether the path remembers its previous state or is always closed when the page loads.
2. If you plan to create a path based on the Status field for a field service object, assign a status category to each status. From the field settings for the object's Status picklist field in Setup, click **Edit** next to a value. Select the corresponding status category and save your changes. Status categories determine which statuses are grouped in the Final Status stage on the path, and are also used in scheduling optimization.

Action	Values	API Name	Status Category	Default
Edit Deactivate	New	New	New	<input checked="" type="checkbox"/>
Edit Del Deactivate	In Progress	In Progress	In Progress	<input type="checkbox"/>
Edit Del Deactivate	On Hold	On Hold	On Hold	<input type="checkbox"/>
Edit Del Deactivate	Completed	Completed	Completed	<input type="checkbox"/>
Edit Del Deactivate	Closed	Closed	Closed	<input type="checkbox"/>
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	<input type="checkbox"/>
Edit Del Deactivate	Canceled	Canceled	Canceled	<input type="checkbox"/>

3. From the Path Settings page in Setup, follow the prompts to create a path for the Work Order, Work Order Line Item, or Service Appointment object. Paths can be based on the Status field or a custom picklist. Optionally, select key fields or add guidance for each step in the path.
4. To add your path to record detail pages in your org, drag the Path component onto the object detail page in Builder.
5. To add your path to a Lightning community, drag the Path component onto the object detail page in Community Builder.

Create Service Appointments

Service appointments help you track field service work to be performed for customers. While work orders describe the work to be performed, service appointments are where you add the scheduling and assignment details. You can associate service appointments with several types of records.

Service appointments can be added to work orders, work order line items, opportunities, accounts, or assets. To create a service appointment:

1. Navigate to the record that the appointment is associated with.
2. In the Service Appointments related list, click **New Service Appointment**.
3. Fill out the General Information section:
 - a. Add an appointment subject and description.
 - b. If needed, update the duration. If the parent record is work order or work order line item, the appointment inherits its duration from its parent.
 - c. Fill out the Earliest Start Permitted and Due Date fields, which together represent the window during which the appointment must be completed. These fields typically represent terms in the customer's service-level agreement.
 - d. In the Service Note field, add notes such as an appointment summary or recommendations. Depending on your settings, these notes might appear on a customer-facing service report.
4. Fill out the Scheduled Times section:
 - a. Add scheduled start and end times. If you're using the Field Service Lightning managed package with the scheduling optimizer, these fields are populated when the appointment is scheduled.
 - b. Define an arrival window, which is the window of time when the technician is expected to arrive at the site. This window is typically larger than the scheduled start and end window to allow time for delays and scheduling changes. You may choose to share the arrival window start and end with the customer, but keep the scheduled start and end internal-only.
5. Assign service resources to the appointment in the Assigned Resources related list. If the parent record is a work order, work order line item, or account, check the parent for any resource preferences.

 **Note:** Service resource who are dispatchers can't be assigned to service appointments.

6. When the technician completes the appointment, have them fill out the Actual Times section to indicate when the appointment started and ended. In addition, they can enter the number of minutes it took to travel to the appointment in the Actual Travel Time field on their assigned resource record.

You can also create service appointments from the Service Appointments tab. Even better, work types have an **Auto-Create Service Appointment** option which, if selected, auto-creates a service appointment on work orders or work order line items that use the work type. For details, see [Create Work Types](#).

SEE ALSO:

[Service Appointment Fields](#)

[Guidelines for Using Service Appointments](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create service appointments:

- Create on service appointments

To create assigned resources:

- Edit on service appointments AND Read on service resources

To update or delete assigned resources:

- Edit on service appointments

Create Maintenance Plans

USER PERMISSIONS

To create maintenance plans:	Create on maintenance plans
To view maintenance assets:	Read on maintenance plans and assets
To create, update, or delete maintenance assets:	Edit on maintenance plans
To generate work orders for a maintenance plan:	Read on assets and work types AND Create on work orders and service appointments
To edit page layouts:	Customize Application

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Create preventive maintenance plans for specific assets so your customers never miss a beat. Maintenance plans let you define how often maintenance visits occur and mass-generate work orders for future visits.

Heads-up: Some multiplication is required. So grab the nearest math whiz, buy 'em a coffee, and fire up Salesforce!

 **Note:** Depending on your page layout settings, you may not see some of these fields.

1. From the Maintenance Plans tab or related list, click **New**.
2. Enter a start date and, if applicable, an end date. For example, you may have a service contract that entitles the customer to two years of maintenance visits. All work orders related to the plan will fall within this date range.
3. Select a work type. Work orders generated from the maintenance plan inherit its work type's duration, required skills and products, and linked articles. Maintenance assets covered by the plan use the same work type, though you can update them to use a different one.
4. Select an account and contact to represent the customer.
5. If the maintenance plan tracks work that's outlined in a service contract, select the service contract. You can associate assets covered by the maintenance plan with contract line items on the service contract.
6. If the maintenance visits will occur at a location that's tracked in Salesforce, such as a customer site, select the location.
7. In the Frequency and Frequency Type fields, enter the desired amount of time between the maintenance plan's work orders. For example, if you've agreed to perform monthly maintenance visits, you need a work order for each visit, so enter 1 and select Months.
8. In the Generation Timeframe and Generation Timeframe Type fields, enter how far in advance you want work orders to be generated at one time. For example, to generate 3 months' worth of work orders at a time, enter 3 and select Months.
9. Enter the date of the first work order in the next batch, which corresponds to the work order's Suggested Maintenance Date. For example, if you want the first maintenance visit to take place on May 1, enter May 1. When you generate work orders, the earliest work order will list a Suggested Maintenance Date of May 1, and the dates on the later work orders will be based on the Generation Timeframe, Frequency, and End Date settings. After each batch is run, if the maintenance plan includes assets, this field auto-updates only on the maintenance assets because batch timing is calculated at the maintenance asset level.

10. Optionally, enter a number of days for the maintenance window start and end. These settings impact the Earliest Start Permitted and Due Date fields on the maintenance plan's work orders' service appointments. If the maintenance window fields are left blank, the service appointment date fields list their work order's suggested maintenance date.

For example, if you enter 3 for both the maintenance window start and end, the Earliest Start Permitted and the Due Date will be 3 days before and 3 days after, respectively, the Suggested Maintenance Date on each work order.

11. If you'd like batches of work orders to be generated automatically whenever the current batch nears completion, select **Auto-generate work orders**. If this option isn't selected, you must click **Generate Work Orders** on the maintenance plan to generate a new batch.

Batch size is based on the generation timeframe, frequency, and number of assets covered by the plan, because a separate work order is created for each maintenance asset for each maintenance date. So if the plan covers two assets and has a generation timeframe of 2 Months and a frequency of 1 Month, four work orders are generated at a time.

12. If you selected the option to auto-generate work orders, you can add details about when new batches should be generated:

- To move up the timing of batch generation, enter a generation horizon. For example, a generation horizon of 5 means a new batch of work orders is generated 5 days before the maintenance plan's Date of the first work order in the next batch. If you don't specify a generation horizon, it defaults to zero.
- If you don't want a new batch of work orders to be generated until the final work order in the current batch is completed, select **Generate new batch upon completion**. A work order is considered completed when its status falls into one of the following status categories: Cannot Complete, Canceled, Completed, or Closed.

13. Enter a title and description for the maintenance plan.

14. Save your changes and give yourself a high five. You're almost there!

15. Add assets covered by the plan in the Assets related list. Maintenance assets inherit their plan's work type and date of the first work order in the next batch.

 **Tip:** To control which fields appear in the related list, edit the Maintenance Assets page layout in Setup.

16. If you didn't select the option to auto-generate work orders, click **Generate Work Orders** on the maintenance plan each time you need to generate a batch of work orders for the plan. Otherwise, they're automatically generated for you.

You can't generate more than 2,500 work orders at a time. You can decrease the number of work orders generated by making one of the following changes:

- Increasing the Frequency value
- Decreasing the Generation Timeframe value
- Removing assets from the maintenance plan

SEE ALSO:

[Maintenance Plan Fields](#)

[Guidelines for Generating Work Orders from a Maintenance Plan](#)

[Configure Work Order Settings](#)

Set Up and Manage Your Inventory

Track and manage the storage, request, transfer, and consumption of every item in your inventory, and ensure that your mobile workforce has the right parts in stock to do their job. Whether parts are transferred from the warehouse to the customer or between technicians, your field service center has it covered.

First, a little vocabulary review! Field service inventory management comes with a full toolbox of features. You can find these features in Salesforce as tabs or related lists:

- **Locations** are places, like warehouses, sites, or work vehicles, where inventory is stored.
- **Product items** represent products in your inventory stored at a particular location, such as bolts stored in a warehouse. Each product item is associated with a product and a location in Salesforce. If a product is stored at multiple locations, the product will be tracked in a different product item for each location.
- **Products required** are products that are needed to complete a work order or work order line item.
- **Products consumed** are product items that were used to complete a work order, and are no longer in your inventory.
- **Product item transactions** describe actions performed on a product item. They're auto-generated records that help you track when a product item is replenished, consumed, or adjusted.
- **Product requests** are orders for products, which you might create when stock is running low.
- **Product request line items** are subdivisions of a product request.
- **Product transfers** track the transfer of product items between inventory locations.
- **Return orders** track the return or repair of products.
- **Return order line items** are subdivisions of a return order.
- **Shipments** represent the shipment of product items between locations.

Now that you've got the important terms under your belt, it's time to configure your org for inventory management.

IN THIS SECTION:

1. [Configure Field Service Location Settings](#)
To control how your team works with locations, which are customer sites or places where inventory is stored, customize page layouts and assign user permissions.
2. [Create Field Service Locations](#)
Locations are places, like warehouses, customer sites, or work vehicles, where inventory is stored. Create locations so you can track the items stored there and restock when necessary.
3. [Configure Parts and Inventory Settings](#)
To control how your team manages inventory, customize page layouts and assign user permissions.
4. [Create Parts](#)
After you customize your field service inventory settings, track where your inventory is stored by creating product items.
5. [Track Required Parts](#)
If a work order needs to be completed by a carpenter with a hand saw, don't assign it to an electrician with a voltmeter! Add required products to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

6. [Track Consumed Parts](#)

Create products consumed to track the use or consumption of items from your inventory.

7. [Request Parts](#)

When your stock gets low or you need a part for a particular work order, create a product request. Product requests can be associated with work orders, work order line items, cases, and accounts. You can specify when and where the parts are needed, and divide the request into line items that each represent a needed part.

8. [Transfer Parts](#)

To fulfill a product request, create a product transfer. Product transfers track the movement of parts from one field service location to another. When you track product transfers in Salesforce, the inventory numbers at your various storage locations update automatically to reflect the transfers.

9. [Create Shipments](#)

To track product items while they're in transit between locations, create shipments. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date.

10. [Create Return Orders](#)

Create return orders to facilitate the return and repair of items that were sold to customers or supplied to field service technicians.

SEE ALSO:

[Let Users Manage Inventory from the Field Service Lightning Mobile App](#)

Configure Field Service Location Settings

To control how your team works with locations, which are customer sites or places where inventory is stored, customize page layouts and assign user permissions.

 **Note:** Field Service Lightning must be enabled in your org.

Your service locations can be as large as a warehouse or as small as a toolbox. They can be your client sites or your service vans. They vary in size, location, and what they contain, and they are unique to your company.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Locations tab and records	Read on locations
Create or clone locations	Create on locations
Edit locations	Edit on locations
Delete locations	Delete on locations
Create addresses for locations	Create on addresses

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

2. Customize the fields and related lists on the following objects' page layouts.

 **Note:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations for Inventory Management
Location	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields.  Important: <ul style="list-style-type: none"> – Add the Inventory Location field so you can track where inventory is stored. – Add the Mobile Location field so you can flag mobile locations such as service vehicles. – If you plan to create location hierarchies, add the Parent Location field, and optionally the read-only Root Location and Hierarchy Level fields. – Optionally, customize the values in the Location Type field. Its out-of-the-box values are Warehouse, Van, Site, and Plant. • Add the Product Items related list, which shows the products stored at a location. • Confirm that your layout includes the desired related lists: <ul style="list-style-type: none"> – The Addresses related list shows addresses related to the location, such as billing and shipping addresses. – The Assets related list shows assets at the location. – The Associated Locations related list shows related accounts. – The Child Locations related list shows locations within the location, such as vehicles which are parked at a warehouse when not in use. – The Maintenance Plans related list shows maintenance plans linked to the location. – The Product Items related list shows product items (inventory) stored at the location. – The Service Territory Locations related list shows related service territories, which usually indicates that the location is within the territory.
Address	<ul style="list-style-type: none"> • Arrange the fields, which appear in the Addresses related list on locations. • Optionally, customize the values in the Address Type field. Its out-of-the-box values are Mailing, Shipping, Billing, and Home.
Associated location	<p>Associated locations let you associate multiple accounts with one location. For example, a shopping center location may have multiple customer accounts.</p> <ul style="list-style-type: none"> • Arrange the fields, which appear in the Associated Locations related list on locations and accounts.

3. Make the Locations tab visible to your users.

Users create and manage service locations from the Locations tab. You can add the tab to a custom app or instruct users to add it in Salesforce.

Create Field Service Locations

USER PERMISSIONS

To create locations:	Create on locations
To view associated locations:	Read on accounts
To create, update, or delete associated locations:	Edit on accounts
To view addresses:	Read on locations
To create, update, or delete addresses:	Edit on locations

Locations are places, like warehouses, customer sites, or work vehicles, where inventory is stored. Create locations so you can track the items stored there and restock when necessary.

 **Note:** Field Service Lightning must be enabled in your org.

1. From the Locations tab, click **New**.
2. Enter a location name.
3. Select a location type:
 - Warehouse (default)
 - Site
 - Van
 - Plant
4. If inventory is stored at the location, select **Inventory Location**. This allows you to you associate the location with items in your inventory, known as product items.
5. If the location can be moved, like a van or tool box, select **Mobile Location**.
6. Complete the other fields as appropriate.
7. Click **Save**.
8. In the Addresses related list, create addresses for the location. The available types of addresses are Mailing, Shipping, Billing, and Home.
9. In the Files related list, attach files like blueprints, photographs, or registration information.

SEE ALSO:

[Location Fields](#)

[Set Up and Manage Your Inventory](#)

[Create Parts](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Configure Parts and Inventory Settings

To control how your team manages inventory, customize page layouts and assign user permissions.

 **Note:** Field Service Lightning must be enabled in your org.

1. Assign user permissions.

Users Who Will...	Need These Permissions
Enable Field Service Lightning	Customize Application
View the Products, Product Items, Product Requests, Product Transfers, Return Orders, or Shipments tab and records	Read on the object
Create, edit, or delete products, product items, product requests, product transfers, return orders, or shipments	Create, Edit, or Delete on the object
Add products required to work orders, work order line items, or work types	Edit on work orders, work order line items, or work types
Create, edit, or delete products consumed on work orders or work order line items	Create on work orders AND Read on product items
View product item transactions	Read on product items
Edit product item transactions	Edit on product items

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To edit page layouts and set field history tracking:

- Customize Application

To create and edit users:

- Manage Internal Users

2. Customize the fields and related lists on the following objects' page layouts.

 **Tip:** If you have your own field service terminology, remember that you can rename an object's tab and labels. In Setup, select **Rename Tabs and Labels**, and enter your own term for the object you'd like to rename.

Page Layout	Recommended Customizations for Inventory Management
Product	<ul style="list-style-type: none"> • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – The Product Items related list shows product items that track the storage of the product in an inventory location. – The Return Order Line Items shows return order line items that track the return or repair of the product. • Define values for the Quantity Unit of Measure picklist field, which comes with one value (Each). These values are reflected in the Quantity Unit of Measure field on product items, product request line items, product transfers, products consumed, and products required. <ol style="list-style-type: none"> From Setup, enter <i>Products</i> in the Quick Find box, then select Fields under Products. Click Quantity Unit of Measure. In the Quantity Unit of Measure Picklist Values related list, click Edit to change the default or New to add values. For example, you may need values like Kilograms or Liters. Save your changes.

Page Layout	Recommended Customizations for Inventory Management
Product consumed	Arrange the fields that appear in the Products Consumed related list.
Product item	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Confirm that your layout includes the Product Item Transactions related list, which automatically tracks the replenishment, consumption, and adjustment of product items.
Product item transaction	Arrange the fields that appear in the Product Item Transactions related list.
Product request	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Draft, Submitted, and Received. • Confirm that your layout includes the following related lists. <ul style="list-style-type: none"> – The Product Transfers related list shows transfers that are created to fulfill the request. – The Product Request Line Items related list shows the request's line items (each associated with a product). – The Return Orders related list shows return orders associated with the request.
Product request line item	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Draft, Submitted, and Received. • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – The Product Transfers related list shows transfers created to fulfill the request. – The Return Order Line Items related list shows return order line items associated with the product request line item.
Product required	Arrange the fields that appear in the Products Required related list.
Product transfer	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Ready for Pickup and Completed. • Confirm that your layout includes the Product Item Transactions related list, which automatically tracks the replenishment, consumption, and adjustment of the product items being transferred.
Return order	<ul style="list-style-type: none"> • Arrange the fields on page 867. • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – The Product Transfers related list shows product transfers related to the return – The Return Order Line Items related list shows subdivisions of the return, each associated with a specific product – The Work Orders related list shows work orders related to the return – The Work Order Line Items related list shows work order line items related to the return
Return order line item	<ul style="list-style-type: none"> • Arrange the fields on page 867. • Confirm that your layout includes the following related lists: <ul style="list-style-type: none"> – The Product Transfers related list shows product transfers related to the return

Page Layout	Recommended Customizations for Inventory Management
	<ul style="list-style-type: none"> - The Work Orders related list shows work orders related to the return - The Work Order Line Items related list shows work order line items related to the return
Shipment	<ul style="list-style-type: none"> • Arrange the fields. The default layout includes only some of the available fields. • Optionally, customize the Status field values. The default values are Shipped and Delivered. • Confirm that your layout includes the Product Transfers related list, which shows transfers that the shipment fulfills.
Work order Work order line item	<p>Confirm that your layouts include the following related lists.</p> <ul style="list-style-type: none"> • The Products Required related list shows products needed to complete the work. • The Products Consumed related list shows product items used to complete the work. • The Product Requests related list shows product requests created to ensure that the assigned service resources have the parts they need to complete the work. • The Product Request Line Items related list shows product request line items associated with the work. • The Return Orders related list shows return orders associated with the work. • The Return Order Line Items related list shows return order line items associated with the work.

3. Make the following tabs visible to your users:

- Products
- Product Items
- Product Requests
- Product Request Line Items
- Product Transfers
- Return Orders
- Shipments

You can add the tabs to a custom app or instruct users to add them in Salesforce.

4. Configure the Field Service Lightning mobile app for inventory management.

SEE ALSO:

[Configure Field Service Location Settings](#)

[Parts and Inventory Fields](#)

Create Parts

After you customize your field service inventory settings, track where your inventory is stored by creating product items.

 **Note:** Field Service Lightning must be enabled in your org.

Product items represent your inventory. Each product item is linked to a storage location, such as a van or warehouse, and to a specific product, indicating the item being stored. Create product items so you can track inventory usage and restock when necessary.

Before you get started, choose whether to assign serial numbers to product items for identification purposes.

- If you assign a serial number, each product item represents a single item in your inventory: for example, create one product item representing a motor with serial number 012345 stored at Warehouse A.
- If you choose not to assign serial numbers, you can specify a quantity on each product item. Create one product item for every location that has the product in stock. For example, create:
 - One product item representing 100 batteries stored at Warehouse A
 - One product item representing 15 batteries stored in Service Van 1

Product item quantities auto-update to reflect transfers between locations.

 **Warning:** If you plan to specify serial numbers on product items, consider these limitations:

- The location on serialized product items can't be updated after creation, either through a product transfer or a manual update of the product item record.
- Technicians using the Field Service Lightning mobile app can consume—via the Products Consumed related list—only one serialized product item looking up to the same product per work order. This limitation is on mobile only.

1. From the Product Items tab, click **New**.
2. Use the lookup field to select a product.

 **Tip:** To add products to your org, see [Guidelines for Creating Products](#).

3. Use the lookup field to select the location where the product item is stored. Only locations that have the **Inventory Location** option selected can be associated with product items.
4. Enter the Quantity on Hand, which is the amount at this location. If you intend to add a serial number, this value must be 1.
5. If needed, add a unit of measure; for example, grams, packs, or units. These values are inherited from the Quantity Unit of Measure field on products.
6. If the Quantity on Hand is 1, enter a serial number.
7. Click **Save**.

The product item now appears in the Product Items related list on the associated location and product records. In addition, the Product Item Transactions related list on the product item now contains a “Replenished” transaction that tells you when the product item was created.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create product items:

- Create on product items

To view product item transactions:

- Read on product items

To create, update, or delete product item transactions:

- Edit on product items

If you update a product item, a new product item transaction is created with a type of “Adjusted” and a quantity that is the difference between the old and new Quantity On Hand. Deleting a product item deletes all related product item transactions.

SEE ALSO:

[Parts and Inventory Fields](#)

[Common Tasks in Inventory Management](#)

Track Required Parts

If a work order needs to be completed by a carpenter with a hand saw, don't assign it to an electrician with a voltmeter! Add required products to work types, work orders, and work order line items to ensure that the assigned service resource arrives with the right equipment.

Adding required products to work types saves you time and keeps your business processes consistent. Work orders and work order line items inherit their work type's required products. For example, if all light bulb replacement jobs require a ladder and a light bulb, add the ladder and light bulb as required products to your Light Bulb Replacement work type. When it's time to create a work order for a customer's light bulb replacement, applying that work type to the work order adds the required products.

To add a required product to a work order, work order line item, or work type:

1. Navigate to the record that needs required products.
2. In the Products Required related list, click **New**.
3. Use the lookup field to select a product.
4. Enter the quantity required.
5. Select a quantity unit of measure.
6. Click **Save**.

SEE ALSO:

[Add Required Skills to Work Orders or Work Types](#)

[Parts and Inventory Fields](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To view products required:

- Read on the parent object (work orders or work types) AND Read on products

To create, update, or delete products required on work orders or work order line items:

- Edit on work orders AND Read on products

To create, update, or delete products required on work types:

- Edit on work types AND Read on products

Track Consumed Parts

Create products consumed to track the use or consumption of items from your inventory.

When a part leaves your inventory because it was used during a field service appointment, create a *product consumed* record so your inventory numbers are adjusted accordingly. You can add products consumed to work orders or work order line items. Track product consumption at the line item level if you want to know which products were used for each line item's tasks.

 **Note:** Field Service Lightning must be enabled in your org.

1. In the Products Consumed related list on a work order or work order line item, click **New**.
2. If applicable, enter a work order line item. The work order is auto-populated.
3. In the Product Item field, select the product item where the part originated. For example, if 10 bolts that were stored in Warehouse B were used to complete the work order, select the product item that represents all bolts stored in Warehouse B.
4. Enter the quantity consumed.
5. To link the consumed product to a price book entry, select a price book entry and enter the unit price.
6. Add context in the Description field.
7. Save your changes.

 **Tip:** After a product item is consumed, track it as an asset (an installed or purchased product) and add product details like a serial number.

SEE ALSO:

[How Product Consumption Works](#)
[Parts and Inventory Fields](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view products consumed:

- Read on work orders

To create or delete products consumed:

- Edit on work orders AND Read on product items

To update products consumed:

- Edit on work orders

Request Parts

When your stock gets low or you need a part for a particular work order, create a product request. Product requests can be associated with work orders, work order line items, cases, and accounts. You can specify when and where the parts are needed, and divide the request into line items that each represent a needed part.

 **Note:** Field Service Lightning must be enabled in your org.

Technicians or mobile workers can make requests when they find defective parts in their vehicles or their stock has run out. Dispatchers or service managers can create product requests on behalf of their technicians if they see their stock getting low. And schedulers can create product requests when they schedule work orders that require parts which aren't normally found in a technician's vehicle stock.

1. From the Product Requests tab or the Product Requests related list on a work order or work order line item, click **New**.
2. If the request is being made for a particular job, select the related work order or work order line item.
3. Optionally, select the related account or case.
4. Enter the destination location, which is where the parts are needed.

 **Tip:** Service vehicles can also be locations. Mobile locations like vehicles have **Mobile Location** selected on their detail page.

5. Enter the address where the parts should be shipped; for example, the mailing address of the warehouse that is requesting them.
6. Select a shipment speed, and enter the Need By Date.
7. If the parts are being transferred from another location such as a warehouse, enter the source location.
8. Add a description.
9. Assign the product request a status:
 - Draft: Finalizing the product request details.
 - Submitted: The product request is ready for processing.
 - Received: The department in charge of fulfilling the request is working on it.
10. Save your changes.
11. Create one product request line item for each product needed.
 - a. From the Product Request Line Items related list, click **New**.
 - b. Select the product that is needed, and enter a quantity and unit of measure. These values are inherited from the Quantity Unit of Measure field on products.
 - c. Fill in the rest of the fields as needed. The parent product request's shipping and related record information is auto-populated on its line items.
 - d. Save your changes.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create product requests:

- Create on product requests

To view product request line items:

- Read on product requests

To create, update, or delete product request line items:

- Edit on product requests

The product request now appears in the Product Requests related list on the related work order or work order line item. You can also view and sort line items from all product requests from the Product Request Line Items tab in Salesforce.

SEE ALSO:

[Part Request and Transfer Fields](#)

Transfer Parts

To fulfill a product request, create a product transfer. Product transfers track the movement of parts from one field service location to another. When you track product transfers in Salesforce, the inventory numbers at your various storage locations update automatically to reflect the transfers.

Note:

- You can't create product transfers for product items with serial numbers.
- Field Service Lightning must be enabled in your org.

Create one product transfer for each product request line item. This way, you can track the status of each part being requested. The Product Transfers related list on a product request shows all product transfers associated with the request's line items. In addition, product request line items have their own Product Transfers related list that shows related transfers.

While product transfers are typically created in response to a product request, they don't have to be. For example, when a new technician joins your team, you can create a series of product transfers to track the initial stocking of their service vehicle.



Tip: When creating a transfer, set the status of the related product request line item to Received to indicate that the request is being processed.

- From the Product Transfers tab or the Product Transfers related list on a product request, product request line item, or shipment, click **New**.
- Enter a source product item or product.
 - If the parts are being transferred from a location within your inventory, such as a warehouse, enter a source product item. The source product item shows where the parts are being transferred from, and updates the quantity at the source location. For example, if you need five hammers to be transferred from Warehouse A to Warehouse B, select the product item record that tracks the hammers stored at Warehouse A.
 - If the products are being transferred from outside your inventory—for example, if they're being ordered from a manufacturer—enter a product name.
- Enter the quantity being transferred and the Quantity Unit of Measure. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
- If it's not already populated, enter the related product request line item.
- Use the lookup field to select the shipment on which the product items are being transferred.
- Enter the destination location, and if applicable, the source location.
- Enter the expected pickup date.
- Add a description.
- After the transferred parts are received, select Received and update the following fields:
 - Received By

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create product transfers for field service:

- Create on product transfers

To mark product transfers received:

- Edit on product items

- Quantity Received
- Status

Once you mark a product transfer received, you can't undo it.

10. Save your changes.

When a product transfer is marked received, Salesforce creates or updates several related records to ensure that your inventory numbers stay accurate. To learn more, see [How Product Transfers Work](#).

SEE ALSO:

[Part Request and Transfer Fields](#)

Create Shipments

To track product items while they're in transit between locations, create shipments. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date.

You can link shipments to product transfers so your team always knows the status of part transfers. While shipments are an optional part of inventory management, they make it easier to stay informed about the coming and going of parts in your inventory.

1. From the Shipments tab, click **New**.
2. In the General Information section, add details about the shipment's origin and destination. If applicable, select the field service locations where the shipment departs or arrives.
3. In the Tracking Information section, add details about the shipping provider and delivery date.
4. Add a description explaining what is being shipped.
5. Save your changes.
6. From the Product Transfers related list, create product transfers to track the movement of product items that were included in the shipment.

SEE ALSO:

[Part Request and Transfer Fields](#)

[How Product Transfers Work](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create shipments:

- Create on shipments

Create Return Orders

Create return orders to facilitate the return and repair of items that were sold to customers or supplied to field service technicians.

1. From the Return Orders tab or the Return Orders related list on a record, click **New**.
2. Enter an account and contact associated with the return order.
3. Enter an associated product request. For example, if a technician is returning an unused item, select the related product request that the product was intended to fulfill.
4. In the Returned By field, select the user returning the items.
5. Enter a source and destination location, if applicable. For example, if the return order tracks the return of products from a customer's facility to your main warehouse, select the warehouse as your destination location.
6. Enter a shipment type, address, and the date the returned products are expected to arrive at the destination location. The Ship From Address represents the location of the items at the start of the return or repair. For example, if a customer is returning an item, enter the customer's address.
7. Add notes or context about the return in the Description field.
8. Save your changes.
9. In the Return Order Line Items related list, add a line item for each product being returned.
 - a. Click **New**.
 - b. To represent the items being returned, fill out one of more of the following fields: Asset, Order Product, Product, Product Item, and Product Request Line Item.



Tip: If you enter a product item, select the product item associated with the source location of the returned items.

- c. Enter a quantity and unit of measure. If a product or product item is selected, the unit of measure is autopopulated.
- d. Select a reason for the return.
- e. In the Processing Plan field, indicate what should happen to the returned item.
- f. In the Repayment Method field, indicate how the owner should be reimbursed for the return. If the return order is tracking the return of items from van stock to an inventory location, you'll probably leave this field blank.
- g. If needed, update the source and destination location. These are inherited from the return order, but can be updated.
- h. Add notes or context about the returned items in the Description field.
- i. Save your changes.

SEE ALSO:

[Guidelines for Creating Return Orders](#)

[Return Order Fields](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create return orders:

- Create on return orders

To view return order line items:

- Read on return orders

To create, update, or delete return order line items:

- Edit on return orders

Set Up Service Reports

Make your customers happy with fast field service reports delivered to their inboxes. Your technicians and dispatchers can create reports for work orders, work order line items, and service appointments and email them directly to the customer. You can use standard templates or create variations of your own.

IN THIS SECTION:

1. [Create Service Report Templates](#)
A service report is a PDF that summarizes a work order or service appointment and can be signed by customers and your team members. To control what shows up in your service reports, create service report templates.
2. [Create Service Reports](#)
Create service reports that provide your customers with summaries of their work orders, work order line items, and service appointments.

Create Service Report Templates

A service report is a PDF that summarizes a work order or service appointment and can be signed by customers and your team members. To control what shows up in your service reports, create service report templates.

 **Note:** Field Service Lightning must be enabled.

Users generate a service report for a record by clicking **Create Service Report** on the record. Multiple service reports can be created for a record, and these appear in its Service Report related list. If you assign a specific template to a work order, work order line item, or work type using the Service Report Template lookup field, the record's service reports always use the associated template. If a record doesn't list a service report template, users are prompted to select from a list of active templates when they try to create a service report.

1. If you want your team to collect signatures on service reports using the Field Service Lightning mobile app, create picklist values for the Signature Type field on digital signatures. Signature types represent the role of the person signing a report.
 - a. Navigate to the Setup page.
 - In Salesforce Classic, from Setup, enter *Digital Signatures* in the Quick Find box, then select **Fields** under Digital Signatures.
 - In Lightning Experience, go to Digital Signature in the Object Manager, then click **Fields and Relationships**.
 - b. Click **Signature Type**.
 - c. From the Signature Type Picklist Values related list, add up to 1,000 values to the picklist. For tips on creating signature types, see [Guidelines for Using Signatures on Service Reports](#).
2. Add the **Create Service Report** button to page layouts for the following objects:
 - Work orders
 - Work order line items
 - Service appointments

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

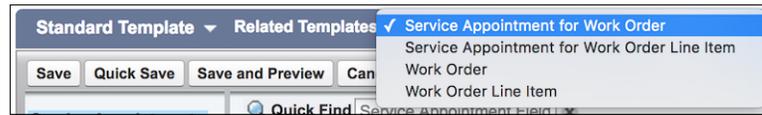
To edit page layouts and picklist values:

- Customize Application

To create service report templates:

- View Setup and Configuration

3. Create a service report template.
 - a. From Setup, enter *Service Report* in the Quick Find box, then click **Service Report Templates** under Field Service.
 - b. Click **New**, or click **Edit** next to a report template you'd like to adjust. You already have one active template named Standard.
 - c. If you are creating a template, select an existing template as its base and give it a name.
 - d. In the Related Templates dropdown menu at the top of the template editor, select a sub-template.



Each template comes with four sub-templates, which allow it to be used for service reports on multiple types of records:

- Service Appointment for Work Order
- Service Appointment for Work Order Line Item
- Work Order
- Work Order Line Item

The Related Templates field shows the sub-template that you're currently editing. We recommend customizing all four sub-templates for each template so you're confident that your service reports contain the right information. Save your changes after you modify each sub-template.

- e. Drag fields, sections, and related lists onto your layout.
- f. Click **Save**.
 -  **Note:** When you preview the report template, it shows the System Administrator profile view. The data shown is simulated, except for images and rich text. If the person creating the service report doesn't have Read permission on certain objects or fields in the service report template, those fields don't appear on the report they create.
- g. (Recommended) Select a new sub-template in the Related Templates field, and customize its layout. Repeat until you've reviewed the layout of all four sub-templates.
- h. Click **Activate** next to the template name on the Service Report Templates home page.

SEE ALSO:

- [Create Service Reports in the Field Service Lightning Mobile App](#)
- [Guidelines for Customizing Service Report Templates](#)
- [Field Service Lightning Limits and Limitations](#)

Create Service Reports

Create service reports that provide your customers with summaries of their work orders, work order line items, and service appointments.

 **Note:** Field Service Lightning must be enabled in your org.

1. From a work order, work order line item, or service appointment, click **Create Service Report** in the action dropdown menu.

 **Tip:** If you don't see this action, ask your Salesforce admin to add it to the page layout. Service reports can't be created for service appointments whose parent record is an account, asset, or opportunity.

2. Use the lookup to find the template you'd like to use.
3. Click **Create PDF**.
The service report preview displays.
4. To save the service report to the record, click **Create Service Report**. To save the report to the record and send a copy to the customer, click **Create and Send Service Report**. Then, fill out the email fields and click **Send**.

The service report is saved in the Service Reports related list on the record.

 **Note:** If you don't have Read permission on an object or field in the service report template, it doesn't appear in the service report you create.

SEE ALSO:

[Service Report Fields](#)

[Create Service Reports in the Field Service Lightning Mobile App](#)

[Guidelines for Using Signatures on Service Reports](#)

[Guidelines for Customizing Service Report Templates](#)

[Field Service Lightning Limits and Limitations](#)

Set Up Field Service in Communities

Keep customers, partners, and contractors in the loop about field service work. All field service objects can be added to Lightning communities and communities built using the Salesforce Tabs + Visualforce template. Exposing these objects and related objects like assets, accounts, and contacts make it easy for customers to schedule appointments or check field service records straight from their community.

If you use a community to connect with your business partners, employees, or customers, keeping the communication lines open is key to your field service success. For example, you can add work orders and service appointments to a partner community to stay in sync with contractors, or add return orders and return order line items to a community to coordinate customer returns.

1. To set up field service objects in a Lightning community:
 - a. Create a new object page in Page Manager in Community Builder.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create service reports:

- Edit on the parent object (work orders, work order line items, or service appointments)

To email a service report:

- Edit on the parent object AND Send Email

EDITIONS

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

USER PERMISSIONS

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

- b. When prompted to choose a Salesforce object, choose a field service object. Page Manager automatically creates three related pages for the new object page: a record detail page, a record list page, and a related list page.
 - c. To expose the field in your Customer Service community, add it to the Navigation Menu in the Page Editor.
2. To set up field service objects in a community built using the Salesforce Tabs + Visualforce template, simply add the objects as tabs. For details, see [Add Tabs to Your Community](#).

 **Note:** Linked articles, which are knowledge articles attached to supported field service objects, are not supported in Lightning communities.

SEE ALSO:

[Set Up and Manage Salesforce Communities](#)

[Objects Supported by Out-of-the-Box Components and Pages in Community Templates](#)

[Field Service Lightning Objects](#)

[Guidelines for Setting Up Field Service Contractors](#)

Report on Field Service Lightning

Create report types to track field service activity in your org. To take your reporting a step further, use the Field Service Analytics App.

You can create a variety of custom report types to stay informed about field service records.

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types** and click **New Custom Report Type**.
2. In the Primary Object dropdown menu, select the field service object you want to report on:

 **Note:** This table doesn't include feed objects that are available as secondary objects.

Primary Object	Description	Available Secondary Objects
Accounts	View accounts' maintenance plans, product requests, return orders, resource preferences, and work orders.	<i>Field service objects:</i> Maintenance Plans Product Requests Product Request Line Items Resource Preferences Return Orders Work Orders
Assets	View assets' maintenance plans, replacements, and work orders.	<i>Field service objects:</i> Asset Relationships Maintenance Assets Work Orders

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

Primary Object	Description	Available Secondary Objects
Cases	View cases' work orders, return orders, and product requests.	<i>Field service objects:</i> Product Requests Product Request Line Items Return Orders Work Orders
Contacts	View contacts' maintenance plans, service appointments, return orders, and work orders.	<i>Field service objects:</i> Maintenance Plans Return Orders Service Appointments Work Orders
Locations	View locations' maintenance plans, parts, part transfers, and more.	Addresses Assets Maintenance Plans Product Items Product Requests (Source Location) Product Requests (Destination Location) Product Request Line Items (Source Location) Product Request Line Items (Destination Location) Product Transfers (Source Location) Product Transfers (Destination Location) Service Resources Service Territory Locations Shipments (Source Location) Shipments (Destination Location) Return Orders (Source Location) Return Orders (Destination Location) Work Orders Work Order Line Items
Maintenance Plans	View maintenance plans' work orders and assets.	Maintenance Assets Work Orders
Operating Hours	View the operating hours of service territories and their members.	Service Territories Time Slots

Primary Object	Description	Available Secondary Objects
Orders	View an order's associated return orders.	<i>Field service objects:</i> Return Orders
Product Items	View the transfer, consumption, and replenishment of parts in your inventory.	Product Transfers Products Consumed Product Item Transactions
Product Request Line Items	View the transfers related to parts in your inventory.	Product Transfers
Product Requests	View the line items and return orders associated with product requests.	Product Request Line Items Return Orders
Products	View product requirements, transfers, requests, return order line items, and parts.	<i>Field service objects:</i> Assets Product Items Products Required Product Request Line Items Product Transfers Return Order Line Items
Product Transfers	View product quantity, origin and destination locations, and owner of product transfers.	None
Return Orders	View return orders' line items.	Return Order Line Items
Service Appointments	Compare the differences between scheduled and actual appointment times, and analyze trends in resource assignment on appointments.	Assigned Resources
Service Contracts	View service contracts' maintenance plans and work orders.	<i>Field service objects:</i> Maintenance Plans Work Orders
Service Crews	View appointments that crews are assigned to and information about crew members.	Assigned Resources Service Crew Members
Service Resources	Compare service resources' capacities, absences, and skills, and view the territories they belong to and service appointments and crews they are assigned to. And, see which accounts or work orders list resources as preferred.	Assigned Resources Resource Absences Resource Capacities Resource Preferences

Primary Object	Description	Available Secondary Objects
		Service Crew Members Service Resource Skills Service Territory Members Time Sheets
Service Territories	Compare the number and types of service appointments, work orders, and work order line items across service territories, and view the service resources that belong to each territory.	Service Appointments Service Territory Members Service Territory Locations Work Orders Work Order Line Items
Shipments	View shipment address and transfer information.	Product Transfers
Time Sheets	View time sheets' owners, entries, and duration.	Time Sheet Entries
Users	View field service records created by, modified by, or associated with users.	<i>Field service objects:</i> Assets (Asset Owner, Created By, Last Modified By) Locations (Created By, Last Modified By) Maintenance Plans (Created By, Last Modified By) Operating Hours (Created By, Last Modified By) Product Items (Created By, Last Modified By) Product Requests (Created By, Last Modified By) Product Request Line Items (Created By, Last Modified By) Product Transfers (Created By, Last Modified By) Return Orders (Created By, Last Modified By, Returned By) Service Appointments (Created By, Last Modified By) Service Crews (Created By, Last Modified By) Service Resources (User, Created By, Last Modified By)

Primary Object	Description	Available Secondary Objects
		Service Territories (Created By, Last Modified By) Shipments (Created By, Last Modified By) Time Sheets (Created By, Last Modified By) Work Orders (Owner, Created By, Last Modified By) Work Types (Created By, Last Modified By)
Work Orders	Compare information such as the number of appointments or line items per work order, or work order service territories. And, analyze how resource preferences and skill requirements vary between work orders.	Object Milestones Products Consumed Product Requests Products Required Product Request Line Items Resource Preferences Service Appointments Skill Requirements Time Sheet Entries Work Order Line Items Work Order Line Items
Work Types	Compare information such as work type duration and skill requirements.	Maintenance Plans Products Required Skill Requirements

- Complete the required fields and click **Next**.

 **Tip:** In the `Store in Category` dropdown menu, we recommend choosing **Customer Support Reports** or **Other Reports**. This is the category where users find the custom report type on the Reports tab. You can also create your own field service report folder. Make your choices on the Define Report Records Set page.

- Click **Save**.
- As needed, remove and rearrange fields from your report layout.

Salesforce also offers the Field Service Analytics App, which is bundled with the Service Analytics App. To learn more, see [The Field Service Analytics App](#).

 **Tip:** To view work orders with milestones in your org, use the Object Milestones custom report type. The Milestone Status and Milestone Status Icon fields are not available in work order reports.

Set Up Self-Service Appointment Booking for Field Service Lightning (Beta)

Snap-ins Appointment Management (beta) gives your customers an easy way to schedule, modify, and cancel appointments with your mobile workforce. The experience is powered by Visual Workflow, which means you can craft the perfect interaction and decide when and how to create related records like work orders.

 **Note:** As a beta feature, Snap-ins Appointment Management is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

 **Important:** You must have Field Service Lightning enabled and the latest version of the [Field Service Lightning Managed Package](#) installed and working in your org.

1. Update your Field Service Lightning permission sets.
 - a. In the Field Service Admin app, on the Field Service Settings tab, Click **Permission Sets**.
 - b. Ensure the Self Service permission set is up to date.

If you don't have Self Service permission set on in the Field Service Lightning managed package, you don't have the latest version of the package.
2. Enable Snap-ins Appointment Booking.
3. Change the Service Territory field on the account object.
 - a. From Setup, click **Object Manager**.
 - b. Enter *Account* in the Quick Find box, then select **Account**.
 - c. Click **Field & Relationships**.
 - d. Scroll down and click **Service Territory**.
 - e. Click **Edit**.
 - f. Change the `Field Name` value from `Service_Territory` to `Default_Service_Territory`.
 - g. Change the `Child Relationship` value from `Accounts` to `Default_Accounts`.
 - h. Click **Save**.
4. Install the FSL Scheduling Flows package.
 - a. In the same browser session, go to the URL:
`https://login.salesforce.com/package/installPackage.apexp?p0=04tB0000000JPmb`.
 - b. Click **Install FSL Snap-In Flows"/"Summer 2018"/"1.4**.
 - c. For what if existing component names conflict with ones in this package? select **Do not install**.
 - d. Select **Install for all users**.
 - e. Click **Install**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To configure the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

- f. In the `Approve Third-Party Access` dialog box, select **Yes, grant access to these third-party web sites**, then click **Continue**.
- g. Wait for an email from `support@salesforce.com` confirming that Package FSL Snap-In Flows Install was successful before proceeding.

**Tip:**

- If you receive an error message that the app can't be installed because your org doesn't have permission to create flows, Snap-ins Appointment Booking isn't enabled.
- If you receive an error message that the "Accounts__r" relationship field is already used, ensure you've change the Service Territory field on the account object correctly.

5. Create skeleton Scheduling and Scheduling_CallBack Visualforce pages.

- a. From Setup, enter `Visualforce` in the Quick Find box, then select **Visualforce Pages** and click **New**.
The Visualforce Pages page can take up to a minute to load.
- b. In the `Label` field, enter `Scheduling` and click **Save**.
- c. Click **Clone** on the Visualforce Pages, Scheduling page.
- d. On the Visualforce Page page, in the Label and Name fields, enter `Scheduling_Callback` and click **Save**.

6. Add the Visualforce pages to your community or public website.

- a. From Setup, enter `Communities` in the Quick Find box, then select **All Communities** and click **Workspaces** on your consumer community.
- b. Click the **Administration** panel.
- c. On the left-hand side, click **Pages**.
- d. Click **Go to Force.com**.
- e. In the Custom URLs section, copy and save the domain name.
- f. Click **Edit**.
- g. Scroll through the available Visualforce pages list, select **Schedling** and **Scheduling_Callback**, and move them to the enabled Visualforce pages, and then click **Save**.
- h. To ensure the community opens, click **View**.

7. Create and configure a connected app.

- a. From Setup, enter `App Manager` in the Quick Find box, then select **App Manager** and click **New Connected App**.
- b. On the New Connected App page, in Connected App Name, enter `Snap-ins Appointment Booking`.
- c. Adjust the API Name to `Snapins_Appointment_Booking`.
Remove the dash (-) in Snap-ins.
- d. In `Contact Email`, enter your email address.
- e. Select **Enable OAuth Settings**.
The `Callback URL` field appears.
- f. In the `Callback URL` field, enter:
`https://*COMMUNITY_DOMAIN_NAME_HERE*/consumer/Scheduling_Callback`.

Occasionally, copying and pasting the string creates erroneous characters. Ensure that the value in the `Callback URL` field matches the string exactly before proceeding to the next step.

 **Important:** Do **NOT** click save yet!

- g. In `Callback URL` replace `*COMMUNITY_DOMAIN_NAME_HERE*` with the domain name field value you saved earlier.
- h. Select **Allow access to your unique identifier (openid)** from Available OAuth Scopes and move it to Selected OAuth Scopes.
- i. Now, click **Save**, and then **Continue**.
- j. On the Manage Connected Apps page, copy and save the Consumer Key and the Callback URL.

 **Tip:** To return to the Managed Connected Apps detail page, if you need to get your Consumer Key and/or Callback URL values:

- a. From Setup, go to App Manager (not Manage Connected Apps).
- b. Find your scheduling app. For example, Snap-ins Appointment Booking.
- c. From the row-menu, click the drop down and select **View**.
- d. You can see the Consumer Key and Callback URL fields there.

8. Configure the Snap-in.

- a. From Setup, enter `snap-ins` in the Quick Find box, then select **Snap-ins** and click **New Deployment**.
- b. On the New Snap-in Deployment page, in `Snap-in Deployment Name`, enter `Appointment Booking`
- c. Under `Site Endpoint`, select **Consumer_Community** and click **Create**.
- d. On Snap-in Deployment Settings, click **Start** next to `Field Service settings`.

 **Note:** If you don't have a line for Field Service settings, Snap-ins Appointment Booking isn't enabled.

- e. On the Field Service Settings page, select **Let Customers Schedule New Appointments** and optionally **Let Customers View Their Appointments**, and click **Save**.
- f. In the Scheduling Flows section, click **Edit**
- g. Select the following flows.
 - New Appointment Flow: **ESW_FS_Main_Flow_multi_data** or **FSL_Snap_ins_New_Appointment_Flow** depending upon your package version
 - Modify Appointment Flow: **ESW_FS_Modify_Flow**
 - Cancel Appointment Flow: **FLS_Snap_ins_Cancel_Flow**

 **Note:** If there are no values in Appointment Booking Flow, the FSL Scheduling Flows package failed to install.

- h. To customize the images used in the flow, click **Edit** under Field Service custom branding. You can enter your logo in Logo Image URL.
- i. To go back to the deployment home, click **APPOINTMENT_BOOKING** at the top of the page.
- j. To activate the snap-in, click the slider on Field Service settings.
- k. Click **Get Code** next to Snap-in code snippets.
- l. On the Snap-in Code Snippets page, click **Copy to Clipboard**, save the code snippets for later, and click **Done**.

9. Complete the Scheduling Callback Visualforce page.

- a. From Setup, enter *Visualforce* in the Quick Find box, then select **Visualforce Pages**.
- b. On the Visualforce Pages page, click the letter **S**.
- c. Click **Edit** next to Scheduling Callback.
- d. Copy this entire code block.

```
<apex:page sidebar="false" showHeader="false">
<html>
<head>
  <meta name="salesforce-community"
content="https://COMMUNITY_DOMAIN_NAME/consumer"></meta>
  <meta name="salesforce-client-id" content="CLIENT_ID"></meta>
  <meta name="salesforce-mode" content="popup-callback"></meta>
  <meta name="salesforce-save-access-token" content="true"></meta>
  <meta name="salesforce-allowed-domains"
content="COMMUNITY_DOMAIN_NAME/consumer,*.force.com"></meta>
  <meta name="salesforce-redirect-uri"
content="http://COMMUNITY_DOMAIN_NAME/consumer/Scheduling_Callback"></meta>
  <meta name="salesforce-target" content="#salesforce-login"></meta>
  <!-- <meta name="salesforce-login-handler" content="onLogin"> -->
  <meta name="salesforce-logout-handler" content="onLogout"></meta>
  <script
src="https://COMMUNITY_DOMAIN_NAME/consumer/servlet/servlet.loginwidgetcontroller?type=javascript_widget"
  async='true' defer='true'></script>
</head>
<body></body>
</html>
</apex:page>
```

- e. In Visualforce Markup, select everything from `<apex:page >` through `</apex:page>` and paste the code you copied, replacing it completely.
- f. Replace the 4 instances of **COMMUNITY_DOMAIN_NAME** with the domain name you saved earlier.
- g. Replace the instance of **CLIENT_ID** with the consumer key you saved earlier.
- h. Click **Save**.

10. Complete the Scheduling Visualforce page.

- a. From Setup, enter *Visualforce* in the Quick Find box, then select **Visualforce Pages**.
- b. Click **Edit** next to Scheduling.
- c. In Visualforce Markup, delete everything between, but not including, `<apex:page >` and `</apex:page>`. Leave `<apex:page >` and `</apex:page>`.
- d. Copy the code that you saved for later from the Snap-in Code Snippets page and paste it between `<apex:page >` and `</apex:page>`.

 **Note:** Initially, it may appear that no code was copied. To see the code, scroll left in Visualforce Markup.

- e. Copy this entire code block.

```
<apex:page sidebar="false" showHeader="false">
<html>
```

```

<head>

<style type='text/css'>
#salesforce-login button{
    display:none;
}

#salesforce-login button.fieldServiceStart{
    display:block;
}

#salesforce-login button#sfid-login-button{
    display:block;
}
</style>

```

- f. On your Visualforce page, in Visualforce Markup, highlight `<apex:page >` and paste the code you copied so that it replaces it.
- g. Copy this entire code block.

```

<h1>Scheduler</h1>
</head>

<body>
<div id="salesforce-login">
<button>Schedule Appointment</button>
</div>
</body>

<footer>
</footer>

</html>

</apex:page>

```

- h. On your Visualforce page, in Visualforce Markup, scroll down to the very bottom, highlight `</apex:page >` and paste the code you copied so that it replaces it.

 **Note:** When pasting any code into Visualforce Markup, check for and remove any erroneous characters in code.

- i. Click **Quick Save**.
- j. In the code, replace `true`, on line 17, with `false`.
- k. Insert the Consumer Key you saved earlier between the empty single quotes in the code on row 30.
- l. Insert the Callback URL you saved earlier between the empty single quotes in the code on row 31.
- m. Insert the `#salesforce-login` between the empty single quotes in the code on row 32.
- n. Click **Save**.

11. Create a Cross-Origin Resource Sharing (CORS) record.

- a. From Setup, enter `CORS` in the Quick Find box, then select **CORS** and click **New**.

- b. Enter `http://sdodemo-main*.force.com` in Origin URL Pattern, and click **Save**.

12. Update the hard coded values in the flow.

 **Note:** To get the necessary ID records, use the Chrome browser.

- a. From the App Launcher, click the **Field Service Admin** panel.
- b. On the Operating Hours tab, switch to the **All Operating Hours** list view.
- c. Click an operating hours record.
- d. In your browser's address bar, copy the Operating Hours Record ID and save it.
`https://.../sObject/[Operating Hours Record ID]/view`
- e. On the Scheduling Policies tab, switch to the **All** list view.
- f. Click a scheduling policies record.
- g. In your browser's address bar, copy the Scheduling Policy's Record ID and save it.
`https://.../sObject/[Scheduling Policy's Record ID]/view`
- h. From the App Launcher, under All Items, click Accounts and switch to the **All Accounts** list view.
- i. Click an account record.
- j. In your browser's address bar, copy the Account Record ID and save it.
`https://.../sObject/[Accounts' Record ID]/view`
- k. From Setup, enter `Flows` in the Quick Find box, then select **Flows**.

 **Note:** If you get a Flash error, click **Run Once**, **Install** and/or **Allow**.

- l. On the Flow Designer page, click **Explorer**.
- m. Under Constants, click the pencil icon next to OperatingHoursId.
- n. In the value field, replace what is there with the Operating Hours Record ID you saved earlier and click **OK**.
- o. Again under Constants, click the pencil icon next to PolicyId.
- p. In the value field, replace what is there with the Scheduling Policy's Record ID you saved earlier and click **OK**.
- q. Under Variables, click the pencil icon next to AccountId.
- r. In the default value field, replace what is there with the Account Record ID you saved earlier and click **OK**.
- s. Click **Save As**, and then **OK** and **Close**.
- t. In the flow detail page, click **Activate** next to the version of the flow that you created.

Field Service Lightning Considerations

Before you set up Field Service Lightning, review these important considerations about its features.

IN THIS SECTION:

[Field Service Lightning Limits and Limitations](#)

Learn about the limits and limitations that exist for Field Service Lightning.

[Calculating Address Geolocation in Field Service Lightning](#)

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

[How Pricing Works on Work Orders](#)

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

[Operating Hours Considerations](#)

Learn how operating hours work and how to assign them to people and regions.

[Service Crew Scheduling Considerations](#)

Review important information on how the Field Service Lightning managed package schedules service crews. These considerations apply only if the managed package is installed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning Limits and Limitations

Learn about the limits and limitations that exist for Field Service Lightning.

Limits

Limit	Details
Maximum number of service resources per user	1
Maximum number of service territories in a service territory hierarchy	10,000
Maximum number of work orders in a work order hierarchy	10,000
Maximum number of work order line items in a work order line item hierarchy	10,000
Maximum number of work orders that can be generated simultaneously for a maintenance plan	2,500  Tip: To decrease the number of work orders generated, increase the Frequency value, decrease the Generation Timeframe value, or decrease the number of assets related to the maintenance plan.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Limit	Details
Maximum number of locations in a location hierarchy	10,000
Maximum number of signature blocks on a service report template	20
Maximum number of values in the Signature Type picklist on digital signatures	1,000
Maximum number of child assets per asset	2,000
Maximum number of levels in an asset hierarchy	50
Maximum number of assets in an asset hierarchy	10,000
Maximum size of asset hierarchies that can be viewed in the tree grid view	500

Limitations

Linked Articles

Linked articles are knowledge articles attached to a work order, work order line item, or work type. They include the following limitations.

- Quick actions and global actions aren't supported for linked articles.
- The Article widget and Feed Articles Tool aren't available in the feed view.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce app, linked articles can't be accessed from feed items.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles are available only in Salesforce Classic. A Linked Work Types related list isn't available in any platform.
- The Knowledge One widget isn't available on work types in the console. To manage linked articles on work types in the console, use the Articles related list.
- Linked articles are read-only in the Salesforce app.

Service Appointments

- The Parent Record field on service appointments isn't available in custom report types.
- The Parent Record field on service appointments can't be referenced in formulas, validation rules, workflow rules, or process flows. If you want to limit the available types of service appointment parent records, use an Apex trigger.
- Service appointment fields whose values are inherited from the parent record can't be referenced in formulas, validation rules, workflow rules, or process flows. The standard inherited fields are Work Type, Account, Parent Record Type, and Parent Record Status Category.

Service Reports

- You can't write triggers for service reports.
- Service reports can't be created on service appointments whose parent records are assets, accounts, or opportunities.
- The **Create Service Report** action isn't available in the Salesforce app.
- Section titles and rich text fields in service reports can't be translated.
- Digital signature field labels can't be customized.
- Related list filtering on service reports has the following limitations:
 - The Status field on contract line items isn't available for filtering

- The Filters tab isn't available in Internet Explorer 8

Service Resources

- The User field on service resources isn't editable in Lightning Experience. To update the user on a service resource, switch to Salesforce Classic.

Skills

- Skills can be created only in Salesforce Classic. However, they can be assigned to service resources or added as required skills in both Salesforce Classic and Lightning Experience.

Inventory Management

- Technicians using the Field Service Lightning mobile app can consume—via the Products Consumed related list—only one serialized product item per product per work order. For example, you may have multiple product items that are assigned serial numbers and that are all associated with your Inverter product. A mobile app user can add only one of them as a product consumed on a specific work order. This limitation doesn't apply to non-mobile platforms.
- The location on serialized product items can't be updated after creation, either through a product transfer or manual update of the product item record.

The Salesforce App

Most Field Service Lightning standard features and managed package are available in all versions of the Salesforce app. They include the following limitations:

- In Salesforce for iOS:
 - You can't create service appointments, and the Recent related list isn't available.
 - You can't create service resources or absences, and the Recent related list isn't available on service resources or absences.
- The dispatcher console, which is part of the managed package, isn't available in the Salesforce app.
- When working offline without the offline sync permission enabled, creating or updating records could result in an error if the Created Date or Last Modified Date fields appear to occur in the future.

SEE ALSO:

[Field Service Lightning Mobile App Limitations](#)

[Optimization Limits and Considerations](#)

Calculating Address Geolocation in Field Service Lightning

When you add a street address to certain types of field service records, Salesforce calculates the address's latitude, longitude, and location accuracy. You can reference this data, which is visible only in the API, in any custom field service applications.

This geolocation data feature, known as “geocoding”, is enabled for all supported field service objects when you enable Field Service Lightning. The API contains values for the following three fields on work orders, work order line items, service appointments, service territories, resource absences, and service territory members:

Field Name	Description
Latitude	The latitude of the street address.
Longitude	The longitude of the street address.
GeocodeAccuracy	<p>The accuracy of the latitude and longitude. This field contains one of the following values, listed in order from most to least accurate:</p> <ul style="list-style-type: none"> • Address—In the same building • NearAddress—Near the address • Block—Midway point of the block • Street—Midway point of the street • ExtendedZip—Center of the extended ZIP code area • Zip—Center of the ZIP code area • Neighborhood—Center of the neighborhood • City—Center of the city • County—Center of the county • State—Center of the state • Unknown—No match for the address was found (for instance, the address is invalid)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Keeping Geocoding Data Current

Salesforce periodically refreshes these three geocoding fields to keep them accurate. The refreshes are managed by a feature known as data integration rules. A record's geocoding fields are refreshed when:

- The record is created or updated
- The record type's data integration rule is deactivated and reactivated

Allow some time for the geocoding fields to refresh. The amount of processing time varies based on how many records are being updated at once.

 **Note:** If bulk geocoding is turned off for a data integration rule, deactivating or reactivating the rule does not refresh the geocoding fields. Bulk geocoding is enabled by default.

You can keep an eye on the status of a record's geocoding data in several ways.

- **In Salesforce Classic:** Add the Data Integration Rules related list to the detail page layout of the records you'd like to track. The related list includes:
 - The time the record's geocoding data was last refreshed.
 - The record's geocoding status. To learn what each status means, see [Statuses for Data Integration](#). A status of In Sync means that your geocoding data is current.
 - An **Update** link which lets you manually run an instant refresh.
- **In Lightning Experience:** On the record, select **Check Integration Status** in the action dropdown menu to view its geocoding status.

Turning Off GPS Tracking for Individual Users

If your org has tracking turned on at the org level but a few technicians need it off, add the Exclude Technician from Geolocation Tracking permission on their user profile.

If you're using the Field Service Lightning managed package, opting out of geocoding means that latitude, longitude, and geocode accuracy are no longer calculated for field service records. Without this geocoding data, the scheduling optimizer doesn't function properly.

Opting Out of Geocoding

If you're already using another geocoding service, you can opt out of Field Service Lightning geocoding.

1. From Setup, enter *Data Integration* in the Quick Find box, then select **Data Integration Rules**.
2. Find the entries for Field Service Lightning and click **Deactivate** next to each rule:
 - Geocodes for Work Order Address
 - Geocodes for Work Order Line Item Address
 - Geocodes for Service Appointment Address
 - Geocodes for Service Territory Address
 - Geocodes for Service Territory Member Address
 - Geocodes for Resource Absence Address

SEE ALSO:

[Track Service Resource Geolocation with the Field Service Lightning Mobile App](#)

How Pricing Works on Work Orders

Work orders and work order line items have several price-related fields. Find out how they interact and how to use them.

If you've set up a product catalog in Salesforce to track the goods and services your business offers, you can associate items in your price books with work orders and their line items, similar to the way you can associate products with opportunities or orders. If you specify a price book on a work order, this allows you to link each work order line item to a price book entry (product) from the price book.

For example, if you create a work order for a solar panel installation, select a price book in the Price Book lookup field on the work order. Then, use the Price Book Entry lookup field on its work order line items to select goods or services listed in your price book, such as Site Assessment, Solar Panel, and Inverter. A quick glance at a completed work order's line items shows you which products from your product catalog were sold as part of the work order.

Work orders contain the following price-related fields.

Work Order Field	Description
Discount	(Read only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Subtotal	(Read only) The total of the work order line items before discounts and taxes are applied.
Total Price	(Read only) The total of the work order line items' price after discounts but before tax is added.
Grand Total	(Read only) The total price of the work order with tax added.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you link each work order line item to a product included in the price book.
Tax	The total tax on the work order in a currency format. (Do not enter a percentage.) For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.

Work order line items contain these price-related fields. If you intend to use these fields, add them to work order line item page layouts.

Work Order Line Item Field	Description
Discount	The percent discount to be applied to the line item's subtotal. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Subtotal	(Read only) The line item's unit price multiplied by the quantity.
Total Price	(Read only) The line item's subtotal with discounts applied. This field is blank until you add a unit price and save the line item.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Work Order Line Item Field	Description
List Price	<p>(Read only) The price of the line item (product) as listed in its corresponding price book entry. If a product isn't selected, the list price defaults to zero.</p> <p> Note: When you select a product to link to the line item, you can see the product's list price next to its name and ID in the lookup window. The list price field populates when you save the line item.</p>
Product	<p>The name of the product associated with the line item. The lookup only lists products that are included in the parent work order's price book. When you select a product and save the line item, the following fields are populated on the line item:</p> <ul style="list-style-type: none"> • List Price • Unit Price • Subtotal • Total Price <p> Note: Inline editing isn't supported on the Product field. To change the product on a line item, click Edit. Adding a product updates the list price, unit price, subtotal, and total price based on the related entry in the work order's price book.</p>
Unit Price	<p>By default, the unit price for a work order line item is the line item's list price from the price book, but you can change it.</p>

Considerations

- To apply a discount to a work order, apply the discount at the line item level. If your work order doesn't have line items, its discount is zero.
- When filling out price fields on a work order, just fill out the Price Book and Tax fields. The Discount, Subtotal, Total Price, and Grand Total fields are all automatically calculated based on line item fields.
- When filling out price fields on a work order line item, just fill out the Product and Discount fields. The Subtotal, Total Price, List Price, and Unit Price fields are all automatically calculated based on other line item fields.
- Work order line items don't have to be linked to a product. For example, you might prefer to use work order line items to track tasks. Just keep in mind that if the Product field is blank, you can't use the List Price, Unit Price, Discount, Quantity, Subtotal, or Total Price fields.
- You can't delete a price book that's linked to a work order.
- You can't delete a product that's linked to a work order line item.
- You can't delete a price book entry that's linked to a work order line item. Price book entries are linked to work order line items via the Product lookup field.
- You can't remove a price book from a work order if its line items are linked to products from that price book.

SEE ALSO:

[Set Up Work Orders](#)

[Work Order Fields](#)

Operating Hours Considerations

Learn how operating hours work and how to assign them to people and regions.

Creating Operating Hours

To assign operating hours to a service territory, service territory member, or account, you must first create the operating hours from the Operating Hours tab. By default, only System Administrators can view, create, and assign operating hours.

Assigning Operating Hours to Accounts

Assign operating hours to an account using the Operating Hours field on the account detail page. An account's operating hours represent the times during which its service appointments should be scheduled. For example, if ABC Labs only allows technicians to visit their office Monday through Friday from 8 AM to noon, create operating hours for them that reflect this preference.

If the Field Service Lightning managed package is installed in your org, the default operating hours used when booking an appointment for an account are set elsewhere. From the Field Service Settings managed package tab, click **Global Actions**, then select **Appointment Booking** and update the operating hours.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Assigning Operating Hours to Service Resources

A service resource's operating hours can vary depending on which service territory they're working in, so they have unique operating hours for each territory they belong to. To view a service resource's operating hours for a particular territory, navigate to their Service Territories related list and click the Member Number for the territory. This takes you to the service territory member detail page, which lists the member's operating hours and territory membership dates.

Service territory members automatically use their service territory's operating hours. If a resource needs different operating hours than their territory, create separate operating hours for them from the Operating Hours tab. Then, select the desired hours in the Operating Hours lookup field on the service territory member detail page.

 **Tip:** You can navigate to a service territory member record in two ways:

- From the service resource detail page, find the Service Territories related list, then click the Member Number for the territory.
- From a service territory detail page, find the Service Territory Members related list, then click the Member Number for the territory member whose hours you want to modify.

Enforcing Operating Hours

- If you're using the Field Service Lightning managed package, the scheduling optimizer only assigns service resources to service appointments that fall within the operating hours listed on the resource's territory member record. If you're not using the managed package, operating hours serve as a suggestion rather than a rule.
- You can create Apex triggers that limit time slot settings in your org. For example, you may want to restrict the start and end times on time slots to half-hour increments, or to prohibit end times later than 8 PM.

 **Example:** Henry is an electrician who mostly works in the San Francisco Bay Area, but is occasionally assigned to appointments in Sacramento. His primary service territory is San Francisco Bay Area, and his secondary service territory is Sacramento.

Henry's operating hours in the San Francisco Bay Area are 8 AM to 5 PM, Monday through Friday. However, because Henry needs extra time to travel to and from Sacramento and wants to avoid Friday traffic, his operating hours in that territory are 10 AM to 3 PM, Monday through Thursday. Both service territories use the same operating hours: 6 AM to 6 PM, Monday through Friday.

To reflect these hours in Salesforce, his Salesforce admin does the following:

1. Create three sets of operating hours from the Operating Hours tab, adding time slots for each day:
 - *6 AM to 6 PM Monday - Friday*
 - *8 AM to 5 PM Monday - Friday*
 - *10 AM to 3 PM Monday - Thursday*
2. Add the first set of operating hours to the San Francisco Bay Area and Sacramento service territories via the Operating Hours field.
3. Add the second set of operating hours to Henry's service territory member record for the San Francisco Bay Area service territory via the Operating Hours field.
4. Add the third set of operating hours to Henry's service territory member record for the Sacramento service territory via the Operating Hours field.

Now, a dispatcher assigning service appointments to Henry knows which hours he is available to work in each territory.

SEE ALSO:

[Operating Hours Fields](#)

[Create Operating Hours](#)

Service Crew Scheduling Considerations

Review important information on how the Field Service Lightning managed package schedules service crews. These considerations apply only if the managed package is installed.

Absences

If the service resource representing a service crew has resource absences, those absences are considered in scheduling. Absences associated with individual crew member's corresponding service resources aren't considered.

Assigned Resources

When an appointment is assigned to a service crew, the service resource of type Crew and the service resources who are service crew members whose membership is active during the appointment time are added as assigned resources on the appointment. Whenever a service appointment's Scheduled Start changes or an assigned resource of type Crew is updated, this calculation is triggered so the assigned resource and sharing settings remain current. A change in a service crew membership record doesn't trigger the calculation.

If you want appointments that don't require crews to be assigned to individual service resources, use the Resource priority objective in your scheduling policies. Give your technicians a lower priority so the scheduler prefers to assign work to them. To prohibit the scheduling of all appointments to crews, assign a "No Crew" skill to your individual service resources. Then, add this skill as requirement to the work type, work order, or work order line item in question.

Capacity

Capacity-based scheduling isn't supported for service crews because a service resource of type Crew can't be capacity-based.

Efficiency

When an appointment is scheduled to a crew, the efficiency factor used to calculate the appointment's Scheduled End is taken from the Crew Efficiency field on the crew's service resource. The crew members' efficiencies aren't considered.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Geolocation Tracking and Service Territories

- The Last Known Location is tracked for crew leaders only. If a crew has more than one leader, the most updated location is displayed on the map.
- If a service resource is relocated to another service territory while they belong to a crew, the service resource membership record is drawn only on the relocation territory.
- A service crew member's home base is considered to be the home base defined for the service resource representing the crew they belong to.

Minimum Crew Size

Work orders, work order line items, and work types come with a Minimum Crew Size and a Recommended Crew Size. For example, a crew might have a recommended size of 3, but a minimum size of 2. Work orders and work order line items inherits their work type's crew size settings.

 **Note:** The crew size fields are hidden for all users by default. If you don't see them, you may need to update their field-level security settings in Setup.

The scheduler doesn't consider the Recommended Crew Size when assigning appointments. To determine whether a service crew fits the minimum crew size requirement for an appointment, the scheduler either counts the crew's service crew members or checks the Service Crew Size field on the Service Crew record. You can adjust these settings on the Service Crew Resources Availability work rule. If the Minimum Crew Size is blank or 1, the scheduler may assign the work to technicians or to crews.

The Service Crew Resources Availability work rule is configured in two ways:

- Compare a service appointment parent record's Minimum Crew Size field to the Crew Size field on the service crew.
- Compare a service appointment parent record's Minimum Crew Size field to the actual number of allocated service crew members at the time of the assignment. **Consider Service Crew Membership** must be selected on the Service Crew Resources Availability work rule.

If the Minimum Crew Size is blank or 1 on the service appointment's parent record, all service resources (of either the Crew or Technician type) are considered as candidates. This is also true for optimization, although a crew is not a candidate if it has no valid crew members and **Consider Service Crew Membership** is selected on the Service Crew Resources Availability work rule.

If your org was created before Spring '18, you need to create this work rule and add it to your scheduling policies.

Multi-Day Appointments

When a multi-day appointment is scheduled for a technician whose start date on a service crew is in the future, the multi-day appointment is elongated to last the duration of the technician's membership in the service crew.

Resource Preferences

The Required Resource and Excluded Resource work rules and the Preferred Resource service objective do not apply to service crew members. This is because service resources that belong to a crew aren't considered as candidates for assignments during the time in which they belong to the crew.

Scheduling Candidates

When the scheduler is looking for candidates to perform a job, only service resources of type Crew and Technician are considered as candidates. If a service resource is a current member of a service crew, the resource is not considered as a candidate. If a service resource is manually assigned to a service appointment while they belong to a crew, the dispatcher console shows a rule violation.

Utilizations

When utilization is calculated for the utilization view and metrics shown in the dispatcher console, a service crew member is considered to be utilized like the service resource representing the crew they belong to.

SEE ALSO:

[Group Service Crew Skills](#)

[Guidelines for Setting Up Your Workforce](#)

[Create Service Crews](#)

[Service Crew Fields](#)

[Service Crews in the Dispatcher Console](#)

Field Service Lightning Guidelines

Learn how and when to use Field Service Lightning features.

IN THIS SECTION:

[Guidelines for Setting Up Service Territories](#)

Learn how to use service territories to track where your field service team works.

[Guidelines for Setting Up Your Workforce](#)

Learn how to manage your field service workforce with the help of service resources and service crews.

[Guidelines for Setting Up Field Service Contractors](#)

If you're running a field service operation, it's likely that you work with contractors in addition to your full-time employees. Learn how to incorporate contractors into your field service processes.

[Guidelines for Using Work Orders](#)

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

[Guidelines for Using Work Types](#)

Learn how to use work types to save your field service team time and keep your processes consistent.

[Guidelines for Generating Work Orders from a Maintenance Plan](#)

Maintenance plans offer a quick way to automate the creation of work orders for periodic maintenance visits. Learn how to generate work orders from a maintenance plan.

[Guidelines for Using Knowledge with Work Orders](#)

You can attach knowledge articles to work orders, work order line items, and work types to connect technicians in the field with important procedural info, guidelines, and specs.

[Guidelines for Using Service Appointments](#)

A service appointment tracks field service work to be performed for a customer, and is associated with a work order or work order line item. Learn how to create and manage service appointments.

[Guidelines for Customizing Service Report Templates](#)

Service report templates in field service determine the type and organization of information in service reports. Follow these tips to make your service report templates the envy of other Salesforce admins.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

[Guidelines for Using Signatures on Service Reports](#)

Field service technicians can capture signatures from customers and partners for service reports. The number and type of signatures on a service report are defined beforehand on the service report template.

[Common Tasks in Inventory Management](#)

Learn how to perform everyday tasks in field service inventory management.

[How Product Transfers Work](#)

Product transfers track the transfer of inventory between locations in field service. Learn how to link product transfers to other inventory management records, and how they make it easy to manage inventory in both large and small field service operations.

[How Product Consumption Works](#)

When you consume products as part of a work order, logging the consumption in Salesforce kicks off several behind-the-scenes changes. Learn how product consumption fits into your field service operation.

[Guidelines for Creating Return Orders](#)

Learn how to use return orders to track the return and repair of products and inventory in field service.

Guidelines for Setting Up Service Territories

Learn how to use service territories to track where your field service team works.

Viewing Service Territories

View service territories on the Service Territories tab. You can also view a service resource's territories on the Service Territories related list on the resource detail page.

Creating Service Territories

If you want to use service territories, determine which territories you need to create. Depending on how your business works, you may decide to create territories based on cities, counties, or other factors. If you plan to build out a hierarchy of service territories, create the highest-level territories first. Service territory hierarchies can contain up to 10,000 territories.

Create service territories from the Service Territories tab in Salesforce. After you create a territory, you can add members to it via the Service Territory Members related list. Service territory members are resources who work within the territory, and associating them with a territory ensures that they're assigned to appointments near their home base.

 **Note:** When you create a service territory, public groups are created in your org. These groups are used with the Field Service Lightning managed package to ensure the correct data is available even when field service object access is set to private.

Assigning Service Territories to Service Resources

You can link a service resource to multiple territories to indicate where they are available to work. Assign territories to a resource via the Service Territories related list on the resource detail page, or via the Service Territory Members related list on the territory detail page.

When you assign a territory to a resource, use the Type field to indicate whether the territory is a primary, secondary, or relocation territory for the resource.

- The primary territory is typically the territory where the resource works most often—for instance, near their home base. Resources can have only one primary territory.
- Secondary territories are territories where the resource can be assigned to appointments if needed. A resource can have more than one secondary territory.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

- Relocation territories represent temporary moves. If you're using the Field Service Lightning managed package with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates. If they don't have a relocation territory, the primary territories are favored over the secondary.

Deleting Service Territories

You can't delete a service territory with service appointments. If you try to delete it, you're prompted to assign the appointments to a different territory.

If you delete a service territory with members, the resources who were members no longer have any connection to the territory.

Adding Locations to Service Territories

You can associate location records with service territories from the Service Territory Locations related list on the service territory. Add site, plant, and warehouse locations to the service territory in which they're located. Add mobile locations, like vans, to the service territories where they can be used for field service work.

SEE ALSO:

[Service Territory Fields](#)

[Configure Service Territory Settings](#)

[Create Service Territories](#)

Guidelines for Setting Up Your Workforce

Learn how to manage your field service workforce with the help of service resources and service crews.

Viewing Service Resources

View service resources on the Service Resources tab. In addition:

- Resources that are assigned to a service appointment appear in the Assigned Resources related list on the appointment detail page
- Resources that belong to a service territory appear in the Service Territory Members related list on the territory detail page
- Resources that belong to a service crew appear in the Service Crew Members related list on the service crew detail page

Creating Service Resources

Create service resources from the Service Resources tab. Service resources can represent users or groups of users (known as service crews). When creating service resources, follow these guidelines:

- To create a service resource that represents a user, select the user in the User lookup field and select a Resource Type of Technician.
- To create a service resource that represents a service crew, select the crew in the Service Crew field and select a Resource Type of Crew. Service resources that are crews can't be activated unless the crew has at least one active member.

Assigning Service Resources to Service Appointments

Assign a resource to a service appointment via the Assigned Resources related list on the appointment detail page. If needed, you can modify the related list layout from the Assigned Resources node in Setup. You can assign multiple resources to an appointment. Optionally, indicate which service crew a service resource belongs to in the Service Crew field on the assigned resource record.

To access assigned resource records, you need access to service appointments.

Deactivating Service Resources

For tracking purposes, resources can only be deactivated, not deleted. To deactivate a user, deselect **Active** on their detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

To deactivate a service resource, deselect **Active** on the service resource detail page. Service resources that belong to service crews can't be deactivated.

Deactivating a user deactivates the related service resource. You can't create a service resource that is linked to an inactive user.

Viewing Service Resource Schedules

The Service Appointments related list shows all appointments that a resource is assigned to, while the Absences related list on a resource lets you define periods of time when a resource is unavailable to work. Unless you're using the Field Service Lightning managed package with the scheduling optimizer, resources can still be assigned appointments that conflict with their absences.

 **Tip:** Create a trigger that sends an approval request to a supervisor when a resource creates an absence.

If you're not using the Field Service Lightning managed package, a calendar view isn't available for individual service resources.

Creating Service Crews

A service crew is a group of service resources whose combined skills and experience make them a good fit to work together on service appointments. For example, a wellhead repair crew might include a hydrologist, a mechanical engineer, and an electrician.

Create crews from the Service Crews tab. After you create a crew, add members to it from the Service Crew Members related list. Only active service resources of the Technician resource type can be added to crews.

The crews that a service resource belongs to appear in the Service Crews related list on the resource's detail page. You can also see all service crew memberships in the Service Crew Members tab in Salesforce. A service resource can be a member of multiple crews as long as the membership dates don't overlap.

Managing Crew Size

You can add crew size requirements to work types, work orders, and work order line items. The Recommended Crew Size and Minimum Crew Size fields guide dispatchers who are assigning service appointments. Work orders and work order line items inherit their work type's crew size values. If you enter a recommended crew size, you must enter a minimum crew size.

Assigning Crews to Service Appointments

Service appointments can only be assigned to service resources. Therefore, to assign a crew to a service appointment, you must create a service resource that represents the crew. From the Service Resources tab, click **New**. Select your crew in the Service Crew lookup field and select a Resource Type of Crew. Activate the service resource, fill out the other fields according to your needs, and save your changes.

Once your crew has a service resource to represent it, assign the crew to a service appointment from the Assigned Resources related list on the appointment. Select the representative service resource in the Service Resource field, and save your changes. The Assigned Resources related list now shows a single assignee.

Sharing and Service Crews

If you're using the Field Service Lightning managed package, reviewing these sharing considerations:

- When a service appointment is dispatched, service crew members in the assigned service crew get Read access to the appointment and its parent record, while the service crew leader gets Read/Write access.
- To modify the default sharing access, click the Field Service Settings tab in the managed package settings, then update your settings under Sharing Automation.

If you're not using the managed package, service crew leaders don't receive any extra permissions.

SEE ALSO:

[Set Up Your Workforce](#)

[Service Resource Fields](#)

Guidelines for Setting Up Field Service Contractors

If you're running a field service operation, it's likely that you work with contractors in addition to your full-time employees. Learn how to incorporate contractors into your field service processes.

Getting Set Up

The way you track contract work in Salesforce depends on how you want to track capacity, assign appointments, and exchange data with contractors. Follow these basic steps to add contractors to your org.

Step	Details
1. Create an account that represents the contractor.	For example, "Solar Installation Contracting."
2. Create contacts for the account.	You can create a contact for every contractor technician, or just for the contractor manager.
3. Make the contacts community users.	Depending on how you use communities, you can assign them the Customer Community Plus or Partner Community license.
4. Assign permission set licenses, create a contractor user profile, and configure object permissions.	<p>Assign field service permission set licenses to each user:</p> <ul style="list-style-type: none"> • The Field Service Scheduling permission set license includes the user in scheduling optimization • The Field Service Mobile permission set license gives the user access to the Field Service Lightning mobile app <p>For help assigning the permission set licenses, see Give Users Access to Field Service Lightning.</p> <p>Then, create a user profile for contractors (recommended) and configure their object permissions.</p> <p> Tip: To customize contractors' mobile app experience, assign a unique mobile settings configuration—accessible from the Field Service Mobile Settings page in Setup—to the contractor user profile.</p>
5. Create a service resource to represent the contractor users.	You can create service resources for every contractor technician or just for the contractor manager.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Assigning Service Appointments to Contractors

Ready to assign a work order to your contractor team? You've got options! Here are two common approaches to assigning work to contractors.

Approach	Best for you if...
<ul style="list-style-type: none"> • The contractor manager is a community user but not a service resource • The contractor technicians are service resources with Field Service Mobile licenses <ol style="list-style-type: none"> 1. The dispatcher shares the work order with the contractor manager. 2. In your community, the contractor manager uses the Book Appointment action to assign the associated service appointment to a technician. 3. The technician uses the mobile app to view the assignment, and update the service appointment and work order status when the work is complete. 	<ul style="list-style-type: none"> • You want to track individual contractor technicians' details in Salesforce • You want contractor technicians to be able to view or update appointment details in the field • You want the scheduling engine to consider each contractor technician's schedule when making assignments
<ul style="list-style-type: none"> • The contractor manager is a community user and a service resource • The contractor manager tracks the contractor technicians in a separate system <ol style="list-style-type: none"> 1. The dispatcher assigns the service appointment to the contractor manager by creating an assigned resource record. 2. The contractor coordinates with the contractor team to complete the work. 3. When the service appointment is complete, the contractor updates the service appointment and work order status from your Salesforce community. 	<ul style="list-style-type: none"> • You don't want to track individual contractor technicians' details in Salesforce • You want the contractor manager to be responsible for viewing and updating appointment details in the field • You don't need to differentiate between different contractor technicians' schedules when assigning work with the scheduling engine

 **Tip:** The Contractors list view in the dispatcher console Service Appointment List shows only service appointments that are assigned to capacity-based service resources.

SEE ALSO:

[Set Up Field Service in Communities](#)

[Set Up Your Workforce](#)

[Create Service Resources](#)

Guidelines for Using Work Orders

Work orders help you track tasks to be performed on a product. Learn how to create and manage work orders.

Viewing Work Orders

View work orders from the Work Orders tab. The Work Orders related list on the following record detail pages also lists the work orders associated with a record:

- Accounts
- Assets
- Cases
- Contacts
- Entitlements
- Maintenance plans
- Service contracts
- Return orders

 **Tip:** Add work orders to the console to view and edit work orders and their associated records in one place.

Creating Work Orders

Create and edit work orders from the Work Orders tab or the Work Orders related list on supported objects.

When you create a work order, add line items to the work order from the Work Order Line Items related list. Work order line items represent specific tasks that a technician must perform to complete the work order. They can be marked as completed one by one, and make it easier to track and improve field service processes. Pricing details like discounts and unit price are set at the line item level on work orders.

Deleting Work Orders

Delete work orders on the work order's detail page or the Work Orders related list. Deleting a work order moves it to the Recycle Bin. Any notes, attachments, activities, line items, and service appointments associated with the work order are also deleted. If you undelete the work order, the associated items are undeleted.

Work Order and Work Order Line Item Status

Work orders and their line items have a status to track progress towards completing the tasks or activities. You can define more status values in Setup.

Picklist Status	Status Category	Description
None	None	Default value
New	New	New work order, no activity has started
Canceled	Canceled	Work is canceled, typically before any work is started
In Progress	In Progress	Work has started

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Picklist Status	Status Category	Description
On Hold	On Hold	Temporary pause in work
Completed	Completed	Work completed successfully
Cannot Complete	Cannot Complete	Work couldn't be completed successfully
Closed	Closed	All work and associated activity is finished

 **Note:** The default status values on work orders and work order line items are automatically assigned to their corresponding status category (for example, the New status has a status category of New). If your org is older, existing status values may have a status category of None. To change an existing status value's status category from None, a little [housekeeping in Setup](#) is necessary.

Creating Work Order Hierarchies

Work orders can have parent and child relationships with each other. Child work orders are standalone records that can be scheduled, given statuses, and assigned. They can each have their own set of work order line items to describe the tasks required to perform the work.

Cancellations are a common reason to use parent and child work orders. When work is canceled, you can set the work order status to Canceled and create a child work order. This lets you track first-time rates and analyze cancellation reasons.

Sharing Work Orders

You may be able to grant extra access to work orders beyond what your org's default sharing model allows. However, you can't make the sharing model more restrictive than the default.

To see who has access to a work order, click **Sharing** on the work order's detail page. Work order line items inherit their parent work order's sharing settings.

To learn how to set up sharing rules to control work order sharing, see [Create Work Order Sharing Rules](#).

How Work Orders and Service Appointments Work Together

Service appointments on work orders and work order line items offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments track the details about the site visits and work performed.

Work orders and work order line items provide important capabilities such as relationships to price books and Salesforce Knowledge. The technician experience in the Field Service Lightning mobile app is also optimized for service appointments with work orders or work order line items as the parent record.

SEE ALSO:

[Set Up Work Orders](#)

[Work Order Fields](#)

Guidelines for Using Work Types

Learn how to use work types to save your field service team time and keep your processes consistent.

Inherited Values

Work orders and work order line items that contain a value in the Work Type field inherit the following values from their work type:

- Duration
- Duration Type
- Required skills (found in the Skill Requirements related list)
- Required products (found in the Products Required related list)
- Linked articles (found in the Articles related list)

Service appointments that contain a value in the Work Type field inherit their work type's Duration and Duration Type.

You can update a record's settings after they're inherited from the work type.

Skill Requirements

Skill requirements on work types represent the skills that are needed to complete the work. When a work order or work order line item is created and lists a work type, it inherits its work type's required skills. Define required skills in the Skill Requirements related list on a work type.

Skill requirements serve more as a suggestion than a rule. You can still assign a work order, work order line item, or related service appointment to a service resource that does not possess the required skills.

If you add a work type to an existing work order, the work order only inherits the skill requirements if the work order didn't yet have any. Similarly, updating a work type's skill requirements doesn't affect work orders that were already created using that work type.

The previous rules are also true for work order line items. Work order line items don't inherit their parent work order's skill requirements.

 **Note:** Customizations to required skills, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.

Required Products

Required products on work types represent the products that are needed to complete the work. When a work order or work order line item is created and lists a work type, it inherits its work type's required products. Define required products in the Products Required related list on a work type.

If you add a work type to an existing work order, the work order only inherits the required products if the work order didn't yet have any. Similarly, updating a work type's required products doesn't affect work orders that were already created using that work type.

The previous rules are also true for work order line items. Work order line items don't inherit their parent work order's required products.

 **Note:** Customizations to required products, such as validation rules or Apex triggers, are not carried over from work types to work orders and work order line items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Auto-Created Service Appointments

If the Auto-Create Service Appointment option on a work type is selected, a service appointment is created when the work type is applied to a work order or work order line item. The service appointment lists the work type in its Work Type field and inherits the work type's Duration and Duration Type. A service appointment isn't created if the work order or work order line item already has an appointment.

If a user selects Auto-Create Service Appointment on an existing work type, service appointments aren't created on work orders and work order line items that were already using the work type.

Knowledge Articles

When you attach a knowledge article to a work type, the article shows up on work orders and work order line items that use the work type. For example, if you have a work type named Solar Panel Replacement, you can attach an article that explains how to replace a solar panel. Any work order using that work type automatically includes the article, and the person assigned to the work order has the instructions at their fingertips.

Articles on work types work a little differently than articles on work orders and work order line items. Here are the differences:

- A Linked Work Types related list isn't available on article page layouts, so you can't see which work types an article is attached to.
- The Knowledge One widget isn't available on work types in the console in Salesforce Classic, but the Articles related list is.
- To ensure that field service records are associated with the most current versions of knowledge articles, articles attached to work types don't specify an article version. For this reason:
 - When work orders and work order line items inherit an article from their work type, they inherit the latest version of the article published in their org's default Knowledge Settings language.
 - An article attached to a work type may display in a different title or language in the Articles related list versus in the Knowledge Lightning component. The Articles related list reflects the article version that is inherited by work orders and work order line items using the work type.

To allow knowledge articles to be attached to work types, add the Articles related list to your work type detail page layout, and add the Knowledge component to the layout in Lightning Experience.

Here's how to attach an article to a work type.

- In Lightning Experience, search for an article in the Knowledge component, then select the option to attach it.
- In Salesforce Classic, click **Find Article** in the Articles related list and attach the desired article.

SEE ALSO:

[Create Work Types](#)

[Work Type Fields](#)

[Track Required Parts](#)

[Add Required Skills to Work Orders or Work Types](#)

Guidelines for Generating Work Orders from a Maintenance Plan

Maintenance plans offer a quick way to automate the creation of work orders for periodic maintenance visits. Learn how to generate work orders from a maintenance plan.

How many work orders are generated at a time?

Maintenance plan work orders are generated in batches. The number of work orders in a batch is based on several different maintenance plan settings:

- Generation timeframe, which determines how far into the future work orders will be generated
- Frequency, which determines the amount of time between work order dates
- Number of maintenance assets, because one work order is created per asset, per maintenance date

For example, with a generation timeframe of 1 year, a frequency of 2 months, and two maintenance assets, one batch contains 14 work orders that cover one year's worth of maintenance visits. (Work orders are also generated for the final day of the timeframe: if the generation timeframe is one year and the Date of the first work order in the next batch is January 1, 2019, work orders are also generated for January 1, 2020.)

How do I generate work orders?

You can manually generate each batch of work orders or choose to have a new batch generated automatically when the current batch nears completion. Manual generation gives you a bit more control if frequent changes are needed after each visit. Automatic generation provides the assurance that you're delivering the maintenance service you promised to your customer.

To manually generate work orders from a maintenance plan:

- Confirm that **Auto-generate work orders** isn't selected
- Click **Generate Work Orders**. When the Work Order Generation Status on the maintenance plan changes to Complete, the newly generated work orders appear in the Work Orders related list.

To turn on automatic generation, select **Auto-generate work orders**.

If auto-generation is turned on, when is a new batch generated?

- If the maintenance plan includes assets, a new batch is generated for each maintenance asset on the Date of the first work order in the next batch listed on the maintenance asset.
- If the maintenance plan doesn't include any assets, a new batch is generated on the Date of the first work order in the next batch listed on the maintenance plan

You can further customize batch generation timing by specifying a Generation Horizon (Days) or selecting **Generate new batch upon completion**. For details, see [Maintenance Plan Fields](#).

 **Note:** If both **Auto-generate work orders** and **Generate new batch upon completion** are selected, Salesforce doesn't generate a new batch of work orders for a maintenance asset until the final work order for that asset in the current batch is completed. If

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one maintenance asset's final work order is completed but another's is stalled, work orders are only generated for the first maintenance asset, causing the plan's batch generation schedule to become staggered.

SEE ALSO:

[Create Maintenance Plans](#)

[Maintenance Plan Fields](#)

Guidelines for Using Knowledge with Work Orders

You can attach knowledge articles to work orders, work order line items, and work types to connect technicians in the field with important procedural info, guidelines, and specs.

 **Important:** Before you get started, follow the steps in [Configure Work Order Settings](#) to set up your org for Knowledge and field service.

Attaching an Article

You can search for and attach articles to a record from the Articles related list, the Knowledge One console widget, and the Knowledge component in Lightning Experience.

- *In Salesforce Classic:* In the Articles related list on a record, click **Find Article** to search for an article, then select the option to attach it.
- *In the Salesforce Classic console:* To attach articles to work types, use the Articles related list on the work type. To attach articles to work orders or work order line items, use the Knowledge One widget or the Articles related list.
- *In Lightning Experience and the Lightning Experience console:* In the Knowledge component on a record, search for the article and then select the option to attach it.

Viewing an Attached Article

Attached articles appear in the Articles related list, Knowledge Lightning component, and Knowledge One console widget. View an article by clicking its title. You can also navigate to attached articles from the feed of a record if feed tracking for related lists is enabled.

On article detail pages in Salesforce Classic, the Linked Work Orders and Linked Work Order Line Items related lists show which records an article is attached to. A Linked Work Types related list isn't available.

Detaching an Article

Detach articles from the Articles related list or Knowledge One console widget in Salesforce Classic, and from the Knowledge component in Lightning Experience.

Updating an Attached Article

If an article is out of date, publish a new version by navigating to the article and clicking **Edit**.

When you attach an article to a work order or work order line item, that version of the article stays associated with the record even if later versions are published. If needed, you can detach and reattach an article to ensure that the record is linked to the latest version of the article. The Linked Article Version field on the linked article detail page leads to the attached version.

 **Note:** Only one version of an article can be attached to a record.

Customizing Article Suggestions

On work orders and work order line items in the console, the Knowledge One widget suggests articles to attach based on key fields. You can select the fields that suggestions are based on. Article suggestions aren't available in the Knowledge Lightning component.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To attach or detach an article on a work order or work order line item:

- Read on work orders AND Read on the article type AND Knowledge enabled

To attach or detach an article on a work type:

- Read on work types AND Read on the article type AND Knowledge enabled

To edit page layouts:

- Customize Application

To edit console layouts:

- Customize Application AND Service Cloud User

1. From Setup, enter *Field Service* in the Quick Find box, then select **Field Service Settings**.
2. In the work order and work order line item field lists, select which fields you want the search engine to use when suggesting relevant articles from your knowledge base.
3. Save your changes.

Managing Linked Articles

Customize linked articles' page layouts, fields, validation rules, and more from the Linked Articles node in Setup under Knowledge.

To learn how to configure your console and page layouts so articles can be attached to work orders and work order line items, see [Set Up Work Orders](#).

 **Note:** Linked articles include the following limitations.

- Quick actions and global actions aren't supported for linked articles.
- The Article widget and Feed Articles Tool aren't available in the feed view.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic. In the Salesforce app, linked articles can't be accessed from feed items.
- The Linked Work Orders and Linked Work Order Line Items related lists on articles are available only in Salesforce Classic. A Linked Work Types related list isn't available in any platform.
- The Knowledge One widget isn't available on work types in the console. To manage linked articles on work types in the console, use the Articles related list.
- Linked articles are read-only in the Salesforce mobile app.

SEE ALSO:

[View Knowledge Articles in the Field Service Lightning Mobile App](#)

[Set Up Work Orders](#)

[Linked Article Fields](#)

[Work Order Fields](#)

[Field Service Lightning Limits and Limitations](#)

Guidelines for Using Service Appointments

A service appointment tracks field service work to be performed for a customer, and is associated with a work order or work order line item. Learn how to create and manage service appointments.

Viewing Service Appointments

View service appointments on the Service Appointments tab and in the Service Appointments related list on work orders, work order line items, and service resources.

Creating Service Appointments

Create service appointments from the Service Appointments tab or related list.

 **Note:** On the Service Appointments related list on a service resource record, you can't create new appointments, but you can assign the resource to existing appointments.

Deleting Service Appointments

You can delete a service appointment to indicate that it has been canceled, or just change its status to Canceled. Deleting a record, like a work order, deletes its child service appointments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Associating Service Appointments with Other Records

Service appointments always have a parent record, which can be a work order, work order line item, opportunity, account, or asset. The type of parent record tells you about the nature of the service appointment:

- Service appointments on *work orders* and *work order line items* offer a more detailed view of the work being performed. While work orders and work order line items let you enter general information about a task, service appointments are where you add the details about scheduling and ownership. If you select **Auto-Create Service Appointment** on a work type, a child service appointment is added to all work orders or work order line items created from the work type. In addition, the Field Service Lightning managed package scheduling engine is based on service appointments.
- Service appointments on *assets* represent work being performed on the asset.
- Service appointments on *accounts* represent work being performed for the account.
- Service appointments on *opportunities* represent work that is related to the opportunity.

For example, suppose you create a work order to track a customer's annual refrigerator maintenance. In the Service Appointments related list on the work order, you create an Annual Maintenance appointment.

During the appointment, the technician completes most of the maintenance but determines that a replacement part must be ordered and installed. The technician changes the appointment status to Cannot Complete, and a second service appointment is created on the work order to track the installation. When the second appointment is completed and it is determined that the fridge is fully repaired, the second appointment and the work order can then be closed.

SEE ALSO:

[Create Service Appointments](#)

[Service Appointment Fields](#)

[Field Service Lightning Limits and Limitations](#)

Guidelines for Customizing Service Report Templates

Service report templates in field service determine the type and organization of information in service reports. Follow these tips to make your service report templates the envy of other Salesforce admins.

Adding Fields

Service reports can contain fields from multiple objects. To add a field, select the object in the top left section of the editor, then locate and drag the field onto your layout.

Use the Section element to organize fields on your layout. Your template comes with several default sections, which you can modify, rename, or delete. Click the wrench icon on a section to change the number of columns, edit or hide the title, and more.

Adding Related Lists

To add a related list to your template, drag the List element onto the layout. Enter a title, select the object, and select fields to display in the related list.

To hide unneeded records from a related list on generated service reports, create a filter. For example, set up a filter so the Work Order Line Items related list on work order service reports only shows completed line items.

Related list filters on service report templates work just like regular list view filters. You can create up to five filters per related list. Here's how to set up a filter.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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1. From the service report template editor, check the Related Templates field to make sure you're editing the desired sub-template.
2. On the related list you want to filter, click the wrench icon and select the Filters tab.
3. Select a checkbox or picklist field to define the filter, and choose an operator.
4. Click the lookup icon to select one or more values, or enter values manually, separated by commas. Only records that list a selected value in the filter field appear in service reports that use the template.

 **Note:** Deactivated picklist values don't appear in the lookup, but you can enter them manually.

5. Click **OK** and save your changes.

The filter you created is reflected in service reports that use your template.

 **Note:**

- The Status field on contract line items isn't available for filtering
- The Filters tab isn't available in Internet Explorer 8

Adding Signatures

To let technicians collect signatures on a service report, drag the Signature element onto your layout. You can add up to 20 signature blocks to a sub-template. Every signature block needs a different signature type. To learn more about signatures, see [Guidelines for Using Signatures on Service Reports](#).

Adding Other Design Elements

- To add your company logo to service reports, drag the Text/Image Field element onto the layout and upload your logo. Images can be added to the header, footer, and body of a service report template.
- To customize the footer and add page numbers, click the wrench icon on the footer section. For example, add the Work Order Number field.
- To add space between fields or sections in the template, use the Blank Space field. Each Blank Space field adds 5 pixels of vertical space to the report PDF.

SEE ALSO:

[Field Service Lightning Limits and Limitations](#)

[Create Service Report Templates](#)

[Service Report Fields](#)

Guidelines for Using Signatures on Service Reports

Field service technicians can capture signatures from customers and partners for service reports. The number and type of signatures on a service report are defined beforehand on the service report template.

Setting Up Signature Types

The Signature Type field on digital signatures represents the role of the person signing a service report. It helps you ensure that your service reports are signed by the proper people.

For example, suppose that whenever your company performs preventive maintenance on an asset, you want both the customer and the technician to sign the final service report. Those signatures tell you that everyone agrees on the work that was completed, and help prevent future squabbles.

Your org comes with just one signature type, Default. A service report template can only contain one signature per type. If you plan to collect multiple signatures on service reports, create additional signature types in Setup by editing the Signature Type picklist field on the Digital Signature object.

Create at least one value for every role that might need to sign a service report. For example, Technician, Customer, Supervisor, or Supplier. If you want some service reports to be signed by multiple people in one role—for example, all technicians present at an appointment—create numbered types: Technician 1, Technician 2, and so forth.

 **Note:** You can create up to 1,000 signature types. You can't delete signature types, but you can deactivate them so they can't be used in service report templates. When you deactivate a type, it still appears on service report templates that used it, but isn't available for new service report templates.

Adding Signature Blocks to Service Report Templates

To create or edit service report templates, in Setup, enter *Service Report Templates* in the Quick Find box, then select **Service Report Templates**.

To add a signature block to a service report template, open the service report template and drag the Signature element to the template layout. The signature block's settings display, which you can modify as needed. The Type field is required in signature blocks. Make sure to also add the Signature field, which is the designated space for the signature. You can update the title of each signature block to reflect who is signing, or hide the title and field labels.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Dragging a signature element to a service report template layout displays its settings.

You can add up to 20 signature blocks to a service report template. Double-click the title of any signature block to display its settings.

Note: Because only one signature per type is allowed on a report, you can't drag additional signature blocks onto a template until you've defined additional Signature Type values. Signature blocks can't use multiple columns.

Capturing Signatures for Service Reports

Signatures are captured from the Field Service Lightning mobile app. Captured signatures aren't reused in future versions of the report.

For example, suppose a technician generates a service report for a service appointment and the customer signs the report. Then, the technician updates the service notes to add a recommendation. If the technician re-generates the service report, the customer's signature doesn't appear on the new report.

If you'd like signatures to be reused across all service report versions, contact Salesforce.

SEE ALSO:

[Create Service Reports in the Field Service Lightning Mobile App](#)

[Service Report Fields](#)

[Set Up Service Reports](#)

Common Tasks in Inventory Management

Learn how to perform everyday tasks in field service inventory management.

This table explains at a high level how to complete common tasks using Salesforce's out-of-the-box inventory management features. For more detailed step-by-step instructions, refer to the provided links.

I Want To...	How To Do It	Example
Track the quantity of a particular product stored at a particular location	Create a product item record associated with the product and the location, and specify the quantity stored there. Helpful links: <ul style="list-style-type: none"> Create Parts 	To track the number of wheelbarrows stored at Warehouse B, create a product item whose Location is Warehouse B and Product is Wheelbarrow.
Find out what's in a particular location's inventory	Look at the Product Items related list on the location record. Helpful links: <ul style="list-style-type: none"> Create Field Service Locations 	To find out what is stored in Warehouse A, look at the Product Items related list on the Warehouse A location record.
Find out the quantity of a particular part across all inventory locations	Look at the Product Items related list on the product record. Helpful links: <ul style="list-style-type: none"> Create Parts 	To find out how many wheelbarrows you have in your inventory and where they are stored, look at the Product Items related list on the Wheelbarrow product record.
Review changes to the stock of a particular product at a particular location	Look at the Product Item Transactions related list on the product item. Helpful links: <ul style="list-style-type: none"> How Product Transfers Work 	To review the use, transfer, and restock of extra-large bolts at Warehouse C, look at the Product Item Transactions related list on the product item whose Product is Extra-Large Bolt and Location is Warehouse C.
Specify that a certain part is needed to complete a work order	Create a record in the Products Required related list on the work order. Helpful links: <ul style="list-style-type: none"> Track Required Parts 	To let the assigned technicians know that they will need a forklift to complete work order #00046982, create a product required for the Forklift product on the work order.
Request more parts from another inventory location when my stock gets low	Create a product request to indicate what's needed. Create a product request line item for each product requested. Helpful links: <ul style="list-style-type: none"> Request Parts 	To request a restocking of 20 boxes of nails and 10 hammers for your service vehicle, Van A, create a product request for the Van A location. Include one product request line item for the nails, and another for the hammers.

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I Want To...	How To Do It	Example
Transfer parts between inventory locations	<ol style="list-style-type: none"> 1. Create a product transfer. Make sure to specify the quantity, source location, destination location, and source product item (which represents the stock that the items are being transferred from). 2. Create a shipment to track the transfer's shipping details. 3. Mark the product transfer received when the items arrive. <p>Helpful links:</p> <ul style="list-style-type: none"> • Transfer Parts • How Product Transfers Work 	<p>To transfer 25 tires from Warehouse A to Warehouse B, create a product transfer with these settings:</p> <ul style="list-style-type: none"> • Source Location: Warehouse A • Source Product Item: Warehouse A Tires • Destination Location: Warehouse B • Quantity: 25 • Quantity Unit of Measure: Each <p>Create a shipment to track the shipping details for the tire transfer.</p> <p>Select Received on the product transfer when the tires arrive at Warehouse B.</p>
Transfer parts from an outside vendor to an inventory location	<ol style="list-style-type: none"> 1. Create a product request, listing the outside vendor as the account. 2. Create a product transfer. Make sure to specify the quantity, destination location, and product. 3. Create a shipment to track the transfer's shipping details. 4. Mark the product transfer received when the items arrive. <p>Helpful links:</p> <ul style="list-style-type: none"> • Request Parts • Transfer Parts • How Product Transfers Work 	<p>To transfer 20 safety glasses from your safety equipment provider to Service Van A, create a product request that lists your outside vendor as the Account. Then, create a product transfer with these settings:</p> <ul style="list-style-type: none"> • Product: Safety Glasses • Destination Location: Service Van A • Quantity: 20 • Quantity Unit of Measure: Each <p>Because the items are coming from outside of your inventory, leave the Source Location and Source Product Item blank.</p> <p>Create a shipment to track the shipping details for the glasses transfer.</p> <p>Select Received on the product transfer when the glasses arrive at Service Van A.</p>
Indicate that parts from your inventory were consumed while completing a work order	<p>Create a product consumed record on the related work order.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Track Consumed Parts • How Product Consumption Works 	<p>You used 15 bolts from your service van, Service Van A, to complete work order #00046982. To track the consumption, create a product consumed record on the work order with these settings:</p> <ul style="list-style-type: none"> • Product Item: Service Van A Bolts • Quantity Consumed: 15 <p>The product item quantity is automatically reduced by 15 to reflect that the bolts are no longer in stock.</p>

I Want To...	How To Do It	Example
Track the return of a customer product	<p>Create a return order that lists the related case, order, or product.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Create Return Orders • Guidelines for Creating Return Orders 	<p>A customer creates a case from the customer community to return a glass door. To track the return, create a return order which lists the related Order. Add a return order line item that lists the corresponding Order Product for the glass door.</p> <p>Create a product transfer to track the return of the product to the warehouse. Upon its arrival, increase the quantity on the glass door product item by 1.</p>
Track the repair of a customer product	<ol style="list-style-type: none"> 1. Create a work order to repair the product. 2. Create a return order that tracks the return of the product to the repair workshop. 3. When the product is repaired, create a product transfer to track the return of the product back to the customer. <p>Helpful links:</p> <ul style="list-style-type: none"> • Create Return Orders • Guidelines for Creating Return Orders 	<p>A customer calls your company to request a repair of their front gate. Create a work order, and then create an associated return order that tracks the return of the gate to the workshop.</p> <p>After the gate is repaired, mark the work order complete. Create a product transfer to track the return of the gate from the workshop to the customer.</p>
Track the return of unused inventory from my stock back to the warehouse	<p>Create a return order that lists the unused inventory in the Product or Product Item field.</p> <p>Helpful links:</p> <ul style="list-style-type: none"> • Create Return Orders • Guidelines for Creating Return Orders 	<p>To prepare for an on-site installation appointment, create a product request for three motors. Upon arriving at the site, you learn that only two motors are needed. To return the unwanted motor to the main warehouse, create a return order with one line item that lists the motor in the Product field.</p> <p>After the motor is returned to the warehouse, increase the quantity of the motor product item by 1.</p>

SEE ALSO:

[Set Up and Manage Your Inventory](#)

How Product Transfers Work

Product transfers track the transfer of inventory between locations in field service. Learn how to link product transfers to other inventory management records, and how they make it easy to manage inventory in both large and small field service operations.

Associating Product Transfers with Product Requests

While product transfers are typically created in response to a product request, they don't have to be. For example, when a new technician joins your team, you can create a series of product transfers to track the initial stocking of their service vehicle.

If the product transfer is fulfilling a product request, create one product transfer for each product request line item. This way, you can track the status of each part being requested. The Product Transfers related list on a product request lists all product transfers associated with the request's line items. In addition, product request line items have their own Product Transfers related list that shows related transfers.

Associating Product Transfers with Shipments

To get more visibility into the movement of inventory between locations, create shipments and link them to product transfers. Shipments contain information about the products on board, the shipping carrier, and the expected delivery date. While shipments are an optional part of inventory management, they make it easier to stay informed about the coming and going of parts in your inventory.

For example, you create a product request for 50 hammers and 40 boxes of nails at Warehouse C. The product request has two line items: one for the hammers, and one for the nails. To fulfill the request, your inventory manager creates two product transfers—one for each product request line item—that indicate that the hammers and nails should be transferred from Warehouse B. Then, he creates a shipment to track the transfer, and enters it in the Shipment field on both product transfers. Now, anyone looking at the product request can see the related product transfers, and refer to their related shipment to find out where the hammers and nails are on their inter-warehouse journey.

A shipment can be associated with multiple product transfers, shown in the Product Transfers related list. A shipment's product transfers can each be related to different product request line items from one or more product requests.

Updating or Deleting Product Transfers

If a product transfer hasn't yet been marked received, you can edit it normally. Received transfers cannot be updated, but you can delete them if needed. When you delete a transfer:

- The Quantity on Hand of the source and destination product items reverts to the pre-transfer quantity
- Product item transactions with a transaction type of Adjusted are added to the source and destination product items

Marking Product Transfers Received

When you select **Received** on a product transfer, that indicates that the items have been added to the inventory at their destination location. Marking a product transfer received causes several record updates that keep your inventory numbers accurate:

- **Product items are updated or created.** Product items track the quantity of a particular product at a particular location—for example, a product item can represent all the hammers at Warehouse A. When a product is transferred from one location to another, the quantity of the source location product item is reduced to reflect the transfer. In addition, one of two things happens:
 - If there's already a product item that represents the transferred products stored at the destination location, the quantity of that product item is increased to reflect the transfer.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

- If such a product item doesn't exist (in other words, if it's the first time that the product is being stored at the location), a product item is automatically created that reflects the quantity transferred there.

For example, if Service Van B has never contained any hammers, there probably isn't a product item record representing the hammers stored at Service Van B. In that case, when hammers are transferred to Service Van B, a product item is automatically created whose quantity reflects the number of hammers transferred there.

- **Product item transactions are created.** When you mark a transfer received, a product item transaction with a type of "Transferred" is created to represent the addition of stock at the destination location. If a source location or source product item is specified, a second transaction is created to represent the removal of stock from the source location. The first transaction's quantity is positive because stock is being added; the second transaction's quantity is negative. These transactions appear in the Product Item Transactions related list on the related product transfer, source product item, and destination product item. They let you quickly review past transactions at your inventory locations.

 **Example:** Warehouse A has 100 hammers in stock. Your new technician, Jessica, has received her service van, and you've created a location to represent the van in Salesforce. You create a product transfer to track the transfer of five hammers from Warehouse A to Jessica's van. Since Jessica's van hasn't contained hammers before, selecting Received on the transfer causes the following events.

- The quantity on the existing product item for hammers stored at Warehouse A is reduced from 100 to 95
- A second product item is created with these settings:
 - Product: Hammer
 - Quantity: 5
 - Location: Jessica's Van
- A product item transaction is created for the hammer product item with a transaction type of Transferred and a quantity of 5

SEE ALSO:

[Transfer Parts](#)

[Request Parts](#)

[Part Request and Transfer Fields](#)

How Product Consumption Works

When you consume products as part of a work order, logging the consumption in Salesforce kicks off several behind-the-scenes changes. Learn how product consumption fits into your field service operation.

How to Track Product Consumption

When a technician uses a product during a field visit, they can create a product consumed record from the Products Consumed related list on the related work order or work order line item. For example, a work order can have one product consumed record representing the consumption of 10 bolts, and another representing the consumption of two batteries. Products consumed are typically associated with a *product item* that represents where the item was stored before use.

Why to Track Product Consumption

Tracking product consumption in Salesforce helps you know when and why items from your inventory are used, and when your stock is running low. When you create a product consumed

EDITIONS

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record on a work order or work order line item, the quantity listed on the related product item updates automatically to reflect the consumption.

For example, suppose you have a product item representing the bolts stored in your service van. You use 10 bolts to complete a work order, so you create a product consumed record on the work order to track the consumed bolts. Creating the product consumed reduces the quantity of the product item representing bolts in your van by 10, and makes it easy to keep an eye on inventory levels.

 **Note:** If you want your team to log product consumption but aren't interested in tracking the movement of inventory between locations, you can skip creating locations and product items and fill in the Price Book Entry field on product consumed records to indicate which product was consumed. However, this approach offers a limited view of your inventory.

Viewing Updates to Product Consumed Records

Product item transactions are auto-generated records that reflect changes made to product items in your org. They appear in the Product Item Transactions related list on related records. Most actions that you take on products consumed result in a product item transaction:

- **Creating a product consumed:** A product item transaction is created on the product item with a type of Consumed and a negative quantity equal to the quantity consumed. Because access to product item transactions is determined by product item access, you need permission to view product items before you can create products consumed.
- **Changing the quantity on a product consumed:** You may need to change the quantity on a product consumed to indicate that fewer or more items were consumed. In this case, a product item transaction is created with a type of Adjusted and a negative quantity equal to the additional quantity consumed. For example, if a technician updates a product consumed to indicate that two more bolts were used, the new product item transaction's quantity would be -2 .
- **Deleting a product consumed:** Deleting a product consumed is considered a type of adjustment. A product item transaction of type Adjusted is created with a positive quantity equal to the quantity consumed.

SEE ALSO:

[Track Consumed Parts](#)
[Parts and Inventory Fields](#)

Guidelines for Creating Return Orders

Learn how to use return orders to track the return and repair of products and inventory in field service.

You can use return orders to track customer returns, customer repairs, or the return of inventory from a technician's van stock to a warehouse or supplier. Customers can initiate a return from a community, or agents can create return orders in response to a customer call or technician request.

Return orders are available in Lightning Experience, Salesforce Classic, the Salesforce app, the Field Service Lightning mobile app for Android and iOS, and communities built using Salesforce Tabs + Visualforce.

Creating Return Orders

Create return orders from the Return Orders tab or the Return Orders related list on accounts, contacts, product requests, cases, orders, or locations.

You can associate return orders with product requests, cases, accounts, contacts, orders, work orders, and more. This versatility lets you use return orders to track a wide range of return scenarios. It's up to you to decide how return orders fit into your field service processes. For example, to minimize processing time, don't associate return orders with product transfers.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

When you create a return order, add return order line items to track the specific items being returned or repaired. Each line item must list one or more of the following: product, product item, asset, product request line item, and order product. If you select more than one of these fields on a return order line item, make sure they all link to the same product.

- !** **Important:** If you fill out the Product Item field on a return order line item, remember that product items that list a serial number can't be transferred between inventory locations. If the item was already tracked as a serialized asset in Salesforce, we recommend noting the serial number using a custom field or other method. That way, you can use product transfers to track the item's movement to and from workshops, warehouses, and customer sites.

Common Return Order Scenarios

Customer Returns

When a customer wants to return a product, create a return order. Follow these guidelines.

- On the return order:
 - If a customer case was created to address the return, select it in the Case field.
 - In the Source Location field, select the customer's site where the product is located at the start of the return. You may need to leave this field blank if the customer's site isn't tracked as a location in Salesforce.
 - In the Destination Location field, select the inventory location where the item is returned for restocking, or the workshop where the item is salvaged or discarded.
 - In the Ship From address, enter the customer's address where the product is at the start of the return.
- On the return order line item:
 - To represent the items being returned, fill out one or more of the following fields: product, product item, product request line item, and order product. For customer returns, you'll likely use the Asset or Order Product fields.

For example, a customer of a hypothetical robotic arms company, Rockin' Robotics, purchased a small hydraulic arm by mistake. To return it, they create a case from the customer community. The assigned agent creates a return order for the customer which lists the related order and order product. The agent then creates a product transfer to track the return of the arm to the warehouse. Upon its arrival, the on-site technician updates the quantity on the appropriate product item to indicate that the warehouse has gained a small hydraulic arm.

Customer Repairs

When a customer wants their product repaired or retrofitted, use a return order to track the repair and return of the product. Follow these guidelines.

- On the return order:
 - Link the return order to related work orders in the Work Orders or Work Order Line Items related lists. Most repairs involve a work order that was created for the customer.
 - If a customer case was created to address the repair, select it in the Case field
 - In the Source Location field, select the customer's site where the product is at the start of the return. You may leave this field blank if the customer's site isn't tracked as a location in Salesforce.
 - In the Ship From address, enter the customer's address where the product is at the start of the return.
 - In the Destination Location field, select the workshop where the product is repaired. You can use product transfers to track the movement of the product to and from the workshop.
- On the return order line items:
 - In the Repayment Method field, if the item will be returned to the customer after repair, select Return.
 - To represent the items being repaired, fill out one or more of the following fields: product, product item, product request line item, and order product. For customer repairs, you'll likely use the Asset or Order Product fields.

For example, a Rockin' Robotics customer wants their eight-year-old hydraulic arm retrofitted to use the most current technology. They call Rockin' Robotics and the support agent creates a work order to have the arm retrofitted. The agent then associates the work order with a return order that tracks the return of the arm to the Rockin' Robotics Workshop. After the arm is retrofitted, the work order is marked complete and a product transfer is created to track the return of the arm from the workshop to the satisfied customer.

Technician Returns

When a product is requested for a field service job but ends up going unused for any reason, use a return order to track the return of the product to the supplier or an inventory location. Follow these guidelines.

- On the return order:
 - In the Product Request field, select the product request that the product was intended to fulfill. You can also associate the return order line items with the product request's line items.
 - In the Account field, select the account that the product was intended for.
 - In the Source Location field, select the product's location at the time of the creation of the return order. For example, a technician's service vehicle.
 - In the Destination Location field, select the product's intended destination. For example, an inventory location such as a warehouse, or a supplier's site.
 - In the Ship From address, enter the starting address of the return.
- On the return order line items:
 - If the return order lists a product request, select the relevant product request line item in the Product Request Line Item field.
 - If the return doesn't involve reimbursement (which is likely), set the Repayment Method to None.
 - In the Processing Plan field, select Restock if the item is returning to your inventory
 - To represent the items being returned, fill out one or more of the following fields: product, product item, product request line item, and order product. For technician returns, you'll likely use the Product Request Line Item, Product, or Product Item fields. If you select a product item, choose the product item that is associated with the product's source location.
- If needed, create an associated product transfer to track the transfer of the product from its current location back to your inventory.

For example, to prepare for an on-site installation appointment, a Rockin' Robotics technician creates a product request for three large hydraulic arms. Upon arriving at the site, the technician learns that only two arms are needed. To return the unwanted arm to the main warehouse, the technician creates a return order with one line item that lists the arm in the Product field. After the arm is returned to the warehouse, the warehouse product item can be updated to reflect the change in inventory numbers.

 **Note:** While you can track the return of products to your inventory using only a product transfer, return orders let you add information about why the product is being returned.

SEE ALSO:

[Create Return Orders](#)

[Return Order Fields](#)

[Report on Field Service Lightning](#)

Field Service Lightning Object Fields

Learn about the fields available on Field Service Lightning standard objects.

IN THIS SECTION:

[Field Service Lightning Objects](#)

When you enable Field Service Lightning, you gain access to a suite of standard Salesforce objects.

[Linked Article Fields](#)

A linked article is a Knowledge article that is attached to a work order, work order line item, or work type. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Location Fields](#)

Locations, addresses, and associated locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Maintenance Plan Fields](#)

Maintenance plans and maintenance assets have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Operating Hours Fields](#)

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Part Request and Transfer Fields](#)

Product requests, product request line items, product transfers, and shipments have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

[Parts and Inventory Fields](#)

Product items, product item transactions, products required, and products consumed have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

[Return Order Fields](#)

Return orders and return order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Appointment Fields](#)

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Crew Fields](#)

Service crews and service crew members have the following fields. Depending on your page layout and field-level security settings, you may not be able to view or update some of them.

[Service Report Fields](#)

Service reports and digital signatures on service reports have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

[Service Resource Fields](#)

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Service Territory Fields

Service territories, service territory members, and service territory locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Skill Fields for Field Service

Skills represent certifications and areas of expertise in your field service workforce. Skills, service resource skills, and skill requirements have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Time Sheet Fields

Time sheets and time sheet entries have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Work Order Fields

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Work Order Line Item Fields

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Work Type Fields

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Service Lightning Objects

When you enable Field Service Lightning, you gain access to a suite of standard Salesforce objects.

 **Note:** This list doesn't include sharing, feed, or history objects.

Object Name	Definition	Tab in Salesforce?
Address	Address associated with a location.	
App Extension	Link between the Field Service Lightning mobile app and other mobile apps.	
Assigned Resource	Service resource who is assigned to a service appointment.	
Associated Location	Location linked to a specific account.	
Digital Signature	Captured signature from a field service customer or technician.	
Field Service Mobile Settings	Represents a collection of settings related to the Field Service Lightning mobile app.	
Linked Article	Knowledge article that is attached to a work order, work order line item, or work type.	
Location	Warehouse, site, van, or plant, usually where inventory is stored or used.	✓

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Object Name	Definition	Tab in Salesforce?
Maintenance Asset	Asset associated with a particular maintenance plan. The plan's work orders list the asset associated with it.	
Maintenance Plan	Plan for preventative maintenance on assets. Work orders are automatically generated for all maintenance visits.	✓
Mobile Settings Assignment	The assignment of a field service mobile settings configuration to a user profile.	
Operating Hours	Field service hours that you can define for service territories, service resources, and accounts.	✓
Product Consumed	A product from your inventory that was used to complete a work order or work order line item.	
Product Item	A portion of your inventory stored at a particular location. Every product item is linked to a product and a location.	✓
Product Item Transaction	Represents the restocking, consumption, or stock adjustment of a product item.	
Product Request	A request for a part or parts.	✓
Product Request Line Item	A subdivision of a product request, associated with a particular product.	✓
Product Required	A product that is required for the completion of a work order or work order line item.	
Product Transfer	The transfer of inventory from one location to another.	✓
Resource Absence	A time period in which a service resource is unavailable to work.	
Resource Preference	The designation of a service resource as preferred, required, or excluded on specific accounts or work orders.	
Return Order	The return or repair of inventory or products.	✓
Return Order Line Item	A subdivision of a return order.	
Service Appointment	An appointment to perform field service work for customers.	✓
Service Appointment Status	Corresponds to the Status field on service appointments.	
Service Crew	A group of service resources that can be assigned to field service work as a unit.	✓
Service Crew Member	A service resource that belongs to a service crew.	✓
Service Report	A customer-facing report summarizing the status of a service appointment, work order, or work order line item.	
Service Report Template	Templates for service reports.	

Object Name	Definition	Tab in Salesforce?
Service Resource	A user or crew who can perform field service work. You can assign service resources to service appointments and specify each resource's skills, service territory, and availability.	✓
Service Resource Capacity	The maximum number of scheduled hours or number of service appointments that a capacity-based service resource can complete within a specific time period.	
Service Resource Skill	A skill assigned to a service resource. You can specify skill level and expiration.	
Service Territory	A region in which field service can be performed. You can assign service resources to territories and create territory hierarchies.	✓
Service Territory Location	A location associated with a particular service territory.	
Service Territory Member	A service resource who is assigned to a particular service territory.	
Shipment	A shipment of inventory between locations.	✓
Skill Requirement	A skill that is required to complete a particular field service task. Skill requirements can be added to work types, work orders, and work order line items.	
Time Sheet	A record used to track a service resource's time and attendance.	✓
Time Sheet Entry	A period of time in which a service resource performs a specific function.	
Time Slot	A period of time on a specified day of the week during which field service work can be performed. Operating hours consist of one or more time slots.	
Work Order Status	Corresponds to the Status field on work orders.	
Work Order Line Item Status	Corresponds to the Status field on work order line items.	
Work Type	A template that helps you standardize your work orders.	✓

The following objects are available whether or not Field Service Lightning is enabled. You'll likely encounter them when completing field service tasks.

Object Name	Definition	Tab in Salesforce?
Asset	A purchased or installed product.	✓
Asset Relationship	A relationship between two assets that represents a replacement or upgrade.	
Contract Line Item	A subdivision of a service contract, typically representing a product covered by the service contract.	
Entitlement	Represents the level of support that a customer is entitled to.	✓

Object Name	Definition	Tab in Salesforce?
Product	A product or service that your business sells.	✓
Service Contract	Represents a service-level agreement such as a warranty or subscription.	✓
Skill	A capability needed to perform tasks.	✓
Work Order	A record that tracks work to be performed for customers. Work orders can have their own service appointments and work order line items.	✓
Work Order Line Item	A subdivision of a work order, often representing tasks to be completed.	

SEE ALSO:

[Set Up Field Service Lightning](#)

[Field Service Lightning Guidelines](#)

Linked Article Fields

A linked article is a Knowledge article that is attached to a work order, work order line item, or work type. Linked articles have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Article ID	The ID of the linked article record, which is created when an article is attached to a record.
Article Title	The title of the attached article.
Article Version	<p>The version of the article that is attached to the record. This field displays the title of the attached version, and links to the version. It is a required field on linked articles attached to work orders and work order line items.</p> <p>When you attach an article to a record, that version of the article stays associated with the record even if later versions are published. If needed, you can detach and reattach an article to a record to link the latest version.</p> <p>For example, if an article was entitled "How to Replace a Filter" when it was attached to a work order, this field displays that title and links to the attached version.</p>
Knowledge Article ID	Required. The ID of the article that is attached to the record.
Last Viewed	The date the article was last viewed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field	Description
Linked Object Type	Read only. The type of record that the article is attached to. For example, if the article is attached to a work order, this field displays "Work Order."
Linked Record ID	Required. The ID of the record that the article is attached to. For example, if the article is attached to a work order, this field displays the ID of the work order.
Record Type ID	The record type of the linked article. This field is populated only if record types are used.

SEE ALSO:

[Guidelines for Using Knowledge with Work Orders](#)

[Set Up Work Orders](#)

Location Fields

Locations, addresses, and associated locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Location

Locations in field service can be associated with products items to track inventory stored at the location. They have the following fields.

Field Name	Description
Close Date	Date the location closed or went out of service.
Construction End Date	Date construction ended at the location.
Construction Start Date	Date construction began at the location.
Description	A brief description of the location.
Driving Directions	Directions to the location.
Inventory Location	Indicates whether the location stores parts.  Note: This field must be selected if you want to associate the location with product items.
Location	The geographic location.
Location Level	The location's position in a location hierarchy. If the location has no parent or child locations, its level is 1. Locations that belong to a hierarchy have a level of 1 for the root location, 2 for the

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Field Name	Description
	child locations of the root location, 3 for their children, and so forth.
Location Name	Location name. For example, Service Van #4.
Location Type	Picklist of location types, which can be customized. The values are: <ul style="list-style-type: none"> • Warehouse (default) • Site • Van • Plant
Mobile Location	Indicates whether the location moves. For example, a truck or tool box.
Open Date	Date the location opened or came into service.
Owner Name	The location's owner or driver.
Parent Location	The location's parent location. For example, if vans are stored at a warehouse when not in service, the warehouse is the parent location.
Possession Date	The date the location was purchased.
Remodel End Date	Date remodel construction ended at the location.
Remodel Start Date	Date remodel construction ended at the location.
Root Location	(Read Only) The top-level location in the location's hierarchy.
Time Zone	Picklist of available time zones.
Vistor Address	Lookup to an account's or client's address.

Address

Addresses are mailing, billing, or home addresses, typically associated with a location. They have the following fields.

Field Name	Description
Address	Name for the address.
Address Type	Picklist of address types. The values are: <ul style="list-style-type: none"> • Mailing • Shipping • Billing • Home
Description	A brief description of the address.
Driving Directions	Directions to the address.

Field Name	Description
Location Type	The type of location associated with the address, which is automatically filled in. The values are: <ul style="list-style-type: none"> • Warehouse (default) • Site • Van • Plant
Parent	A lookup field to the parent address. For example, if the address is a billing address, its parents address might be the address of the associated warehouse.
Time Zone	Picklist of available time zones.

Associated Location

Associated locations represent a relationship between an account and a location. Multiple accounts can be associated with a location; for example, a shopping mall location might be related to several accounts. They have the following fields.

Field Name	Description
Account Name	The account associated with the location.
Active From	Date and time the location starts being associated with the account.
Active To	Date and time when the location is no longer associated with the account.
Associated Location Name	(Read Only) Auto-generated number for the association.
Location Name	A lookup field to the associated location.
Type	Picklist of address types. The values are: <ul style="list-style-type: none"> • Bill To • Ship To

SEE ALSO:

[Create Field Service Locations](#)

[Configure Field Service Location Settings](#)

[Set Up and Manage Your Inventory](#)

Maintenance Plan Fields

Maintenance plans and maintenance assets have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Maintenance Plan

Maintenance plans let you define how often maintenance visits occur and mass-generate work orders for future visits. They can be associated with accounts, work types, assets (creating records known as maintenance assets), locations, and service contracts.

Field Name	Description
Account	The associated account, which typically represents the customer receiving the maintenance service.
Auto-generate work orders	Turns on auto-generation of work order batches for a maintenance plan and prohibits the manual generation of work orders via the Generate Work Orders action. If this option is selected, a new batch of work orders is generated for the maintenance plan on the next suggested maintenance date* listed on each maintenance asset, or on the maintenance plan if no assets are included. If a Generation Horizon is specified, the date of generation is that many days earlier.
Contact	The associated contact.
Date of the first work order in the next batch	<p>The suggested date of service for the first work order (not the date the work order is created). This corresponds to the work order's Suggested Maintenance Date. You can use this field to enforce a delay before the first maintenance visit (for example, if monthly maintenance should begin one year after the purchase date).</p> <p>For example, if you want the first maintenance visit to take place on May 1, enter May 1. When you generate work orders, the earliest work order will list a Suggested Maintenance Date of May 1, and the dates on the later work orders will be based on the Generation Timeframe and Frequency settings.</p> <p> Important: Maintenance assets also list a Date of the first work order in the next batch, which is initially inherited from the maintenance plan. If the plan has maintenance assets, this date</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
	<p>auto-updates on the maintenance assets after each batch is generated, but doesn't update on the maintenance plan itself because batch timing is calculated at the maintenance asset level. If the plan doesn't have maintenance assets, this date auto-updates on the maintenance plan after each batch is generated.</p>
Description	A brief description of the plan.
End Date	The last day the maintenance plan is valid.
Frequency	(Required) Amount of time between the plan's work orders. The unit is specified in the Frequency Type field.
Frequency Type	<p>(Required) The unit of frequency:</p> <ul style="list-style-type: none"> • Days • Weeks • Months • Years <p>For example, to perform monthly maintenance visits you need a work order for each visit, so enter 1 in Frequency and select Months.</p>
Generate new batch upon completion	<p>If both this option and Auto-generate work orders are selected, a new batch of work orders isn't generated until the last work order generated from the maintenance plan is completed. A work order is considered completed when its status falls into one of the following status categories: Cannot Complete, Canceled, Completed, or Closed.</p> <p>If a maintenance plan covers multiple assets, work orders are generated per asset. If a maintenance asset's final work order is completed late, its work order generation is delayed, which may cause a staggered generation schedule between maintenance assets.</p>
Generation Horizon (Days)	<p>Moves up the timing of batch generation if Auto-generate work orders is selected. A generation horizon of 5 means the new batch of work orders is generated 5 days before the maintenance asset's (or maintenance plan's, if there are no assets) next suggested maintenance date*. The generation horizon must be a whole number.</p>
Generation Timeframe	(Required) How far in advance work orders are generated in each batch. The unit is specified in the Generation Timeframe Type field.
Generation Timeframe Type	<p>(Required) The generation timeframe unit:</p> <ul style="list-style-type: none"> • Days • Weeks

Field Name	Description
	<ul style="list-style-type: none"> Months Years <p>For example, to generate 3 months' worth of work orders at a time, enter 3 in Generation Timeframe and select Months.</p>
Location	Where the service takes place.
Maintenance Plan Number	(Read Only) An auto-assigned number that identifies the maintenance plan.
Maintenance Plan Title	A name for the maintenance plan.
Maintenance Window End (Days)	Days after the suggested service date on the work order that its service appointment can be scheduled.
Maintenance Window Start (Days)	<p>Days before the suggested service date on the work order that its service appointment can be scheduled.</p> <p>The maintenance window start and end fields affect the Earliest Start Permitted and Due Date fields on the maintenance plan's work orders' service appointments. For example, if you enter 3 for both the maintenance window start and end, the Earliest Start Permitted and the Due Date will be 3 days before and 3 days after, respectively, the Suggested Maintenance Date on each work order. If the maintenance window fields are left blank, the service appointment date fields list their work order's suggested maintenance date.</p>
Owner	Maintenance plan owner.
Service Contract	The service contract associated with the maintenance plan. The service contract can't be updated if any child maintenance asset is associated with a contract line item from the service contract.
Start Date	The first day the maintenance plan is valid.
Work Order Generation Status	(Read Only) Indicates whether the work order generation is in progress or complete. You can generate only one batch at a time.
Work Type	The associated work type. Work orders generated from the maintenance plan inherit its work type's duration, required skills and products, and linked articles. Maintenance assets covered by the plan use the same work type, though you can update them to use a different one.

Maintenance Asset

A maintenance asset is a part or product covered by the maintenance plan. The Assets related list on the maintenance plan lists all covered assets. An asset can be covered by multiple maintenance plans.

Field Name	Description
Asset	Asset associated with the maintenance plan.
Contract Line Item	Contract line item associated with the maintenance asset. This field can only list a contract line item that is associated with the asset, and whose parent service contract is associated with the parent maintenance plan.
Date of the first work order in the next batch	The suggested date of service for the first work order (not the date the work order is created). This corresponds to the work order's Suggested Maintenance Date. If left blank when the maintenance asset is created, this field inherits its initial value from the related maintenance plan. It auto-updates after each batch is generated.
Maintenance Asset Number	(Read Only) An auto-assigned number that identifies the maintenance asset.
Maintenance Plan	Maintenance plan associated with the maintenance asset.
Work Type	Work type associated with the maintenance asset. Work orders generated from the maintenance plan inherit its work type's duration, required skills and products, and linked articles. Maintenance assets covered by the plan use the same work type, though you can update them to use a different one.

*The field label for the next suggested maintenance date on maintenance plans and maintenance assets is Date of the first work order in the next batch.

SEE ALSO:

[Create Maintenance Plans](#)

[Guidelines for Generating Work Orders from a Maintenance Plan](#)

Operating Hours Fields

Operating hours and time slots have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Operating Hours

Operating hours can be assigned to service territories, service territory members, and accounts to indicate when they are available for field service work. Create operating hours via the Operating Hours tab.

Field Name	Description
Description	The description of the operating hours. Add any details that aren't included in the name.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Name	The name of the operating hours. For example: Summer Hours, Winter Hours, or Peak Season Hours.
Time Zone	The time zone that the operating hours fall within.

Time Slot

Time slots represent a time period within a day when field service work can be completed. After you create operating hours, create time slots for each day via the Time Slots related list.

Field Name	Description
Day of Week	The day of the week when the time slot takes place.
End Time	The time when the time slot ends.
Name	The name of the time slot. The name is auto-populated to a day and time format—for example, Monday 9:00 AM - 10:00 PM—but you can manually update it if you wish.
Operating Hours	The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list.
Start Time	The time when the time slot starts.
Type	The type of time slot. Possible values are Normal and Extended. You may choose to use Extended to represent overtime shifts.

SEE ALSO:

[Operating Hours Considerations](#)

[Create Operating Hours](#)

Part Request and Transfer Fields

Product requests, product request line items, product transfers, and shipments have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

Product Request

Product requests represent a part or parts ordered. They have the following fields.

Field Name	Description
Account	The account associated with the product request.
Case	The case associated with the product request.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Currency ISO Code	Three-letter currency code. Available only if the multicurrency feature is enabled.
Description	Notes or context about the request.
Destination Location	Where the product is delivered.
Need By Date	Date the product must be delivered by.
Owner	The owner of the product request.
Product Request Number	(Read Only) An auto-generated number that identifies the product request.
Shipment Type	The type of shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Rush • Overnight • Next Business Day • Pick Up
Ship To Address	The physical address where the product is delivered. For example, the mailing address of the warehouse that is requesting the product.
Source Location	Where the product is at the time of the request.
Status	The status of the shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Draft: Finalizing the product request details. • Submitted: The product request is ready for processing. • Received: The department in charge of fulfilling the request is working on it.
Work Order	The work order associated with the product request.
Work Order Line Item	The work order line item associated with the product request.

Product Request Line Item

Product request line items are subdivisions of a product request. Each line item is associated with a specific product being requested. They have the following fields.

Field Name	Description
Account	The account associated with the product request line item.
Case	The case associated with the product request line item.
Description	Notes and context about the request.

Field Name	Description
Destination Location	Where the product is delivered.
Need By Date	Date the product must be delivered by.
Parent	The product request that the line item belongs to.
Product	The product being requested.
Product Request Line Item Number	(Read Only) An auto-assigned number that identifies the product request line item.
Quantity Requested	The amount requested.
Quantity Unit Of Measure	Units of the requested product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Shipment Type	The type of shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Rush • Overnight • Next Business Day • Pick Up
Ship To Address	The physical address where the product is delivered.
Source Location	Where the product is at time of the request.
Status	The status of the shipment. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Draft • Submitted • Received
Work Order	The work order associated with the product request line item.
Work Order Line Item	The work order line item associated with the product request line item.

Product Transfer

Product transfers track the transfer of product items between inventory locations. They have the following fields.

Field Name	Description
Description	Notes or context about the transfer.
Destination Location	The location where the product is to be delivered.
Expected Pickup Date	Date the product is expected to be picked up.

Field Name	Description
Owner	Owner of the product transfer.
Product Name	The product associated with the product transfer. If the product is being transferred from outside your inventory--for example, if it's being ordered from a manufacturer--enter a product name. Otherwise, we recommend entering a source product item.
Product Request	The product request associated with the product transfer. Not all transfers are created in response to a product request.
Product Request Line Item	The product request line item associated with the product transfer. Create a separate transfer for each line item on a product request.
Quantity Received	Amount of product received at the destination location.
Quantity Sent	Amount of product sent from the source location.
Quantity Unit Of Measure	The units of the product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Received	Indicates that the product was received. To mark a product transfer received, you need permission to update product items. Once you mark a product item received, you can't undo it.  Note: To find out what happens when a product transfer is marked received, see How Product Transfers Work .
Received By	The contact who received the product at the destination location.
Return Order	The return order associated with the product transfer.
Return Order Line Item	The return order line item associated with the product transfer.
Shipment	The shipment related to the product transfer.
Shipment Expected Delivery Date	The expected date of delivery, inherited from the related shipment.
Shipment Status	The shipment status, inherited from the related shipment. It includes the following values, which can be customized: <ul style="list-style-type: none"> • Shipped • Delivered
Shipment Tracking Number	The shipment tracking number, inherited from the related shipment.
Shipment Tracking URL	The shipment tracking URL, inherited from the related shipment.
Source Location	The location where the product is coming from.
Source Product Item	The product item representing the stock at the source location. Enter a source product item if the product is being transferred from a location within your inventory, such as a warehouse. Specifying

Field Name	Description
	<p>a source product item on a product transfer automatically updates the quantity at the source location to reflect the transfer.</p> <p>If the product is being transferred from outside your inventory—for example, if it's being ordered from a manufacturer—enter a product name instead.</p>
Status	<p>Status of the product transfer. It includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Ready for Pickup • Completed

Shipment

A shipment tracks a product item while it is in transit. They have the following fields.

Field Name	Description
Actual Delivery Date	Date the product was delivered.
Delivered To	The person or entity the product was delivered too.
Description	Notes or context about the shipment.
Destination Location	The place the product is to be delivered.
Expected Delivered Date	Date the product is expected to be delivered.
Owner Name	Owner of the shipment.
Ship From Address	The place the product is coming from.
Shipment Number	(Read Only) An auto-assigned number that identifies the shipment.
Shipping Provider	The company or person making the transfer.
Ship To Address	The address the product is to be delivered.
Source Location	The address the product is shipped from.
Status	<p>The status of the shipment. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Shipped—The product is in transit. • Delivered—The product is at the destination location.
Tracking Number	Tracking number for the shipment.

Field Name	Description
Tracking URL	URL of website used for tracking the shipment.

SEE ALSO:

[Parts and Inventory Fields](#)

[Location Fields](#)

[Return Order Fields](#)

[Set Up and Manage Your Inventory](#)

Parts and Inventory Fields

Product items, product item transactions, products required, and products consumed have the following fields. Some fields might not be visible or editable depending on your page layout and field-level security settings.

Product Item

Product items track the quantity of a particular product at a location. They have the following fields.

Field Name	Description
Location	Location associated with the product item. This usually indicates where the product item is stored.
Owner	The product item's owner.
Product Item Number	(Read Only) Auto-generated number identifying the product item.
Product Name	Product associated with the product item.
Quantity On Hand	The quantity at the location. If you want to add a serial number, this value must be 1.
Quantity Unit of Measure	Units of the product item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Serial Number	A unique number for identification purposes. If you want to enter a serial number, the Quantity on Hand must be 1.  Tip: To learn more about the pros and cons of assigning serial numbers to product items, see Create Parts .

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Product Item Transaction

Product item transactions describe actions performed on a product item. They're auto-generated records that help you track when a product item is replenished, consumed, or adjusted. They have the following fields.

Field Name	Description
Description	A description of the transaction. The description is blank when the transaction record is created, but can be updated.
Product Item	The associated product item.
Product Item Transaction Number	(Read Only) Auto-generated number identifying the product item transaction.
Quantity	The quantity of the product item involved in the transaction. If inventory was consumed, the quantity is negative.
Related Record	(Read Only) The product consumed or product transfer related to the action. If the action wasn't related to consumption or transfer, the related record is blank.
Transaction Type	The action that the transaction tracks. <ul style="list-style-type: none"> • Replenished: When a part is stocked or restocked at a location. A Replenished transaction is created when a product item is created or a transfer is marked received. • Consumed: When parts are consumed to complete a work order. A Consumed transaction is created when a record is added to the Products Consumed related list on a work order or work order line item. • Adjusted: When there is a discrepancy or a change in consumption. An Adjusted transaction is created when a product item's Quantity on Hand is edited, a product consumed is updated or delete, or a product transfer is deleted. • Transferred: When parts are transferred from one location to another.

Product Required

Products required are products that are needed to complete a work order or work order line item. You can add products required to work orders, work order line items, and work types. They have the following fields.

Field Name	Description
Parent Record	Associated work order or work order line item.
Parent Record Type	Indicates whether the parent record is a work order or a work order line item.
Product Required	Name of the required product.
Product Required Number	Auto-generated number identifying the product required.

Field Name	Description
Quantity Required	Amount required of the product.
Quantity Unit of Measure	Units of the required product; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.

Product Consumed

Products consumed are items from your inventory that were used to complete a work order or work order line item. They have the following fields.

 **Note:** To create or delete products consumed, you need permission to create product items.

Field Name	Description
Description	Notes and context about the product consumed.
Price Book Entry	Price book associated with the product consumed. If the work order and the product item's associated product are related to the same price book, the Price Book Entry auto-populates based on the product item.
Product	Product associated with the product consumed.
Product Consumed Number	(Read Only) Auto-generated number identifying the product consumed.
Product Item	Product item associated with the product consumed. Creating a product consumed record subtracts the quantity consumed from the linked product item's quantity.
Quantity Consumed	The quantity of products consumed.
Quantity Unit of Measure	Units of the consumed item; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Unit Price	The price per unit of the product consumed.
Work Order	Work order associated with the product consumed.
Work Order Line Item	Work order line item associated with the product consumed.

SEE ALSO:

[Location Fields](#)

[Part Request and Transfer Fields](#)

[Return Order Fields](#)

[Set Up and Manage Your Inventory](#)

Return Order Fields

Return orders and return order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Return Order

Return orders track the return or repair of products and inventory.

Field Name	Description
Account	The account associated with the return order.
Case	The case associated with the return order.
Contact	The contact associated with the return order.
Description	Notes or context about the return order.
Destination Location	The location where the items are being returned to. For example, if the return order tracks the return of products from a technician's van to a warehouse, the warehouse is the destination location.
Expected Arrival Date	The date when the items are expected to arrive at the destination location.
Order	The order associated with the return order. When you associated a return order with an order, you can associate the return order's line items with order products.
Owner	The owner of the return order.
Product Request	The product request associated with the return order. When you associated a return order with a product request, you can associate the return order's line items with the product request's line items. A return order might be related to a product request if the return order tracks the return of unused products or products to be repaired or replaced. For example, a technician creates a product request for three motors to prepare for a field visit. If the technician finds that only two motors are needed, they can create a return order to return the third to the original location, and list the product request in this field.
Return Order Number	(Read only) Auto-generated number identifying the return order.
Returned By	The user returning the items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Ship From Address	The return shipping address. This address tracks the location of the items at the start of the return or repair. For example, if a customer is returning an item, the Ship From address is the customer's address.
Shipment Type	The type of shipment associated with the return order. Available values are: <ul style="list-style-type: none"> • Standard (default value) • Rush • Overnight • Next Business Day • Pickup
Source Location	The items' location at the start of the return or repair. For example, if the return order tracks the return of products from a technician's service vehicle to a warehouse, the service vehicle is the source location.
Status	The status of the return order. Available values are: <ul style="list-style-type: none"> • Draft • Submitted • Approved • Canceled • Closed

Return Order Line Item

Field Name	Description
Asset	The asset associated with the return order line item. One or more of the following fields must be filled out: Asset, Order Product, Product, Product Item, and Product Request Line Item.
Description	Notes or context about the return order line item.
Destination Location	The location where the items are being returned to. For example, if the return order tracks the return of products from a technician's van to a warehouse, the warehouse is the destination location.
Order Product	The order product associated with the return order line item. One or more of the following fields must be filled out: Asset, Order Product, Product, Product Item, and Product Request Line Item.
Processing Plan	Indicates the preferred fate of the items following their return. Available values are: <ul style="list-style-type: none"> • Repair—Repair the items and return them to the owner

Field Name	Description
Product	<ul style="list-style-type: none"> • Discard—Discard the items • Salvage—Salvage the items' working components • Restock—Return the items to your inventory
Product Item	The product item representing the location of the product at the start of the return. One or more of the following fields must be filled out: Asset, Order Product, Product, Product Item, and Product Request Line Item.
Product Request Line Item	The product item associated with the return order line item. One or more of the following fields must be filled out: Asset, Order Product, Product, Product Item, and Product Request Line Item.
Product Request Line Item	The product request line item associated with the return order line item. One or more of the following fields must be filled out: Asset, Order Product, Product, Product Item, and Product Request Line Item.
Quantity Returned	The quantity of items being returned. If multiple types of products are being returned, track each product in a different return order line item.
Quantity Unit of Measure	Units of the returned items; for example, kilograms or liters. Quantity Unit of Measure picklist values are inherited from the Quantity Unit of Measure field on products.
Reason for Return	<p>The reason the items are being returned. Available values are:</p> <ul style="list-style-type: none"> • Damaged • Defective • Duplicate Order • Wrong Item • Wrong Quantity • Not Satisfied • Outdated • Other
Repayment Method	<p>The method by which the customer or owner is reimbursed for the items being returned. Available values are:</p> <ul style="list-style-type: none"> • Replace—The items are replaced • Refund—The items are returned and the owner is refunded • Credit—The items are returned and the owner receives credit for them • Return—The items are returned to the owner (for example, following their repair)
Return Order	The return order that the return order line item belongs to.

Field Name	Description
Return Order Line Item Number	(Read only) Auto-generated number that identifies the return order line item.
Source Location	The items' location at the start of the return or repair. For example, if the return order tracks the return of products from a technician's service vehicle to a warehouse, the service vehicle is the source location.

SEE ALSO:

[Create Return Orders](#)

[Guidelines for Creating Return Orders](#)

Service Appointment Fields

Service appointments have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Account	(Read only) The account associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent. Otherwise, it remains blank.
Actual Duration (Minutes)	The number of minutes that it took the resource to complete the appointment after arriving at the address. When values are first added to the Actual Start and Actual End fields, the Actual Duration is automatically populated to list the difference between the Actual Start and Actual End. If the Actual Start and Actual End fields are subsequently updated, the Actual Duration field doesn't re-update, but you can manually update it.
Actual End	The actual date and time the appointment ended.
Actual Start	The actual date and time the appointment started.
Address	The address where the appointment is taking place. The address is inherited from the parent record if the parent record is a work order or work order line item.
Appointment Number	An auto-assigned number that identifies the appointment.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Arrival Window End	The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
Arrival Window Start	The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You may choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
Contact	The contact associated with the appointment. If the parent record is a work order or work order line item, this field's value is inherited from the parent.
Description	The description of the appointment.
Due Date	The date by which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Duration	The estimated length of the appointment. If the parent record is work order or work order line item, the appointment inherits its parent's duration, but it can be manually updated. The duration is in minutes or hours based on the value selected in the Duration Type field.
Duration Type	The unit of the duration: Minutes or Hours.
Earliest Start Permitted	The date after which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Parent Record	The parent record associated with the appointment. The parent record can't be updated after the service appointment is created.
Parent Record Status Category	(Read only) The Status Category of the parent record. If the parent record is a work order or work order line item, this field is populated; otherwise, it remains blank.
Parent Record Type	(Read only) The type of parent record: Account, Asset, Opportunity, Work Order, or Work Order Line Item.
Scheduled End	The time at which the appointment is scheduled to end. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource. Scheduled End – Scheduled Start = Estimated Duration.

Field Name	Description
Scheduled Start	The time at which the appointment is scheduled to start. If you are using the Field Service Lightning managed package with the scheduling optimizer, this field is populated once the appointment is assigned to a resource.
Service Note	Add notes such as an appointment summary or recommendations for future work. Depending on your settings, these notes might appear on a customer-facing service report.
Service Territory	The service territory associated with the appointment. If the parent record is a work order or work order line item, the appointment inherits its parent's service territory.
Status	<p>The status of the appointment. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • None—Default value. • Not Scheduled—The service appointment isn't scheduled. • Scheduled—The service appointment is scheduled. • Dispatched—The service resource is in route. • In Progress—The service resource started work. • Completed—The service resource completed work. • Canceled—The service appointment has been canceled. • Missed—The service resource didn't make it to the location. • Running Long—The service resource started the job but didn't complete it by the scheduled end time. • Late—The service resource didn't start the job by the scheduled start time.
Status Category	<p>The category that each Status value falls into. The Status Category field has seven values which are identical to the default Status values.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Customer Absent value, you may decide that it belongs in the Missed category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Subject	A short phrase describing the appointment.

Field Name	Description
Work Type	The work type associated with the service appointment.

SEE ALSO:

[Create Service Appointments](#)

[Guidelines for Using Service Appointments](#)

Service Crew Fields

Service crews and service crew members have the following fields. Depending on your page layout and field-level security settings, you may not be able to view or update some of them.

Service Crew

Service crews are groups of users who can be assigned to a service appointment as a unit.

Field Name	Description
Crew Size	The number of members on the crew. This field is manual, so it doesn't auto-update when you add or remove members.
Name	The name of the service crew. For example, Repair Crew.
Owner	By default, the person who created the service crew.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Service Crew Member

Service crew members are service resources who belong to a service crew. Add members to a service crew from the Service Crew Members related list on the crew record.

Field Name	Description
End Date	The last day that the service resource belongs to the crew. You can use this field to track employment dates for contractors.
Leader	Indicates that the member is the crew leader.
Name	The name of the crew member. Depending on your preference, you can enter the service resource's name or their role in the crew.
Service Crew	The crew that the service resource belongs to.
Service Resource	The service resource that belongs to the crew.

Field Name	Description
Start Date	Required. The day the service resource joins the crew.

SEE ALSO:

[Create Service Crews](#)

[Guidelines for Setting Up Your Workforce](#)

[Create Service Resources](#)

Service Report Fields

Service reports and digital signatures on service reports have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service Report

Service reports display fields from related objects, including service appointments, work orders, and work order line items. In addition, the Service Report object comes with the following fields.

Field Name	Description
Parent ID	The ID of the record that the service report is summarizing. For example, if you click Create Service Report on a service appointment, this field lists the service appointment's record ID.
Service Report Name	The name of the service report.
Service Report Template	The template used to create the service report.  Note: If the person creating the service report doesn't have Read access to objects or fields in the service report template, those fields aren't visible in the report they create.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Digital Signature

Digital Signatures are signatures captured on service reports. For example, technicians can collect signatures from customers, technicians, or anyone else involved in field service work.

Field Name	Description
Date Signed	The date of the signing.
Parent Record	The service appointment, work order, or work order line item that the service report belongs to.
Place Signed	The place where the service report was signed.

Field Name	Description
Signature Image	The image of the signature.
Signature Number	An auto-generated number identifying the signature.
Signature Type	<p>The role of the person signing. It comes with one value, Default. Service reports can have one signature per type, so your admin needs to create additional signature types in Setup.</p> <p>Create at least one value for every role that might need to sign a service report. For example, Technician, Customer, Supervisor, or Supplier. If you want some service reports to be signed by multiple people in one role—for example, if all technicians present at an appointment should sign—create numbered types: Technician 1, Technician 2, and so forth.</p>
Signed By	The name of the person signing.

SEE ALSO:

[Create Service Report Templates](#)

[Create Service Reports](#)

[Guidelines for Customizing Service Report Templates](#)

[Guidelines for Using Signatures on Service Reports](#)

Service Resource Fields

Service resources and their related objects have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service Resource

Service resources represent individual users or groups of users (known as service crews) who can complete field service work.

Field Name	Description
Active	When selected, this option means that the resource can be assigned to work orders. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
Capacity-Based	<p>Capacity-based resources are limited to a certain number of hours or appointments in a specified time period.</p> <p> Tip: The Capacities related list shows a resource's capacity.</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Description	The description of the resource.
Include in Scheduling Optimization	When selected, this option means that the service scheduling optimizer can assign this resource to work orders during the optimization process. Use only if the Field Service Lightning managed package is installed. Only users with the Field Service Scheduling permission set license can be included in scheduling optimization.
Location	The location associated with the service resource. For example, a service vehicle driven by the service resource.
Name	The resource's name. This might be the name or title of the associated user or crew.
Resource Type	Indicates whether a resource is a technician, dispatcher, or crew. Resources who are dispatchers can't be capacity-based or included in scheduling optimization. Only users with the Field Service Dispatcher permission set license can be dispatchers.  Note: You can't add additional resource types.
Service Crew	The associated service crew. If the service resource represents a crew, select the crew.  Note: This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your service resource page layouts.
User	The associated user. If the service resource represents a crew instead of a single user, leave this field blank.

Resource Absence

Resource absences are periods of time in which a service resource isn't available to work.

Field Name	Description
Absence Number	(Read only) An auto-generated number identifying the absence.
Absence Type	The type of absence: Meeting, Training, Medical, or Vacation. You can add custom values if needed.
Address	The address associated with the absence.
Description	The description of the absence.
End Time	The date and time when the absence ends.
Resource Name	The absent service resource.
Start Time	The date and time when the absence begins.

Resource Capacity

A service resource's capacity indicates how much work the resource can perform in a specified time period.

Field Name	Description
End Date	The date the capacity ends; for example, the end date of a contract.
Name	(Read only) An auto-generated number identifying the capacity record.
Hours per Time Period	The number of hours that the resource can work per time period. You must fill out this field, the Work Items per Time Period field, or both.
Service Resource	The associated resource.
Start Date	The date the capacity goes into effect.
Time Period	Days, Hours, or Months. For example, if a resource can work 80 hours per month, the capacity's Time Period would be Month and Hours per Time Period would be 80.
Work Items per Time Period	The total number of service appointments that the resource can complete per time period. You must fill out this field, the Hours per Time Period field, or both.

Assigned Resource

Assigned resources are service resources who are assigned to a service appointment. They appear in the Assigned Resources related list on service appointments. Assign a service appointment to a service crew by creating an assigned resource record that is linked to the service resource record representing the crew.

Field Name	Description
Actual Travel Time (Minutes)	The actual travel time in minutes to the work site.
Assigned Resource Number	An auto-generated number identifying the assigned resource.
Estimated Travel Time (Minutes)	The estimated travel time in minutes to the work site.  Note: If the resource represents a crew, you can't track individual crew members' travel time unless you create an assigned resource record for each crew member.
Service Appointment	The related service appointment.
Service Crew	The service crew assigned to the appointment. Typically, appointments are assigned to crews by creating an assigned resource record that links to the service crew record. If you're using that approach, you can leave the Service Crew field blank. If you want to assign an appointment to crew members individually so you can track each member's travel time, create an assigned

Field Name	Description
	resource record for each crew member that has both the User and Service Crew fields completed. This field is hidden for all users by default. To use it, update its field-level security settings in Setup and add it to your assigned resource page layouts.
Service Resource	The service resource assigned to the appointment.

Resource Preference

Resource preferences indicate which service resources should be assigned to field service work. You can designate certain service resources as preferred, required, or excluded on specific accounts or work orders. Work orders inherit their associated account's resource preferences.

Field Name	Description
Preference Type	<ul style="list-style-type: none"> • Preferred: Indicates that the customer would like their field service work assigned to the resource • Required: Indicates that the resource must be assigned to the customer's field service work • Excluded: Indicates that the customer does not want their field service work assigned to the resource <p>Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related work order's resource preferences.</p>
Related Record	The work order or account with the resource preference.
Resource Preference Number	An auto-generated number identifying the resource preference.
Service Resource	The service resource that is preferred, required, or excluded.

SEE ALSO:

[Create Service Resources](#)

[Guidelines for Setting Up Your Workforce](#)

Service Territory Fields

Service territories, service territory members, and service territory locations have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Service Territory

Service territories represent regions in which field service work can be performed.

Field Name	Description
Active	Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to work orders, work order line items, or service appointments.
Address	An address to associate with the territory. You may want to list the address of the territory's headquarters.
Description	The description of the territory.
Name	The name of the territory.
Operating Hours	The territory's operating hours, which indicate when service appointments within the territory should occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the service territory member record.
Parent Territory	The territory's parent service territory, if it has one. For example, a Northern California territory can have a State of California territory as its parent.
Top-Level Territory	(Read only) The top-level territory in a hierarchy of service territories. Depending on where a territory lies in the hierarchy, its top-level territory might be the same as its parent.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Service Territory Member

Service territory members are service resources who are available to work in the service territory.

Field Name	Description
Address	The member's address. You may want to list the related service resource's address in this field.

Field Name	Description
End Date	The date when the service resource is no longer a member of the territory. If the resource will be working in the territory for the foreseeable future, leave this field blank. This field is mainly useful for indicating when a temporary relocation ends.
Member Number	(Read only) An auto-generated number identifying the service territory member.
Operating Hours	The member's operating hours, which are inherited from the service territory.
Service Resource	The service resource assigned to the service territory.
Service Territory	The service territory that the service resource is assigned to.
Start Date	The date when the service resource becomes a member of the service territory.
Territory Type	<p>Primary, Secondary, or Relocation.</p> <ul style="list-style-type: none"> The primary territory is typically the territory where the resource works most often—for example, near their home base. Service resources can only have one primary territory. Secondary territories are territories where the resource can be assigned to appointments if needed. Service resources can have multiple secondary territories. Relocation territories represent temporary moves for service resources. If you're using the Field Service Lightning managed package with the scheduling optimizer, resources with relocation territories are always assigned to services within their relocation territories during the specified relocation dates; if they don't have a relocation territory, the primary territories are favored over the secondary. <p>For example, a service resource might have the following territories:</p> <ul style="list-style-type: none"> Primary territory: West Chicago Secondary territories: <ul style="list-style-type: none"> East Chicago South Chicago Relocation territory: Manhattan, for a three-month period

Service Territory Location

Service territory locations represent locations that belong to a service territory, such as a warehouse located inside a territory.

Field Name	Description
Location	The related location.

Field Name	Description
Service Territory	The related service territory.
Service Territory Location Number	An auto-generated number identifying the territory location.

SEE ALSO:

[Create Service Territories](#)

[Guidelines for Setting Up Service Territories](#)

Skill Fields for Field Service

Skills represent certifications and areas of expertise in your field service workforce. Skills, service resource skills, and skill requirements have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Skill

Skills represent a certification or area of expertise. They are created in Setup.

Field Name	Description
Name	The name of the skill.
Description	The description of the skill.
Developer Name	The unique name of the skill in the API.

EDITIONS

Available in: Salesforce Classic

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

 **Note:** When you create a skill, leave the Assign Users and Assign Profiles sections blank. They are specific to Live Agent, which also uses skills.

Service Resource Skill

Service resource skills are skills that are assigned to a service resource. They appear in the Skills related list on service resource detail pages.

Field Name	Description
End Date	The date when the skill expires. For example, if a resource must be re-certified after six months, the end date would be the date their certification expires.
Service Resource	The resource who possesses the skill.
Skill	The skill the resource possesses.
Skill Level	The resource's skill level. Skill level can range from zero to 99.99. For tips on how to define skill level, see Configure Skill Settings on page 764.

Field Name	Description
Start Date	The date when the resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.

Skill Requirement

Skill requirements are skills that a service resource needs to complete a task. They appear in the Skill Requirements related list on work type, work order, and work order line item detail pages.

Field Name	Description
Related Record	The work order, work order line item, or work type that the skill is required on.
Skill	The required skill.
Skill Level	The required skill level. Skill level can range from zero to 99.99.

SEE ALSO:

[Create Skills](#)

[Add Required Skills to Work Orders or Work Types](#)

Time Sheet Fields

Time sheets and time sheet entries have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Time Sheet

Time sheets relate service resources with their time and attendance.

Field Name	Description
Created By	(Read Only) User who created the time sheet.
Created Date	(Read Only) Date the time sheet was created.
Currency ISO Code	Three-letter currency code.
Last Modified By	(Read Only) User who last modified the time sheet.
Last Modified Date	(Read Only) Date the time sheet was last modified.
Name	Time sheet name.
Owner	Time sheet owner.
Service Resource	Service resource associated with the time sheet.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
Status	The status of the time sheet. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None • New • Submitted • Approved
Time Sheet End Date	The last day the time sheet covers.
Time Sheet Entry Count	(Read Only) The number of related time sheet entries.
Time Sheet Start Date	The first day the time sheet covers.

Time Sheet Entry

Time sheet entries track the continual time a resource performs a specific function.

Field Name	Description
Created By	(Read Only) User who created the time sheet entry.
Created Date	(Read Only) Date the time sheet entry was created.
Currency ISO Code	Three-letter currency code. Time sheet entries inherit their time sheet's currency code. Updates to a time sheet's currency code aren't reflected in existing time sheet entries' currency code.
Description	A text box for notes on how the time was spent. For example, "This service took longer than normal because the machine was jammed."
Duration (in Minutes)	(Read Only) Minutes recorded on the time sheet entry.
End Time	The date and time the activity finished.
Last Modified By	(Read Only) User who last modified the time sheet.
Last Modified Date	(Read Only) Date the time sheet was last modified.
Name	Time sheet entry name.
Start Time	The date and time the activity began.
Status	The status of the time sheet entry. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None • New • Submitted • Approved

Field Name	Description
Subject	Activity performed; for example, repair, lunch, or travel.
Time Sheet	(Read Only) Related time sheet.
Type	The type of work performed. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • None • Direct • Indirect
Work Order	The work order related to the time sheet entry. Work orders are searchable by their content.
Work Order Line Item	The work order line item related to the time sheet entry. Work order line items are searchable by their content.

SEE ALSO:

[Set Up Time Tracking](#)

Work Order Fields

Work orders have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Account	The account associated with the work order.
Address	The compound form of the address where the work order is completed. The work order's service appointments and line items inherit its address, though the address on line items can be updated.
Asset	The asset associated with the work order.
Business Hours	The business hours associated with the work order.
Case	The case associated with the work order.
City	The city where the work order is completed. Maximum length is 40 characters.
Contact	The contact associated with the work order.
Country	The country where the work order is completed. Maximum length is 80 characters.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field	Description
Currency ISO Code	Three-letter currency code. Available only if the multicurrency feature is enabled.
Description	The description of the work order. We recommend describing the steps a user must complete to mark the work order Completed.
Discount	(Read Only) The weighted average of the discounts on all line items on the work order. It can be any positive number up to 100.
Duration	The estimated time required to complete the work order. Specify the duration unit in the Duration Type field.  Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the work order is completed. This field is blank unless you set up automation to configure it. For a sample workflow rule that configures the Start Date field (a similar field), see below.
Entitlement	The entitlement associated with the work order.
Entitlement Process End Time	The time the work order exits an entitlement process. If an entitlement process applies to a work order, this field appears.
Entitlement Process Start Time	The time the work order entered an entitlement process. If an entitlement process applies to a work order, this field appears.
Generated from maintenance plan	(Read Only) Indicates that the work order was generated from a maintenance plan, rather than manually created.  Note: This option is deselected for work orders that were generated from maintenance plans before Summer '18.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Grand Total	(Read Only) The total price of the work order with tax added.
Is Closed	Indicates whether the work order is closed.  Tip: Use this field to report on closed versus open work orders.
Last Modified Date	The date when the work order was last modified.
Last Viewed Date	The date when the work order was last viewed.

Field	Description
Latitude	Used with Longitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
Line Items	(Read Only) The number of work order line items on the work order.
Location	The location associated with the work order. For example, a work site.
Longitude	Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
Maintenance Plan	The maintenance plan associated with the work order. When the work order is auto-generated from a maintenance plan, this field automatically lists the related plan.
Milestone Status	A milestone is a step in an entitlement process. It can have one of three statuses: Compliant, Open Violation, and Closed Violation. If an entitlement process applies to a work order, this field appears. To learn more, see Milestone Statuses .
Milestone Status Icon	An icon that corresponds to the milestone status. <ul style="list-style-type: none"> •  Compliant •  Open Violation •  Closed Violation
Minimum Crew Size	The minimum crew size allowed for a crew assigned to the work order. If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a work order's minimum crew size requirement.
Owner	The work order's assigned owner.
Parent Work Order	The work order's parent work order, if it has one.  Tip: View, create, and delete a work order's child work orders in the Child Work Orders related list.
Postal Code	The postal code where the work order is completed. Maximum length is 20 characters.
Price Book	The price book associated with the work order. Adding a price book to the work order lets you assign different price book entries (products) to the work order's line items. This field is only available if products are enabled.

Field	Description
Priority	<p>The priority of the work order. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • Low • Medium • High • Critical
Recommended Crew Size	The recommended number of people on the service crew assigned to the work order.
Record Type	The record type associated with the work type.
Return Order	The return order associated with the work order.
Return Order Line Item	The return order line item associated with the work order.
Root Work Order	(Read Only) The top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root might be the same as its parent.
Service Appointment Count	The number of service appointments on the work order.
Service Contract	The service contract associated with the work order.
Service Report Template	<p>The service report template that the work order's service reports should use.</p> <p>If you don't specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template.</p> <p> Note: This field stays blank unless you update it on the work order. So to find out which template the work order's service reports will use, check its work type.</p>
Service Territory	The service territory where the work order is taking place.
Start Date	The date when the work order goes into effect. This field is blank unless you set up automation to populate it. For a sample workflow rule that configures this field, see below.
State	The state where the work order is completed. Maximum length is 80 characters.
Status	<p>The status of the work order. The picklist includes the following values, which can be customized:</p> <ul style="list-style-type: none"> • New—Work order was created, but there hasn't yet been any activity. • In Progress—Work has begun. • On Hold—Work is paused.

Field	Description
	<ul style="list-style-type: none"> • Completed—Work is complete. • Cannot Complete—Work could not be completed. • Closed—All work and associated activity is complete. • Canceled—Work is canceled, typically before any work began. <p>Changing a work order's status does not affect the status of its work order line items or associated service appointments.</p>
Status Category	<p>The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Stopped	Indicates the the milestone countdown has been paused.
Stopped Since	The time the milestone countdown was paused.
Street	The street number and name where the work order is completed.
Subject	The subject of the work order. Try to describe the nature and purpose of the job to be completed. For example, "Annual on-site well maintenance." The maximum length is 255 characters.
Subtotal	(Read Only) The total of the work order line items' subtotals before discounts and taxes are applied.
Suggested Maintenance Date	The suggested date that the work order is completed. When the work order is generated from a maintenance plan, this field is automatically populated based on the maintenance plan's settings.
Tax	The total tax on the work order. For example, in a work order whose total price is \$100, enter \$10 to apply a 10 percent tax. You can enter a number with or without the currency symbol and you can use up to two decimal places.
Total Price	(Read Only) The total of the work order line items' price after discounts but before tax is added.
Work Order Number	An auto-generated number that identifies the work order.

Field	Description
Work Type	The work type associated with the work order. When a work type is selected, the work order automatically inherits the work type's Duration, Duration Type, and required skills.

 **Example:** The Start Date and End Date fields are blank by default, but you can set up workflow rules to configure them. The following rule populates the Start Date field with the current date and time when the Status field is changed to In Progress:

1. Create a workflow rule on the Work Order object:
 - Under Evaluation criteria, select **Created**.
 - Under Rule Criteria, enter *Work Order: Status EQUALS In Progress*.
2. Add a New Field Update workflow action:
 - Under Field to Update, select **Start Date**.
 - Under Date Options, select the option to use a formula and enter the formula *NOW()*.
3. Save and activate your rule.

SEE ALSO:

[Set Up Work Orders](#)

[Guidelines for Using Work Orders](#)

Work Order Line Item Fields

Work order line items have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Address	The address of the line item. The line item inherits its address from its parent work order, but it can also be updated manually.
Asset	The asset associated with the line item. If your org uses hierarchical assets (available after Spring '16), you may want to link a work order's line items with different assets. For this reason, line items do not automatically inherit their parent work order's asset value.
Currency ISO Code	The ISO code for any currency allowed by the organization. Available only for orgs with the multicurrency feature enabled.
Description	The description of the line item. We recommend describing the steps a user must follow to mark the line item Completed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field	Description
Discount	The percent discount to be applied to the line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
Duration	<p>The estimated time required to complete the line item. Specify the duration unit in the Duration Type field.</p> <p> Note: Work order duration and work order line item duration are independent of each other. If you want work order duration to automatically show the sum of the work order line items' duration, replace the Duration field on work orders with a custom roll-up summary field.</p>
Duration Type	The unit of the duration: Minutes or Hours.
End Date	The date when the line item is completed.
Geocode Accuracy	The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
Is Closed	Indicates whether the line item has been closed. Changing the line item's status to Closed causes this checkbox to be selected in the user interface.
Latitude	Used with Longitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.
Line Item Number	An auto-generated number that identifies the line item.
List Price	The price of the line item (product) as listed in its corresponding price book entry. If a product isn't specified, the list price defaults to zero. (Read only)
Longitude	Used with Latitude to specify the precise geolocation of the address where the work order is completed. Acceptable values are numbers between -180 and 180 with up to 15 decimal places.
Minimum Crew Size	<p>The minimum crew size allowed for a crew assigned to the line item.</p> <p>If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members on a service crew to determine whether it fits a line item's minimum crew size requirement.</p>
Order	The order associated with the line item. For example, you may need to order replacement parts before you can complete the line item.

Field	Description
Parent Work Order Line Item	The line item's parent line item, if it has one.  Tip: View, create, and delete a line item's child line items in the Child Work Order Line Items related list.
Priority	The priority of the line item. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • Low • Medium • High • Critical
Product	The product (price book entry) associated with the line item. This field's lookup search only returns products that are included in the parent work order's price book.
Quantity	The line item's quantity.
Recommended Crew Size	The recommended number of people on the service crew assigned to the line item.
Return Order	The return order associated with the work order line item.
Return Order Line Item	The return order line item associated with the work order line item.
Root Work Order Line Item	The top-level line item in a line item hierarchy. Depending on where a line item lies in the hierarchy, its root might be the same as its parent. (Read only)
Service Report Template	The service report template that the line item's service reports should use. If you don't specify a service report template on a work order line item, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the line item uses the default service report template.  Note: This field stays blank unless you update it on the line item. So to find out which template the line item's service reports will use, check its work type.
Service Territory	The service territory where the line item work is taking place.
Start Date	The date when the line item goes into effect.
Status	The status of the line item. The picklist includes the following values, which can be customized: <ul style="list-style-type: none"> • New—Line item was created, but there hasn't yet been any activity. • In Progress—Work has begun. • On Hold—Work is paused.

Field	Description
	<ul style="list-style-type: none"> • Completed—Work is complete. • Cannot Complete—Work could not be completed. • Closed—All work and associated activity is complete. • Canceled—Work is canceled, typically before any work began.
Status Category	<p>The category that each status value falls into. The Status Category field has eight default values: seven values which are identical to the default Status values, and a None value for statuses without a status category.</p> <p>If you create custom Status values, you must indicate which category it belongs to. For example, if you create a Waiting for Response value, you may decide that it belongs in the On Hold category.</p> <p>The <code>Status Category</code> field can be useful to reference in custom apps, triggers, and validation rules. Status categories let you extend and customize the work life cycle while still maintaining a consistent work classification for tracking, reporting, and business process management.</p>
Subject	The line item's subject. For example, "Tire Check."
Subtotal	The line item's unit price multiplied by the quantity. (Read only)
Total Price	The line item's subtotal with discounts applied. (Read only)
Unit Price	By default, the unit price for a line item is the product's list price from the price book, but you can change it.
Work Order	The parent work order of the line item. Because work order line items must be associated with a work order, this field is required.
Work Order Line Item Number	An auto-generated number that identifies the work order line item.
Work Type	The work type associated with the line item. When a work type is selected, the work order line item automatically inherits the work type's Duration, Duration Type, and required skills.

SEE ALSO:

[Set Up Work Orders](#)

[Guidelines for Using Work Orders](#)

Work Type Fields

Work types have the following fields. Some fields may not be visible or editable depending on your page layout and field-level security settings.

Field Name	Description
Auto-Create Service Appointment	<p>Select to automatically create service appointments on work orders or work order line items that use the work type.</p> <p> Note:</p> <ul style="list-style-type: none"> By default, the Due Date on auto-created service appointments is seven days after the created date. Admins can adjust this offset from the Field Service Settings page in Setup. If a work type with the Auto-Create Service Appointment option selected is added to an existing work order or work order line item, a service appointment is only created for the work order or work order line item if it doesn't yet have one. If someone updates an existing work type by selecting the Auto-Create Service Appointment option, service appointments aren't created on work orders and work order line items that were already using the work type.
Description	The description of the work type. Try to add details about the task or tasks that this work type represents.
Duration Type	The unit of the Estimated Duration: Minutes or Hours.
Estimated Duration	The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the Duration Type field.
Minimum Crew Size	<p>The minimum crew size allowed for a crew assigned to records using the work type.</p> <p>If you're not using the Field Service Lightning managed package, this field serves as a suggestion rather than a rule. If you are using the managed package, the scheduling optimizer counts the number of service crew members</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Name	Description
	<p>on a service crew to determine whether it fits a record's minimum crew size requirement.</p> <p> Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.</p>
Name	<p>The name of the work type. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, "Annual Refrigerator Maintenance" or "Valve Replacement."</p>
Recommended Crew Size	<p>The recommended number of people on the service crew assigned to the record using this work type.</p> <p> Note: This field is hidden for all users by default. To use it, update its field-level security settings and add it to your work type page layouts.</p>
Service Report Template	<p>The service report template associated with the work type.</p> <p>If you choose not to specify a service report template on a work order, it uses the service report template listed on its work type. If the work type doesn't list a template or no work type is specified, the work order uses the default service report template. The same is true for work order line items.</p>

SEE ALSO:

[Create Work Types](#)

[Guidelines for Using Work Types](#)

[Add Required Skills to Work Orders or Work Types](#)

[Track Required Parts](#)

Field Service Lightning Managed Package

The Field Service Lightning managed package builds on Salesforce's standard field service features to deliver a rich, highly customizable experience for dispatchers and technicians.

The Field Service Lightning managed package is translated into the 32 Salesforce supported languages and includes the following features.

Scheduling and optimization

A robust toolbox of work rules and scheduling policies optimizes resource assignments, taking skills, location, and your business objectives into account.

Administration app

Admins can integrate and maintain scheduling policies, global actions, sharing tools, and optimization rules all in one place.

Automatic user permission setup and updates

Set up your field service user permissions and keep them updated with the click of a button.

Dispatcher console

The console's appointment lists, scheduling actions, Gantt chart, and interactive map give dispatchers and supervisors a bird's-eye view of all service appointments. Dispatchers can ensure that the right job is routed to the right mobile employee and immediately see alerts for issues that need attention and take action. Schedule bulk jobs with just one click, and track and monitor service delivery in real time.

 **Note:** Before installing the Field Service Managed package, enable Field Service Lightning.

IN THIS SECTION:

1. [Install the Field Service Lightning Managed Package](#)
If your Salesforce org has Field Service Lightning enabled, you can install the managed package and build on standard field service features.
2. [Guided Setup for Field Service Lightning](#)
After you install the Field Service Lightning managed package, you can use Guided Setup in the managed package to create your service territories and operating hours, define your work types and skill sets, assign your agents, dispatchers, and service resources, and configure your scheduling policies. You can use guided setup as often as you'd like to adjust your field service setup.
3. [Set up the Field Service Lightning Managed Package](#)
After you install the Field Service Lightning managed package, you must create and permission sets and ensure page layouts, geocodes, and data integration rules are configured correctly.
4. [Field Service Lightning Managed Package Customization](#)
Learn the concepts behind the features in the Field Service Settings tab and how to adjust them to your needs.
5. [Field Service Lightning Dispatcher Console](#)
The Field Service Lightning Managed Package includes the Dispatcher Console, which is the main working space for dispatchers.

SEE ALSO:

[Understanding Packages](#)

[Enable Field Service Lightning](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Install the Field Service Lightning Managed Package

If your Salesforce org has Field Service Lightning enabled, you can install the managed package and build on standard field service features.

 **Note:** Field Service Lightning must be enabled in your org.

1. Click the appropriate installation link on the download page <https://fsl.secure.force.com/install>.
You can install on a production org or a sandbox org.
2. Select **Install for Admins Only**.
If you receive a request to approve third-party access, click **Yes** and **Continue**. This request allows Salesforce to collect the latitude and longitude values for service addresses so that the service scheduling optimizer can function.
3. If you get a message notifying you that the installation is taking longer than expected, click **Done**.
Once the installation is complete, you will receive an email notification.

After the package is installed, two new apps are included in the Apps Launcher. The Field Service app is for dispatchers, and the Field Service Admin app is for administrators. You can also add the Field Service and Field Service Settings tabs to other existing apps.

SEE ALSO:

[Customize Tabs on Lightning Experience Record Pages Using the Lightning App Builder](#)

Guided Setup for Field Service Lightning

After you install the Field Service Lightning managed package, you can use Guided Setup in the managed package to create your service territories and operating hours, define your work types and skill sets, assign your agents, dispatchers, and service resources, and configure your scheduling policies. You can use guided setup as often as you'd like to adjust your field service setup.

From the Field Service Admin app, go to the Field Service Settings tab. Under Getting Started, click Go to **Guided Setup**. Follow the steps in the left side panel in order, as each step relies on the previous step being complete. Once you've set up Field Service, you can return to guided setup and make adjustments in any order.

When you launch guided setup all Field Service Lightning permission sets are updated to the latest permissions required. If your user doesn't have the FSL Admin permission Set you are assigned the permission.

 **Note:** When editing details of a record in guided setup, your changes are saved immediately, there is no **Save** button.

The guided setup home page has icons at the bottom of the page showing the number of each related object in your org. Click on an icon to go to its guided setup page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To install the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

IN THIS SECTION:

[Define Field Service Territories with Guided Setup](#)

Define your service territories. This can represent a geographical and/or functional area of the organization. Try to create territories with no more than 50 resources to allow your dispatchers to focus on a reasonable amount of resources.

[Define Work Types and Skills with Guided Setup](#)

Chances are, your business performs the same tasks for multiple customers. Work types are work orders templates that save you time and make it easier to standardize your field service work. The skills required to complete those task are also standard to your company.

[Define Field Service Resources with Guided Setup](#)

Service Resources are users who can complete field service work. Define your service resources, their primary service territory, their skills, and assign them the necessary FSL licenses.

[Define Field Service Dispatchers and Agents with Guided Setup](#)

Define your dispatchers and agents that use Field Service Lightning. Assign licenses and permissions and create User Territory records to specify which territory the users cover.

[Define Field Service Appointment Booking with Guided Setup](#)

The Field Service Lightning Appointment Booking feature lets you offer truth-based graded appointment slots, meaning slots are based on actual availability of the mobile workers and graded according to the organization KPIs (key performance indicators) as defined in the selected Scheduling Policy.

[Define Field Service Scheduling Policies with Guided Setup](#)

When building and maintaining the schedule, the FSL scheduling and optimization engine apply scheduling logic that is defined in various scheduling policies. Scheduling policies are configurable. It is possible to have several policies for the same territory in different times or for various territories.

Define Field Service Territories with Guided Setup

Define your service territories. This can represent a geographical and/or functional area of the organization. Try to create territories with no more than 50 resources to allow your dispatchers to focus on a reasonable amount of resources.

Defining your service territories and having a manageable number of resources is a crucial step for Field Service Lightning to operate properly and provide the best optimization results.

Members of a territory automatically inherit the territory's operating hours unless different hours are specified on the service territory member record.

Define the address on the service territory, as it is used as the territory's default home base. If a service resource's home base is different, than define the address on the service territory member record. That overrides the default territory home base. Field Service Lightning uses the home base information to calculate travel for the first and the last leg of the day.

When creating new Operating Hours define the days of the week and hours for each day. Very important to select the Timezone that this Service Territory is located in. NOTE: If you need to create the Operating Hours with varying work hours for each day you will need to do this in the Record itself. The Guided Setup helps define generic Operating Hours. Select the new Operating Hours, they are now assigned to the new Service Territory.

1. Under Territories Definition, enter the name of the new service territory and click **Add**.
2. After the record is saved, edit the service territory details.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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- Use operating hours drop down, to select existing operating hours or create a new operating hour. When creating new operating hours define the days of the week and hours for each day. Click **Save Operating Hours** and the operating hours are saved to the new service territory. Create operating hours that vary each day on the operating hours record itself.

 **Note:** It's very important to select the timezone for the service territory.

Define Work Types and Skills with Guided Setup

Chances are, your business performs the same tasks for multiple customers. Work types are work orders templates that save you time and make it easier to standardize your field service work. The skills required to complete those task are also standard to your company.

- Under Work Types & Skills, enter a name and description. Try to use a name that helps users quickly understand the type of work orders that can be created from the work type. For example, Annual Refrigerator Maintenance or Valve Replacement.
- Add a Due Date Offset. When this value is set for a work type any work orders you create using the work type have their service appointments' due date set to the created date + due date offset.
- Add an Estimated Duration, which is how long the work is estimated to take.
- Add a Duration Type of minutes or hours.
- If you'd like a service appointment to be automatically created on work orders and work order line items that use the work type, select **Auto-Create Service Appointment**.
- You can also add required skills to work orders and work types so only resources with certain skills can be assigned to complete the work. In the **Skill Requirements** field start typing the name of the skill you wish to add. Select the skill from the list provided.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

Define Field Service Resources with Guided Setup

Service Resources are users who can complete field service work. Define your service resources, their primary service territory, their skills, and assign them the necessary FSL licenses.

Select a user and name your Service Resource. Optionally, fill in the Gantt label which is shown under the resource name in the dispatcher console. Select the Resource's primary territory. The primary territory is typically the territory where the resource works most often. Service resources can only have one primary territory. A primary service territory membership record is automatically created, which begins on the previous day and is open ended.

Select which licenses and permissions are needed for the user. A user must be assigned the scheduling license for its resource record to be available for scheduling services, such as scheduling from the dispatcher console or by the appointment booking chatter action. In addition, a user must be assigned the mobile license to log in to the FSL mobile app. The necessary licenses and permissions are added to the users by assigning the relevant FSL permission sets.

Below you can search the new and existing Service Resources and add/edit their Skills. Find the newly created resource and check the checkbox by their name. An Update Skills button will appear by the search field. Next to the search window you can see how many Dispatcher and Mobile licenses are available.

You can update Skills for multiple resources at a time. When updating the skills select the relevant Skills the resource has.

After making selecting the relevant skills there are 3 update options:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

- Add - Add the selected Skills to the Resource's current Skills.
- Remove - Remove the selected Skills from the Resource's current Skills.
- Override - Remove all current Skills assigned to the Resource and assign only the selected Skills

Define Field Service Dispatchers and Agents with Guided Setup

Define your dispatchers and agents that use Field Service Lightning. Assign licenses and permissions and create User Territory records to specify which territory the users cover.

Dispatchers need a license to access the dispatcher console. In addition, they need specific permissions for FSL features. Assign your dispatcher users the necessary license and permissions with the Dispatcher icon, which assigns the FSL Dispatcher Permissions and the FSL Dispatcher License permission sets.

Agents need specific permissions for FSL features. Assign your agents the minimal permissions needed with the Agent icon, which assigns the FSL Agent Permissions permission set.

 **Note:** It is required to use the FSL permission sets. The permission set holds the minimal permissions needed per each persons for the product to function well.

A User Territory record defines which territory these users cover. Create your user territory records to grant their users read/write access to the appropriate Field Service Lightning records.

1. Search for existing users to update or click **Add**.
2. Select the user from the drop down and then select the service territories that the user needs access to.
3. In the list assign either the dispatcher license and permissions or the agent permissions. A user cannot have both as the agent permissions is the most restrictive in FSL.
4. Make sure the user territory scheduled job under **Field Service Settings tab > Sharing > Automation** is configured properly so in the next run it will create and modify the sharing rows so your users will see the data they need. If you want to test, click **Run Now** after you finish configuring the scheduled job.

FSL Scheduled job to calculate sharing

As some of the FSL objects are time phased in nature, FSL need to calculate which of the records actually belong to the territories the Dispatchers and Agents covers so it will open up access to the correct records.

For example, John is a Dispatcher covering the New Jersey territory. The admin created a single User Territory record for John to open up access to FSL records which belong to New Jersey. Jane is a technician working in the Philadelphia territory, but next month she will be moving to work in New Jersey. The admin modified Jane's Service Territory Membership record for Philadelphia to end next month, and created a new service Territory Membership record for her to begin next month in New Jersey. As John should not see FSL records belonging to Philadelphia, FSL cannot share Jane's records with John immediately. Instead, a daily scheduled job will calculate which records should be exposed to John. The admin configured FSL time horizon to open up access 1 day before the service territory membership records starts, so a day before Jane starts to work in New Jersey, John will have access to records related to Jane.

After you create new user territory records:

1. Go to **Field Service Settings tab > Sharing > Automation**.
2. Expand the user territories scheduled job to see its details.
3. Make sure it is active and that all required territories are checked.
4. Evaluate the frequency the job runs and its time horizon.
5. Save you changes.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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- Optionally, you can click run now to update the sharing rows immediately.

Define Field Service Appointment Booking with Guided Setup

The Field Service Lightning Appointment Booking feature lets you offer truth-based graded appointment slots, meaning slots are based on actual availability of the mobile workers and graded according to the organization KPIs (key performance indicators) as defined in the selected Scheduling Policy.

On this page, define your default scheduling policy for the appointment booking and candidate quick actions, and create or update the arrival windows that you want to offer to your customers.

Scheduling Policy Select a scheduling policy for the appointment booking and candidates chatter actions. The default scheduling policy provided by Field Service Lightning upon installation is the customer first policy, which balances great customer service with travel minimization.

Operating Hours Select operating hours that specify the arrival window time slots you are offering to your customers. Field Service Lightning schedules appointments while making sure the scheduled start falls within the arrival window the customer requested. The default scheduling policy provided by Field Service Lightning upon installation is the Gold Appointments Calendar: two-hour time slots, 9am to 5 pm, Monday to Friday.

If you want to create a different operating hours for the appointment booking slots. Press **Create New Operating Hours**.

Set the Name of the Operating Hours. Next choose which days you wish to create slots for. Then the duration of each slot (i.e. 1 hour slots, 2 hour slots etc.) and between which hours. These slots will be created for each day selected between the hours defined. If you need to create more complex or varying time slots this can be done on the Operating Hours record itself.

Appointment Booking and Time Zones

Appointments may be booked for customers who reside in a different time zone than the technician, the agent or both. It is crucial that the arrival windows offered to the customer will be in the customer's timezone.

The FSL Appointment Booking chatter action was built to handle this requirement out of the box. When creating the work order (or the service appointment) it's important to populate the Service Territory lookup. The territory selected for the work order (or service appointment) should be the territory where the customer resides. That Service Territory needs to have an Operating Hours configured with the customer's time zone.

Based on this behavior, it is important to note that when creating an Operating Hours record for the Appointment Booking arrival windows, FSL does not consider the time zone defined for that Operating Hours record, instead it only considers the Time zone defined for the Operating Hours on the Service Territory which is populated on the Service Appointment record.

For example, GES (Green Energy Solutions) operation is covering the entire of the USA. John is a call center agent working from GES operation center located in New Jersey. Jane is a Senior engineer located in Idaho, but she may service customers from the neighboring states. Richard is a customer from Nevada who is calling the operation center trying to book an appointment.

John is setup as an agent, his user's time zone is Eastern Standard Time (EST). Jane is setup as a Service Resource. Her primary service territory is based on the Mountain Standard Time (MST) time zone. In addition, Jane user's time zone is set to MST as well.

When John is creating the Work Order for Richard, he is setting the Service Territory to match the customers address, so he is using a service territory set to the Pacific Standard Time time zone (PST).

Richard is presented with some time slots options for the engineer's arrival window and is selecting the 1:00 pm to 3:00 pm arrival window. This time slot is based on the Service Territory defined on the Service Appointment record which was inherited from the Work Order, meaning the arrival window is in PST time zone.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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John is booking the slot and closing the Appointment Booking chatter action. When John will check the arrival window details on the service appointment record, it will be presented to him based on the time zone configured under his user settings. As the time zone configured for him is EST, the arrival window will be shown to John on the page layout as 4:00 pm to 6:00 pm (EST).

On the day of service, Jane is opening her mobile app to see her day schedule. She will see that she have a Service Appointment assigned to her with arrival window of 2:00 pm to 4:00pm (MST) as her user timezone is set to Mountain Standard Time time zone.

In summary:

- Richard, GES's customer, received the arrival windows information in his time zone: 1:00 pm to 3:00 pm PST.
- For John the agent, the Appointment Booking chatter action shows the arrival windows in the timezone of his customer's time zone - 1:00 pm to 3:00 pm PST, and on the Service Appointment detail page he sees the arrival window in his user' time zone: 4:00 pm to 6:00 pm EST.
- Jane the engineer sees the arrival window in her time zone: 2:00 pm to 4:00 pm MST.

Define Field Service Scheduling Policies with Guided Setup

When building and maintaining the schedule, the FSL scheduling and optimization engine apply scheduling logic that is defined in various scheduling policies. Scheduling policies are configurable. It is possible to have several policies for the same territory in different times or for various territories.

A scheduling policy is a collection of two elements, which are: work rules and service objectives.

- A work rule filters out candidates (service resources) for a service appointment if they don't meet the rule requirements.
- A service objective is a desirable goal for scheduling, but not an absolute requirement. When assembling a scheduling policy, objectives can be assigned a weight in order to adjust the importance of certain objectives against others in the scheduling policy.

In this screen you can manage your scheduling policies. You can clone an existing policy or create a new one, and add and remove rules and objectives from a policy and change the objective weighting.

- 📌 **Note:** When cloning a Scheduling Policy it will add the same instances of the work rules and service objectives that the original policy had.

After creating or selecting an existing policy you can update the name, description, remove/add work rules.

- 📌 **Note:** All changes are committed immediately, there is no save or undo.

In the goals editor you can decide which service objectives to use on the scheduling policy and what their weight will be. When the weight is 0 the service objective will be removed from the policy. Below the graph will be updated to reflect the current weighting.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Set up the Field Service Lightning Managed Package

After you install the Field Service Lightning managed package, you must create and permission sets and ensure page layouts, geocodes, and data integration rules are configured correctly.

It is recommended your [service territories](#) are set up with their [operating hours](#) and [members assigned](#). For faster set up, your [work types](#) and [service resource skills](#) should also be configured.

IN THIS SECTION:

[Create Permission Sets with the Field Service Lightning Managed Package](#)

Configure and update permission sets with a click of a button.

[Assign Permissions with the Field Service Lightning Managed Package Permission Sets](#)

Give your users the permissions they need to complete their field service tasks.

[Efficiency with the Field Service Managed Package](#)

Some of your Resources work faster or slower than the Work Order estimated duration due to different skills, experience and seniority. Measure how fast service resources complete work orders and ensure that your work type duration estimates are accurate. FSL consider the resources efficiency when scheduling, and adjusting the appointment Scheduled End accordingly. This feature is available in Salesforce Classic and Lightning Experience.

[Assign Page Layouts from the Field Service Lightning Managed Package](#)

Update page layouts of field service objects for profiles used for field service lightning.

[Enable Map Polygons](#)

Setup and configure map polygons, so you can draw your own territories directly on the map.

[Manage Geocodes and Data Integration Rules for the Field Service Lightning Managed Package](#)

Ensure your data integration rules are set up so that the closet qualified resource can deliver field service.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To configure the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Create Permission Sets with the Field Service Lightning Managed Package

Configure and update permission sets with a click of a button.

1. In the App Launcher, select the **Field Service Admin** app.
2. Select the **Field Service Settings** tab.
3. Click **Getting Started** from the left-side panel.
4. Click **Permission Sets**.
5. Click **Create Permissions** on the **FSL Admin** tile.

Two permission sets are created: FSL Admin License and FSL Admin Permissions. These permissions allow users to access and manage all Field Service Lightning objects, including the Field Service Lightning Visualforce pages and logic services.

6. Click **Create Permissions** on the **FSL Agent** tile.

Two permission sets are created: FSL Agent License and FSL Agent Permissions. These permissions allow users to view all global actions and their related objects to create, book, and schedule service appointments.

7. Click **Create Permissions** on the **FSL Resource** tile.

Three permission sets are created: FSL Mobile License, FSL Resource License, and FSL Resource Permissions. These permissions allow users to view and manage service appointments and their related parent objects.

8. Click **Create Permissions** on the **FSL Dispatcher** tile.

Two permission sets are created: FSL Dispatcher License and FSL Dispatcher Permissions. These permissions allow users to access and manage the dispatcher console, global actions and their related objects, and schedule optimize and dispatch service appointments.

The app updates this permission sets for you. If you have extended the permissions sets, they are not overridden. You must assign these permission sets to your users according to their requirements.

For FSL to function properly users must be assigned with the needed FSL permission sets. Each role needed to be assigned with the appropriate permission sets.

- **Agents** need FSL Agent Permissions. This permission set holds the minimum permissions for FSL's chatter actions such as the Appointment Booking, Candidates and Emergency.
- **Mobile Workers (Technicians)** need:
 - FSL Resource Permissions, this permission set holds the minimum permissions needed so the user can change status and update its last known location.
 - FSL Resource License, this permissions set assigns the user the needed Permission Set License so the user can be scheduled in the scheduling engine and optimizer.
 - FSL Mobile License, this permissions set assigns the user the needed Permission Set License so the user can log in to the Field Service Mobile app.
- **Dispatchers** need:
 - FSL Dispatcher Permissions, this permission set contains the permissions of both the FSL Agent Permissions and the FSL Resource Permissions and in addition permissions needed to operate the Dispatcher Console and to run optimization.
 - FSL Dispatcher License, this permissions sets assigns the user with the needed Permission Set License needed to be able to load the dispatcher console.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To configure the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

- **FSL Admins** need FSL Admin Permissions. This permissions set contains the permissions the FSL Dispatcher Permissions contains and in addition permissions to configure FSL's configuration data such as Operating Hours and Scheduling policies.

FSL managed package has three major releases each year, following Salesforce's release cadence, Winter, Spring or Summer, within 72 hours.

As new versions require new permissions, it is critical that FSL's permission sets are updated with the new required permissions. This feature, introduced in Winter 18', ensures that once a new managed package version is pushed to your org, the FSL permission sets are automatically updated.

-  **Note:** When FSL updates these permission sets, every permission, which is part of the minimal definition and was removed, is added back. Every permission that was added by the customer is respected it is not removed.

The event that triggers the automatic update is when a user launching one of the managed package Visualforce pages. Once a user is opening one of the below pages, FSL checks to see if the permission sets were updated after the last upgrade, and if not, the permission sets are automatically updated, ensuring FSL functions properly

FSL Visualforce pages that trigger the automatic updates:

- The Dispatcher Console (vf001_ServiceExpert)
- The Appointment Booking chatter action (AppointmentBookingVf and AppointmentBookingCommunitiesVf)
- The Candidates chatter action (GetCandidates)
- The Emergency Chatter action (EmergencyWizard)
- The Admin Settings (vf066_settings)

-  **Important:** The action of permission set update is logged on the behalf of the user who triggered the update, even if this user is not holding the necessary permissions to update permission sets. If this is something you want to avoid, you can open a case with Salesforce support and ask to disable the Auto Update of FSL permission sets feature.

Assign Permissions with the Field Service Lightning Managed Package Permission Sets

Give your users the permissions they need to complete their field service tasks.

Field service players are generally sorted into one or more of the following profiles.

Administrator

A Salesforce admin integrates Field Service Lightning features and sets up user permissions as needed for your org.

Agent

Agents handle inbound cases, create work orders, and book appointments from the Salesforce console.

Dispatcher

Dispatchers build and manage appointments, assign technicians, and optimize scheduling based on technician skills, routing, and job priority.

Resource

Field resources or technicians receive work orders and appointments from dispatchers or agents. They also update job progress from mobile devices with the Salesforce app or the Field Service Lightning Mobile app.

1. From Setup, enter *Manage Users* in the Quick Find box, then select **Manage Users > Users**.
2. Click a field service user's name.
3. Click **Permission Set Assignments** at the top of the page or scroll down to the Permission Set Assignments related list.
4. Click **Edit Assignments**.
5. Enable the appropriate permission sets and click **Save**.

Tasks	Required Standard Profile	Permission Sets
Administrator: Manage all Field Service Lightning objects, including the Field Service Admin app, Field Service Lightning Visualforce pages, and logic services.	System Administrator	<ul style="list-style-type: none"> • FSL Admin License • FSL Admin Permissions
Agent: Access all global actions and their related objects to create, book, and schedule service appointments.	Standard User or System Administrator	<ul style="list-style-type: none"> • FSL Agent License • FSL Agent Permissions
Dispatcher: Access all global actions and their related objects to create, book, and schedule service appointments.	Standard User or System Administrator	<ul style="list-style-type: none"> • FSL Dispatcher License • FSL Dispatcher Permissions

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To enable the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Tasks	Required Standard Profile	Permission Sets
Manage service appointments and their related parent objects.	Standard User or System Administrator	<ul style="list-style-type: none"> FSL Mobile License FSL Resource License FSL Resource Permissions

- Click **Permission Set License Assignments** at the top of the page or scroll down to the Permission Set License Assignments related list.
- Click **Edit Assignments**.
- Enable the appropriate permission set licenses and click **Save**.

Permission Set License	Description
Field Service Standard	Enable this permission set license for all field service users.
Field Service Scheduling	Enable this permission set license for all mobile resources.
Field Service Dispatcher	Enable this permission set license for all dispatcher console users.
Field Service Mobile	Enable this permission set license for all mobile resources.

IN THIS SECTION:

[Set Custom Permissions](#)

Set custom user permissions to control access to actions and views for certain users.

Set Custom Permissions

Set custom user permissions to control access to actions and views for certain users.

Custom permissions are applicable to:

- Bulk actions such as dispatch, optimize, and schedule
- Console list views such as appointments for various statuses (canceled, flagged, scheduled, unscheduled, in jeopardy), contractors, Gantt chart, to do, etc.
- Resource scheduling actions, such as fill-in and fix overlaps
- Appointment scheduling actions, such as schedule, reshuffle, and group nearby
- Gantt views, such as multi day work and month views
- Map polygon actions such as create, edit, and view
- Service territory utilization
- Creating service resource absences from the Gantt chart
- Viewing secondary territory members on the Gantt chart

For example, if you'd like only a few dispatchers to be able to optimize your schedule, so the system isn't bogged down with too many optimization requests, you can create custom permissions for bulk actions in the dispatcher. For instance:

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- `FSL.Bulk Dispatch`
- `FSL.Bulk Optimize`
- `FSL.Bulk Schedule`

Removing any of these custom permissions will hide the action in the user interface. A user with the `FSL.Bulk Optimize` custom permission sees the Optimize action. Those without the `FSL.Bulk Optimize` custom permission can't run an optimization.

Efficiency with the Field Service Managed Package

Some of your Resources work faster or slower than the Work Order estimated duration due to different skills, experience and seniority. Measure how fast service resources complete work orders and ensure that your work type duration estimates are accurate. FSL consider the resources efficiency when scheduling, and adjusting the appointment Scheduled End accordingly. This feature is available in Salesforce Classic and Lightning Experience.

Efficiency is a measure of a technician's relative working speed. An efficiency of 1 means that the technician works at a typical or average speed. An efficiency > 1 means that the technician works faster than average, and < 1 means that the technician works slower than average.

The efficiency scale is between 0.1 and 10.0. A default value of 1 means "regular speed".

FSL uses the efficiency value to estimate the time that a technician needs to complete an appointment, according to the following formula: Actual time to perform an appointment = Duration / Efficiency. For example, if the appointment has a nominal Duration of 3 hours and the technician has an Efficiency of 1.5, the engineer is expected to complete the appointment in $3/1.5 = 2$ hours.

For example, the Estimated Duration for Battery Replacement is one hour.

- Alexander Raneri is an Expert, 'efficiency' is set to 2.00 -> the service appointment will be scheduled to end 30 minutes after Scheduled Start ($60/2=30$).
- Jane Austin is a Technician, 'efficiency' is set to 1.00 -> the service appointment will be scheduled to end one hour after Scheduled Start ($60/1=60$).
- Janice Gonzales is a Junior Technician, 'efficiency' is set to 0.50 -> the service appointment will be scheduled to end 2 hours after Scheduled Start ($60/0.5=120$).

 **Tip:** Factor in Efficiency in the priority field used in the 'Resource priority' Service Objective to prefer Service Resources that are more (or less) efficient.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Assign Page Layouts from the Field Service Lightning Managed Package

Update page layouts of field service objects for profiles used for field service lightning.

 **Important:** If you created field service profiles, perform the following steps on those profiles instead of the standard profiles.

1. From Setup, enter *Profiles* in the Quick Find box, then click **Profiles**.
2. Click **System Administrator**.
3. In the Page Layouts section, find the Operating Hours object and click **View Assignment**.
4. Change all the page layouts by selecting all the profiles and selecting **FSL Operating Hours Layout**.
5. Click **Save**.
6. Repeat the steps for the following objects.
 - Service Appointment (select FSL Service Appointment Layout)
 - Service Resource (select FSL Service Resource Layout)
 - Work Order (select FSL Work Order Layout)
 - Work Order Line Item (select FSL Work Order Layout)
 - Work Type (select FSL Work Type Layout)
7. Click **Save** and repeat for the Standard User profile.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Enable Map Polygons

Setup and configure map polygons, so you can draw your own territories directly on the map.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** under Users.
2. Click **FSL Dispatcher Permissions**.
3. In the Apps section, click **Custom Permissions**.
4. Click **Edit**.
5. Add the following available custom permissions to the enabled custom permissions.
 - FSL.Polygons - create\update
 - FSL.Polygons - view
6. Click **Save**.

 **Tip:** To give access to only a selection of your users, create custom permission sets and assign these permissions to those users.
7. In the Field Service Admin app, go to the Field Service Settings tab.
8. Click **Service Appointment Lifecycle > Creation**.
9. Enable *Classify service to the territory based on polygon*.
10. Set the territory classification policy to **Highest**.

When there are parent-child relationships between service territories (for example East Village and New York), the service appointment is set to the highest in the hierarchy (New York). Set it to **lower** if you want the lowest territory assigned (East Village). Middle tier territories are never assigned service appointments.

Considerations

- The dispatcher console supports loading up to 200 polygons.
 - A single polygon cannot have more than 3,200 coordinates.
 - If the service appointment geolocation matches more than one polygon, the appointment is assigned to the top-level territory or to the lowest territory in the hierarchy.
-  **Note:** When creating polygons, don't create overlaps unless there are parent-child relationships between the corresponding service territories (for instance East Village and New York). Middle tier territories are never assigned service appointments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To configure the Field Service Lightning managed package:

- Customize Application

Manage Geocodes and Data Integration Rules for the Field Service Lightning Managed Package

Ensure your data integration rules are set up so that the closest qualified resource can deliver field service.

When you enable Field Service Lightning, data integration rules are added to your org to update your field service objects with geolocation information. The geolocation information is used to calculate service resource travel times.

1. From Setup, enter *Data Integration Rules* in the Quick Find box, then select **Data Integration Rules**.

2. Click **Geocodes for Resource Absence Address**.

 **Note:** Resource absences without addresses, are considered at the resource's homebase.

3. Click **Edit Rule Settings**.

4. Ensure **Bypass triggers** is deselected.

5. Click **Save**.

6. Repeat these steps for the following Field Service Lightning objects:

- Geocodes for Service Appointment Address

 **Note:** Service appointments without addresses, are considered at the resource's homebase.

- Geocodes for Service Territory Address
- Geocodes for Service Territory Member Address
- Geocodes for the Address field of Address
- Geocodes for Work Order Address
- Geocodes for Work Order Line Item Address

EDITIONS

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Field Service Lightning Managed Package Customization

Learn the concepts behind the features in the Field Service Settings tab and how to adjust them to your needs.

IN THIS SECTION:

[Service Appointment Lifecycle in the Field Service Lightning Managed Package](#)

A service appointment lifecycle is the sequence of stages that a service passes through. The lifecycle covers the time when the service appointment is created until it is completed. You can configure each status to meet your business needs.

[Global Actions in the Field Service Lightning Managed Package](#)

Use derivations to map the fields on Field Service objects to fields required for scheduling service appointments.

[Scheduling Policies in the Field Service Lightning Managed Package](#)

A scheduling policy is a set of rules used in a scheduling operation. You can set the scheduling logic for Field Service Lightning, including work priorities, travel speed, and geocoding, and add company scheduling policies and time zone details to the dispatcher interface.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

[Schedule Optimization with the Field Service Lightning Managed Package](#)

The scheduling optimizer helps your field service team comply with SLAs, minimizes travel time, overtime, costs, and no-shows. It maximizes efficiency by assigning resources to as many service appointments per shift as possible. You can configure the optimizer to run repeatedly—for example, every day—or you can run it manually.

[Dispatch Policies in the Field Service Lightning Managed Package](#)

Manage how field service technicians receive jobs, either one at a time, hourly, daily, weekly, or monthly.

[Sharing for the Field Service Lightning Managed Package](#)

You can limit access to field service objects so that your service team members only see information relevant to them. Field Service Lightning includes out-of-the-box sharing tools to give team members access to the right information. For these tools to function, you need to change objects' default Public Read/Write sharing settings.

[Customize the Dispatcher Console with Field Sets](#)

The Field Service Lightning Managed Package uses Fields Sets as a tool for administrators to control which fields appear on some of the Visualforce pages of the managed package. This allows administrators to change the default setup of the information displayed on some key UI elements. For example, by changing a field set the admin can select which fields will appear as columns in the Dispatcher console service Appointment list.

[Gantt Live Update \(Beta\)](#)

The Dispatcher Console Gantt refreshes itself every according to what's defined in your Field Service Settings. With Gantt Live Update you can use Streaming API and Push Topics, so that relevant changes are reflected immediately on the Gantt.

Service Appointment Lifecycle in the Field Service Lightning Managed Package

A service appointment lifecycle is the sequence of stages that a service passes through. The lifecycle covers the time when the service appointment is created until it is completed. You can configure each status to meet your business needs.

Field Service Lightning includes these statuses to indicate an appointment's state in a cycle.

- None
- Scheduled
- Dispatched
- In Progress
- Completed
- Cannot Complete
- Canceled

Field Service Lightning offers a predefined list of service appointment statuses. This status reflects the state of the appointment in the system and follows its whole lifecycle – from creation to completion.

A service appointment lifecycle is the sequence of stages or statuses that a service passes through. The lifecycle covers the time when the service appointment enters the system until the time it reaches its final status. Field Service Lightning offers a predefined status transition of service appointment statuses.

To configure status settings:

1. Open the Field Service Admin app from the Field Service app menu.
2. On the Field Service Settings tab, click **Service Appointment Lifecycle**.
3. Click **SA Status**.

EDITIONS

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Each row represents a flow or transition in the lifecycle. To modify a flow, click a status or select a new status. The values are based on the Service Status picklist. Click the tool icon to:

- Limit transitions to specific profiles or leave it blank to remove any restriction
- Select a custom Visualforce page for a status transition when using the Chatter action for Change Status.

To create a flow, click **Add Flow**. To disable a flow, click the trash can at the far right of the transition road.

The status flow diagram shows your status flows, but it doesn't show your profile-based restrictions.

When a service appointment is unscheduled, either manually or automatically, its status changes to None.

- **When scheduling a service appointment, change its status to Scheduled**—When a service appointment is assigned to a resource, either manually or automatically, its status changes to Scheduled.
- **Unschedule the service appointment when its status is changed to Canceled or New**—When a service appointment's status is changed to Canceled or New, the service is unscheduled and removed from the Gantt chart.

 **Important:** If you change the service appointment lifecycle, sharing rules for the Service object also change.

- When a service appointment is created and assigned, it's visible only to the creator of the record (for example, a dispatcher, customer, or resource) and the relevant dispatchers based on user-territory sharing.
- When a service appointment's status is changed to Dispatched, the record is automatically shared with the user of the assigned resource.
- Canceled service appointments remove all sharing rules from the service. A Canceled service appointment is visible only to the owner of the service appointment and the relevant dispatchers based on the user-territory object.

 **Tip:**

- Activate or deactivate transitions based on your business needs.
- Change the status names to fit your business needs. Changing the name doesn't change a status's automatic transition behavior.

Global Actions in the Field Service Lightning Managed Package

Use derivations to map the fields on Field Service objects to fields required for scheduling service appointments.

The Book Appointment global action uses these mappings to get the correct information in the service appointment.

- Service Territory (where)
- Start and End Times (when)
- Scheduling Policy (how)
- Work Type (what)

You can also configure appointment and emergency booking behavior, such as policies and grading thresholds.

If automatic following for assigned resources is enabled, field technicians automatically follow records associated to their service appointments when the appointment's status category is changed to Dispatched or In Progress. Also, once the appointment is no longer in the Dispatched or In Progress categories, the assigned technician is automatically removed as a follower of all associated records.

EDITIONS

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You can enable automatic following for assigned resources in the Field Service Admin app. Under **Sharing > Automation**, check `Assigned resources to automatically follow service appointments upon Dispatch \ In-progress states`.

Scheduling Policies in the Field Service Lightning Managed Package

A scheduling policy is a set of rules used in a scheduling operation. You can set the scheduling logic for Field Service Lightning, including work priorities, travel speed, and geocoding, and add company scheduling policies and time zone details to the dispatcher interface.

Field Service Lightning includes the following scheduling policies.

- **Customer First**—Balances great customer service with travel minimization. Appointments are graded first by the customer's selection of a preferred employee and then by the ability to provide the service appointment as soon as possible. Travel minimization is the second priority.
- **High Intensity**—Typically used in times of high service volumes, like a storm scenario, where the business is focusing on employee productivity first and customer preferences as the second priority.
- **Soft Boundaries**—Identical to the Customer First policy but allows sharing employees between different territories to enhance service coverage.
- **Emergency**—Used with the Emergency Chatter action to dispatch emergency service appointments.

You can change the weights of the predefined scheduling policies. You can also copy a predefined scheduling policy and adjust the rules, objectives, and objective weights to match the needs of your company.

To add a service objective to a scheduling policy:

1. Navigate to the scheduling policy that you want to add the resource objective to.
2. In the Scheduling Policy Objectives related list, click **New Scheduling Policy Objective**.
3. For **Service Goal**, select an objective.
4. Enter the weight that the objective should use in the policy.
5. Click **Save**.

To add a work rule to a scheduling policy:

1. Navigate to the scheduling policy that you want to add the rule to.
2. Click **New Scheduling Policy Work Rule**.
3. Use the lookup to select the work rule you created.
4. Click **Save**.

 **Note:** A scheduling policy must include a resource availability rule. The Field Service Lightning managed package automatically adds one resource availability rule to each policy.

 **Tip:** After you define or modify scheduling logic, test the results of various scheduling scenarios by using the Get Candidates action in the dispatcher console.

IN THIS SECTION:

[Street Level Routing for Accurate Travel Times](#)

Street level routing improves travel calculation drastically as real turn-by-turn information is being considered.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

Reserve Time Slots for Designated Work

Create specific time slots dedicated to service appointments that meet your criteria.

Control Which Absences Appear on the Resource Gantt

Enable approval confirmation so only approved absences block your technician's availability and appear on the resource gantt chart. Unapproved resource absences are not considered in scheduling nor shown on the Gantt until they are approved.

Street Level Routing for Accurate Travel Times

Street level routing improves travel calculation drastically as real turn-by-turn information is being considered.

One of the most important KPI's that field service organizations track and try to improve is travel time per job. A small improvement can add a lot of time for the technician to perform additional work, drive less, save on gas, lower carbon footprint and reach the customer on time! Accurate route planning greatly contributes to the ability of your field force to perform at the highest level.

Routing allows you to calculate the following:

- Travel time – meaning how long it will take the worker to arrive at a location.
- Travel distance – from one location to another.

Field Service Lightning uses the routing service to help minimize the worker travel time and distance from one work order to another. And to calculate travel time and distance and make it visible for the user.

While Aerial routing computes the shortest distance between two locations based on a straight line route, SLR computes the distance along roads or transportation routes. This is the most accurate distance as it is based on information and measurements of actual road speeds and the expected travel speed based on road type. It provides an accurate calculation, thus enabling a better optimization of schedule.

To Enable SLR simply go to the Field Service Settings app>Scheduling>Routing and tick the Enable Street Level Routing box - that's it! From now on FSL will use SLR for travel calculation. SLR calculation takes a bit longer than Aerial routing calculation.

Street Level Routing Considerations

- Resource travel speed isn't taken into account when SLR mode is activated. However, if the calculation falls back to aerial routing, travel speed is then taken into account.
- The Street Level Routing Cache object improves SLR calculation time for distances that were already calculated in the last 30 days between two given points. We recommend you don't delete the SLR Cache object.
- The travel time is based on the Driving profile in Google maps and can't be changed.
- SLR creates a grid of 200m squares. Every service appointment within the grid gets the same geolocation for routing purposes.
- Service appointments with more than a 100-kilometer distance uses aerial routing instead.
- Multiday work scheduling doesn't support SLR and use aerial routing instead.
- When you drag and drop a service appointment the routing calculates depending on the chosen start time.
- Any scheduling action that is triggered in a transaction with data manipulation language uses aerial routing instead.

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Reserve Time Slots for Designated Work

Create specific time slots dedicated to service appointments that meet your criteria.

Specify time slots on your calendar reserved for predefined types of work. On the Operating Hours tab, right click a time slot to select one or more fields available from the context menu. The Field Service scheduling engine schedules the time slot for service appointments that meet the criteria. To add additional checkbox options to the calendar editor context menu, add the fields to the service appointment in Salesforce Classic.

1. Scroll over your profile picture, under Options select Switch to Salesforce Classic.
2. From the Setup, enter *Service Appointment* in the Quick Find box and select **Field Sets** under Service Appointments.
3. Click **Edit** next to Designated Work Fields.
4. Drag any check box field into the field set.

 **Note:** You can customize a field by adding it to the service appointment object.

5. Switch back to Lightning Experience in your profile dropdown.
6. From the Field Service Admin app, click the Schedule Policies tab.
7. Click the policy where you want to enforce the designated work time slots.
8. On the Related tab, under Scheduling Policy Work Rule, click **New**.
9. Add the Field Service - TimeSlot Designated Work work rule to the policy.
10. Click **Save**.

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Control Which Absences Appear on the Resource Gantt

Enable approval confirmation so only approved absences block your technician's availability and appear on the resource gantt chart. Unapproved resource absences are not considered in scheduling nor shown on the Gantt until they are approved.

 **Important:** Before enabling this feature, make sure you approve all existing absences.

1. Create an approval process for absences that checks the `Approved__c` field.
2. In the App Launcher, select the **Field Service Admin** app.
3. Select the **Field Service Settings** tab.
4. Click **Scheduling** in the left-hand panel and then click **General Logic**.
5. Check the `Activate approval Confirmation on resource absences` checkbox.
6. Click **Save**.

Schedule Optimization with the Field Service Lightning Managed Package

The scheduling optimizer helps your field service team comply with SLAs, minimizes travel time, overtime, costs, and no-shows. It maximizes efficiency by assigning resources to as many service appointments per shift as possible. You can configure the optimizer to run repeatedly—for example, every day—or you can run it manually.

For example, before running the service scheduling optimizer you may have:

- 62 scheduled hours
- 24 minutes average travel
- 51 scheduled jobs

After you run the service scheduling optimizer, you have:

- 69.5 scheduled hours
- 15 minutes average travel
- 56 scheduled jobs

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To create a permission set:

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

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IN THIS SECTION:

[Building Blocks of Field Service Lightning Optimization](#)

Work rules, service objectives and scheduling policies explained

[Activate the Field Service Lightning Optimizer](#)

Activate the service scheduling optimizer to set up the most efficient schedule possible for your business.

[Create a Field Service Lightning Optimization User](#)

To activate the scheduling optimizer, you create an optimization profile and optimization user. You then log in as the optimization user to complete activation.

[Fix Scheduling Overlaps](#)

Reschedule appointments that overlap another appointment or an absence with the click of a button.

[Fill-In Schedule Gaps for Service Resources](#)

Fill-in schedule creates a list of appointments for a technician and finds the optimal schedule.

[Group Nearby Appointments](#)

Group nearby appointments that are close to a given appointment.

[Reshuffle Appointments to Schedule High Priority Work Over Lower Priority Jobs](#)

When your schedule has no room for that high priority job, Appointments Reshuffle moves lower priority jobs to a later date or unchedules them. This frees up your technician for the more important job.

[Enable Single Resource Optimization](#)

Get a handle on last-minute schedule changes with Resource Schedule Optimization. Every night before the day of service begins Global Optimization runs and creates the optimal schedule for all the resources. Sometimes, jobs get canceled, resources run late ,and emergency jobs come in. Resource Schedule Optimization is a quick, intelligent way to optimize an individual resource's schedule and get the optimal route based on the changes.

SEE ALSO:

[Create a Field Service Lightning Optimization User](#)[Optimization Limits and Considerations](#)

Building Blocks of Field Service Lightning Optimization

Work rules, service objectives and scheduling policies explained

IN THIS SECTION:

[Field Service Lightning Definitions for Optimization](#)

Work rules, service objectives, scheduling policies, and relevance groups are important to efficient optimizations. Learn how they are defined in relation to Field Service Lightning.

[Work Rules for Optimization](#)

Review the work rules that affect field service optimization.

[Service Objectives for Optimization](#)

An objective is a desirable goal for the logic operation, but not an absolute requirement.

[Optimization Limits and Considerations](#)

Learn about the limits and considerations that exist for optimization in Field Service Lightning.

EDITIONS

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Field Service Lightning Definitions for Optimization

Work rules, service objectives, scheduling policies, and relevance groups are important to efficient optimizations. Learn how they are defined in relation to Field Service Lightning.

Work Rules

Work rules are hard yes-no qualifiers, allowing to instantly identify those field resources who are actual candidates for the job at hand. A work rule places a constraint on scheduling; It defines which assignments (an assigned resource, such as a technician, for a specific service at a specific time) are valid and which are not. For example, the Match Skill rule ensures that a service will be assigned only to resources that have the skill set needed to perform the task.

Field Service Lightning comes with a predefined set of Work Rules. These can be edited, limited to specific groups of resources (using relevance groups) and even applied differently to different types of Service Resources.

The system will never schedule work to resources who violate one of the rules by itself. Manual override is possible on the Gantt itself, in which case a rule violation notification will be shown, and an explanation highlighting which rule is violated will be shown in the tooltip.

Service Objectives

Every company has its own set of business goals and priorities. Field Service Lightning allows you to modify its scheduling behavior and adjust it to your company's needs. As many field service objectives might conflict with one another, these objectives can be weighed and considered in every scheduling decision made by the system.

A service objective reflects a scheduling goal or target. Each objective returns a grade, or score, for services. When a service is scheduled, the scheduling engine calculates the added score of an objective, and the total score of all objectives taken into consideration is the scheduled service's total score. Services with higher scores are preferred by the scheduling engine.

Scheduling Policies

Scheduling Policies align system's behavior with organizational KPIs in determining an 'optimal' resource for each and every service appointment at hand. It combines Work Rules and Service Objectives to scenario-specific behavior preference (business as usual, high load, emergency, etc').

A scheduling policy is a set of work rules and service objectives that the scheduling engine can consider when it's finding the best candidates and slots to create an optimized schedule. Field Service Lightning comes with a predefined set of scheduling policies, and you can edit them or create your own.

Relevance Groups

It is very common for Service Resources to differ one from another (Full Time vs Part Time, Internal vs Contractor, etc) and this may affect how scheduling rules should apply to them.

Most Rules and Service Objectives contain various inner configurations. Rules and Objectives may be cloned (one for each category of resources), allowing you to modify internal configurations and then to limit each record to the right group ('Relevance Group') with one of the two visualforce components:

- Work Rule component: Vf001GRoupOnWorkRules
- Service Objectives component: Vf002GroupOnObjectives

Relevance Group may be defined based on one of the following:

- Boolean on the Service Resource record
- Boolean on the 'Service Territory Member' record

 **Important:** For the scheduling logic to function, Service Appointments must be parented by Work Order or Work Order Line Items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Work Rules for Optimization

Review the work rules that affect field service optimization.

IN THIS SECTION:

[Field Service Optimization Work Rule: Service Resource Availability](#)

This fundamental rule type ensures that a resource is available to perform the service. This is based on each service territory's operating hours (default) or on service resources' operating hours assigned to them via their service territory member record (which overrides the default).

[Field Service Optimization Work Rule: Match Boolean](#)

This rule type validates that a Boolean property on the Service Resource object is set to true or false. For example it can check whether a Service Resource is Active, and avoid scheduling an inactive Service Resource.

[Field Service Optimization Work Rule: Match Skills](#)

This rule type matches the required skills for a service with a resource's skill set. It can also be used to match skill levels.

[Field Service Optimization Work Rule: Match Fields](#)

This rule type matches a property between 'Service Appointment' and 'Service Resource' objects. Considering the 50-skills per resource guidance (see 'Match Skills' rule), It is particularly useful in scenarios where Service Resource Skills embody a complex model. For example, categorizing Service Resources Skills per territory+technical level+specific parts or products to work on.

[Field Service Optimization Work Rule: Match Time Rule](#)

Timing is everything in Field Service, and the 'Match Time' Rule enables FSL users to perfect timing like no one else! This rule does so by limiting the scheduling time windows according to service date, and other time properties.

[Field Service Optimization Work Rule: Required Resources](#)

This rule type ensures that the assigned resource for the service is one of the required resources specified on the service. This rule is particularly useful when a 1:1 relationship between a customer and service provider must be maintained. Home healthcare with dedicated providers is a great example.

[Field Service Optimization Work Rule: Excluded Resources](#)

Sometimes service organizations may need a way to make sure certain Service Resources never interface with specific customers. This may be a result of poor service delivered by the resource previously, competitive situations (where end customers compete with one another) or other.

[Field Service Optimization Work Rule: Maximum Travel From Home](#)

This rule type lets you set the maximum distance or maximum travel time between a Service Resource's home base and their first Service Appointment.

[Field Service Optimization Work Rule: Service Appointment Visiting Hours](#)

Often times, customers will have specific demands with regards to service delivery times (for example a shopping mall will only agree to maintain its elevators after hours). This rule assures the service scheduling optimizer will only schedule appointments for customers within their visiting hours.

[Field Service Optimization Work Rule: TimeSlot Designated Work](#)

For many service organizations, work continues well after working hours are over, and Service Resources may be asked to work 'on call' and be prepared to handle urgent work that cannot stand a delay until next day. There are many scenarios where service organizations need to reserve certain times of the day to handle only one type of work. When only one type of work should be allowed for scheduling at specific times of day, the TimeSlot Designated Work Rule comes to play.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Optimization Work Rule: Match Territory

Service Resources need to belong to a Service Territory in order to be considered for Service Appointments. Match Territory is the rule that matches between the Service Territory of the Service Appointment and the one of the Service Resource.

Field Service Optimization Work Rule: Working Territories

Sometimes, resources need to be available to take on work in more than one group or geographical area. The Working Territories rule supports such scenarios, governing the Primary and Secondary Territory Memberships.

Field Service Optimization Work Rule: Service Resource Availability

This fundamental rule type ensures that a resource is available to perform the service. This is based on each service territory's operating hours (default) or on service resources' operating hours assigned to them via their service territory member record (which overrides the default).

This rule takes into account travel time (or gap) between appointments and previously scheduled services, as well as additional constraints described in this table.

Field Name	Description
Overtime	If set to 'True', the system will allow scheduling work during time marked in the relevant 'Operating Hours' record as 'Extended'. You may need to add field to layout.
Fixed Gap	If selected, the gap between services will be based on the minimum gap field, without travel calculations. This setting is useful for remote consultants; for example, you may want to provide twenty minutes between appointments for record-keeping.
Minimum Gap (minutes)	Determines the minimum gap between services. If Fixed Gap is selected, the value here will determine the gap between the services.
Break Start	Determines the minimum break start time in the format {HH:MM} to create breaks. Leave this field empty if you don't want to create breaks.  Note: Break start will be considered as earliest possible time, not set time. When scheduling the system will insert the break between service appointments, as close as possible to earliest start time but without compromising ability to start and complete service appointments.
Break Duration	Defines break length
Travel from Home (minutes)	Determines how many minutes the resource will be available for travel before the start of the work day (at the resource's expense). If this field is empty, any amount of travel before the start of the work day is valid.
Travel To Home	Determines how many minutes the resource will be available for travel at the end of the work day (at the resource's expense). If this field is empty, any amount of travel after the end of the work day is valid.

EDITIONS

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It is very common for service resources to differ from one another in how scheduling rules apply to them (Full Time vs Part Time, Internal vs Contractor, etc). Resource Availability is a key rule to materialize this differentiation, whether it's the ability to work overtime, receive a scheduled break (or not) and its duration, and finally - defining where one should be at the beginning and end of his or her availability.

Using the `VF001GroupOnWorkRules` Visualforce component, you may differentiate between resources based on custom boolean fields on the 'Service Territory Member' object.

Travel at the Expense of the Resource

Resource Availability rule relies on one's 'Operating Hours'. It is important to define where the service resource should be at the beginning and end of his or her daily availability.

- **Be On Site:** If one's availability starts at 9 AM, and the expectation is for the resource to commence work on site at this time, then travel should occur 'at the expense of the resource' or in other words, before the availability begins.
 - Assign maximum time that the system should consider for travel before Service Resource availability begins.
 - You may choose 'unlimited travel time' by keeping the 'Travel From/To Home' fields blank.
- **Start Driving:** If one's availability starts at 9 AM, and the expectation is for the resource to start driving towards its first work site, then travel time occurs 'at the expense of the employer.'
 - Set Travel From home to zero.

When scheduling contractors, the Service Resource Availability work rule fails if one of the following happens.

1. There are more scheduled working hours than specified on the resource capacity.
2. There are more scheduled work items than specified on the resource capacity.
3. A service appointment was scheduled to a resource capacity and then its capacity was deleted or changed.

Field Service Optimization Work Rule: Match Boolean

This rule type validates that a Boolean property on the Service Resource object is set to true or false. For example it can check whether a Service Resource is Active, and avoid scheduling an inactive Service Resource.

This rule contains two key fields.

- **Resource Property:** points the rule to the relevant field on the Service Resource object.
- **Value is True:** defines whether a rule is triggered when the property is set to True or False.

If you wish to introduce a new Boolean for consideration by this rule, simply add the API name of your new field as a picklist value to the 'Resource Property' field.

Active Resources is a Match Boolean rule type that is provided out of the box with Field Service Lightning. It serves two purposes.

- It assures that only 'Active' Service Resources are considered for scheduling.
- It allows to preserve historical data on the Gantt, so even after a Service Resource is no longer employed by the company, the historical data remains.

The optimization cloud supports a maximum of 10 Match Boolean rules in a single scheduling policy.

EDITIONS

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Field Service Optimization Work Rule: Match Skills

This rule type matches the required skills for a service with a resource's skill set. It can also be used to match skill levels.

Field Name	Description
Match Skill Level	If selected, Service Resources whose skill level is lower than what is specified on the service will be filtered out, and won't be considered as eligible candidates to perform the service.

You can create skills from the Setup section. Note: do not confuse with "Work.com Skills" and "Service Resource Skills". Look for Field Service > Skills section. You only need to assign Name and Developer Name.

Skill requirements are derived from Work Types. Once your skills are created, you may assign them to relevant work types.

Once your skills are created and assigned to relevant work types, you may assign skills to individual Service Resources, including Skill Levels.

Look for the lowest common denominator. Only configure skills that will make a difference when making scheduling decisions: Do not include skills that are common amongst all Service Resources. Aim to assign less than 50 skills per resource.

Leverage time phased skills. Certain skills such as mandatory periodic drug tests, or mandatory certifications may have an expiry date after which the Service Resource should not be scheduled unless updated. On the Service Resource profile, each skill can be set to 'Phase Out' at a certain date.

Field Service Optimization Work Rule: Match Fields

This rule type matches a property between 'Service Appointment' and 'Service Resource' objects. Considering the 50-skills per resource guidance (see 'Match Skills' rule), It is particularly useful in scenarios where Service Resource Skills embody a complex model. For example, categorizing Service Resources Skills per territory+technical level+specific parts or products to work on.

This rule is currently not supported by the optimization cloud.

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Field Service Optimization Work Rule: Match Time Rule

Timing is everything in Field Service, and the 'Match Time' Rule enables FSL users to perfect timing like no one else! This rule does so by limiting the scheduling time windows according to service date, and other time properties.

Component	Definition
Service Schedule Time Property	Defines if the rule controls the planned beginning or end of a Service Appointment time frame.
Service Time Operator	How the time fields are compared to each other. Options are: Before, Before or Equal to, Equal to, Later than or Equal to.
Service Time Property	<ul style="list-style-type: none"> • EarliestStartTime/DueDate: The total time frame during which a service should commence and complete. • ArrivalWindowStart/EndTime: The narrower time frame (usually an appointment) promised to the customer.
Pass Empty Values	If the values of either of the Service Time Properties are empty then ignore this rule.

EDITIONS

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Field Service Lightning comes with two pairs of out-of-the-box match time rules which govern the fundamental time dimensions of FSL making scheduling possible.

- Earliest Start Permitted: ensures that the service will be executed on time in relevance to the earliest start allowed by validating that the equation $\text{Early Start} \leq \text{start}$ is true.
- Due Date: ensures that the service will be executed on time in relevance to the required due date by validating that the equation $\text{Due Date} \leq \text{finish}$ is true.

These two rules take care of the broadest time horizon, the "Playground" in which the Service Appointment must take place - often measured in 3-7 days.

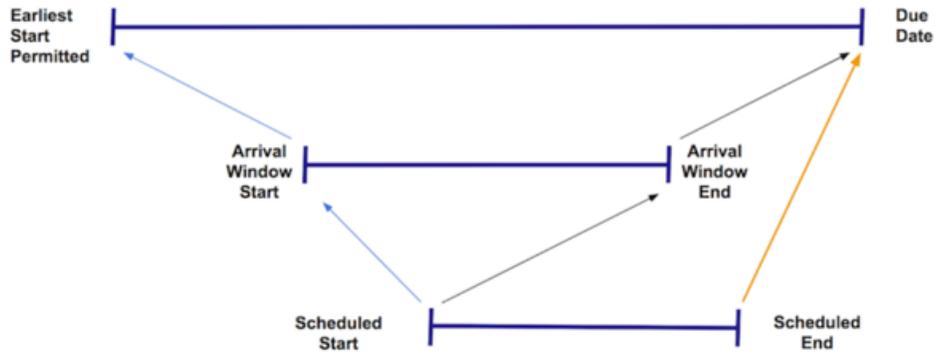
These two rules are essential for the system to be able to function in a time space, and so they are always automatically included in every scheduling policy.

- Arrival Window Start: ensures that the resource will not arrive to the service site before the promised Appointment Start by validating that the equation $\text{Appointment Start} \leq \text{Start}$ is true.
- Arrival Window End: ensures that the resource will arrive to the service site before the promised Appointment Finish by validating that the equation $\text{Start} \leq \text{Appointment finish}$ is true.

The second set of rules looks after the appointment booking functionality and enforces scheduling within the much more constrained time windows, usually two to four hours.

With the rules in place, the system is able to produce "Scheduled Start/End" times.

- Scheduled Start will always happen within the time windows, leveraging travel time calculation from previous Service Appointment to calculate exact start time within these windows.
- Scheduled End will be derived from Scheduled Start time + Work Type Duration.



Time constraints limit system's ability to optimize. Validate current-state time constraints and customer commitments when booking appointments, and evaluate the desired goals.

- Improve service delivery within SLAs
- Reduce customer wait time when booking appointments

Field Service Optimization Work Rule: Required Resources

This rule type ensures that the assigned resource for the service is one of the required resources specified on the service. This rule is particularly useful when a 1:1 relationship between a customer and service provider must be maintained. Home healthcare with dedicated providers is a great example.

This rule leverages the 'Resource Preference' related list on the Account & Work Order objects. To assure only specific resources are scheduled to service a specific account, create new resource preference in the account, lookup the Service Resource at hand, and set preference type to 'Required'. When a new Work Order is created, this information will carry over and be considered when making scheduling decisions and recommendations.

Be mindful of the fact that this is a highly restrictive rule, as it narrows down the options for the system only to the resources noted as required for a particular account.

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Field Service Optimization Work Rule: Excluded Resources

Sometimes service organizations may need a way to make sure certain Service Resources never interface with specific customers. This may be a result of poor service delivered by the resource previously, competitive situations (where end customers compete with one another) or other.

This rule type insures that the assigned resource is not one of the excluded resources specified on the Work Order. It leverages the 'Resource Preference' related list on the Account & Work Order objects. In order to exclude resources from being scheduled to service a specific account, create new resource preference in the account, lookup the Service Resource at hand, and set preference type to 'Excluded'. When a new Work Order is created, the Resource Preferences will be copied from the Account and be considered when scheduling.

Most resource 'exclusions' are based on availability, proximity, and skills - aspects covered by other rules in Field Service Lightning. We recommend to leverage this rule to manage 'non systematic exceptions' - in other words, scenarios where a rare event (a customer complaint for example) serves as the trigger to exclude someone from serving the account, even though the resource is fully qualified based on all other rules.

Field Service Optimization Work Rule: Maximum Travel From Home

This rule type lets you set the maximum distance or maximum travel time between a Service Resource's home base and their first Service Appointment.

This work rule may be particularly useful if the Service Territories don't represent geographical regions but rather functional such as Maintenance and Installation departments. In such a situation, this rule prevents resources from being assigned to services that are too far from their home base.

Component	Definition
Maximum Travel From Home Type	Define the maximum distance based on travel time or distance. Both options are calculated using aerial distance, or more commonly, as the crow flies.
Maximum Travel From Home	The numerical value to be considered: minutes, or miles/kilometers, the default setting in Field Service Settings.
Relevance Groups	You may apply this rule to specific types of resources based on custom fields in the Service Territory Member object, as well as for specific types of Service Appointments, based on a custom Boolean field on the object.

Additional Considerations

- If a Service Resource's Home Base hasn't been specified, they cannot be a candidate for any Service Appointment.
- If a Service Appointment does not have geo coordinates (address) they can be assigned to any resource with a Home Base.
- The Maximum value on the work rule must be positive.
- The relevance groups on the object may be used to address scenarios where certain type of work or certain type of resources should not be dispatched far away in the morning.
 - Do not drive more than 20 Miles away for maintenance work at day start.

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- Do not dispatch highly qualified workers more than 20 Miles away at day start.

Field Service Optimization Work Rule: Service Appointment Visiting Hours

Often times, customers will have specific demands with regards to service delivery times (for example a shopping mall will only agree to maintain its elevators after hours). This rule assures the service scheduling optimizer will only schedule appointments for customers within their visiting hours.

Dispatchers can manually schedule appointments outside customer's visiting hours, though they'll be alerted of a rule violation when they are doing so. This rule leverages the 'Operating Hours' lookup field on the Account.

Simply create a new 'Operating Hours' record with the correct time intervals in which service delivery is possible for the customer, and reference this record via the 'Operating Hours' lookup field on the Account (add to layout, available by default). When done, don't forget to add the rule to your scheduling policy.

Field Service Optimization Work Rule: TimeSlot Designated Work

For many service organizations, work continues well after working hours are over, and Service Resources may be asked to work 'on call' and be prepared to handle urgent work that cannot stand a delay until next day. There are many scenarios where service organizations need to reserve certain times of the day to handle only one type of work. When only one type of work should be allowed for scheduling at specific times of day, the TimeSlot Designated Work Rule comes to play.

This rule relies on the 'Operating Hours' object, and its 'Designated Work' functionality and Service Appointment Booleans. With the rule included in your scheduling policy, you can assign time slots, and set them to 'Designated Work'. Select the differentiating Boolean on the Service Appointment, and the system will only allow to schedule Service Appointments where this value is set to True.

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Field Service Optimization Work Rule: Match Territory

Service Resources need to belong to a Service Territory in order to be considered for Service Appointments. Match Territory is the rule that matches between the Service Territory of the Service Appointment and the one of the Service Resource.

This rule matches between the "Service Territory" lookup field on Service Resource's Service Territory Membership, and the same field on the Service Appointment objects.

The Match Territory Work Rule assumes 1:1 relationship between Service Resources and their territories. For example: Johanna is a Service Resource working in the Los Angeles area. This rule is suitable when working in a different group or territory is an exception rather than the rule, in which case it is handled by the Relocation feature, which is also enforced by this rule.

Field Service Optimization Work Rule: Working Territories

Sometimes, resources need to be available to take on work in more than one group or geographical area. The Working Territories rule supports such scenarios, governing the Primary and Secondary Territory Memberships.

A resource can belong to one 'Primary' territory but multiple 'Secondary' territories. By default, the Working Territories rule doesn't consider the primary territory and only considers a match if the service appointment territory matches one of the secondary territories. If you want the optimizer to consider the primary territory as well, ensure 'Working Location Enable Primary' field is checked.

In designing your solution, you will need to decide between "Match Territory" & "Working Territories" rules. Consider how your data model is structured.

- How many Service Resources
- How many Service Territories
- How often the Service Resource might be called in to a different Service Territory

If the movement is inevitable (Service Territories can't merge into one) and frequent (Service Resources constantly move), then 'Working Territories' will be the right Work Rule to include in your scheduling policy. Relevance Groups may come very handy when some Service Resource are more "static" than others, and the need to be able to differentiate exists.

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Service Objectives for Optimization

An objective is a desirable goal for the logic operation, but not an absolute requirement.

Objective: Minimize Travel

Minimize travel is an objective that optimizes scheduling a service with the goal of minimizing the travel time required by field resources. The minimize travel time objective is a starting point. You can configure this objective indirectly by increasing weight levels in other objectives for business values other than minimizing travel time.

Minimize travel scale will be based on the maximum and minimum travel time of each scheduling option for a given SA. For example, if the system has an option to schedule the SA next to another SA in the same-site (0 travel time) and the worst option is one hour long. When using this objective in the optimization service, the system is set to scale travel time between 0 and 120 minutes. If you would like to change it, please contact Salesforce support.

Objective: ASAP

This objective schedules the service as soon as possible. It normalizes the scheduling date-time on a linear scale of 0-100 between the earliest and the furthest scheduling option. For example, if the earliest option is Now and the furthest option is in two weeks, an assignment evaluated for 1 week ahead will get a score of 50.

In the optimization engine, when multiple services are evaluated simultaneously, the scale is between now and 30 days.



Tip:

- ASAP objective may contradict other objectives such as Minimize travel, as sometimes, scheduling the service as soon as possible won't be the best option from travel standpoint.
- If you want to add 'balance' between employees, ASAP is a good option.

Objective: Minimize Overtime

This objective will try to minimize the use of overtime hours. The scale will be between 0 and the scheduled service duration. For example, if an hour long service is scheduled entirely on OT, the score will be 0. If it's only half on OT, the score will be fifty.

Objective: Preferred Resource

This objective will give a score of 100 to a schedule of a service to the WO's preferred resource, zero otherwise.

Objective: Resource Priority

This objective will look at the resource's priority field. It will rank each SA schedule option based on the resource's priority value. The lower the number the higher is the score given by the objective.

Objective: Skill Level

This objective will score the SA assignment based on the assigned resource skill level. The objective has two options.

- Least qualified: the least qualified valid candidate will be preferred. This is a great option when you try to dispatch a resource that is 'good enough' to perform the job.
- Most qualified: the most qualified valid candidate will be preferred. For example, you can use this option in conjunction with relevance groups in order to send your most qualified resources only to Work Orders of VIP accounts.

In case multiple skills are required by the WO, the objective will evaluate all skills and will base the score on the average.

Internal Objectives

When using the optimization service, a 'Priority objective' will be automatically added to the scheduling policy. This objective is set to promote higher priority SAs over lower ones. This internal objective's weight can be changed in special cases.

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Optimization Limits and Considerations

Learn about the limits and considerations that exist for optimization in Field Service Lightning.

When using the optimization service, consider the following.

- To be included in optimization, a service appointment must have a work order or work order line item as its parent record.
- If a service appointment doesn't list an address and therefore lacks a defined latitude and longitude, the scheduling optimizer uses the appointment's assigned resource's home base to make scheduling decisions.
- To troubleshoot optimization request failures, add the field `Failure Details` to the layout of the Optimization Request object.

Optimization Request Limits

Limit	Details
Maximum service appointments optimized per rolling 24 hours	50,000
Maximum service appointments optimized per request	5,000
Maximum service resources optimized per request	500
Maximum days optimized per request	21
Maximum number of objects passed to the optimization service in 1 request (for example, service appointments + related objects such as required skills and assigned resources)	45,000

Setting Optimization Run Time

The longer an optimization runs, the closer it gets to an optimal solution. You can control the optimization run time per task according to your preference. In Field Service Settings, click **Optimization > Logic**. Select your preferred run time in `Optimization run time per service appointment` and then click **Save**.

For better-quality results, use **High**. For quicker results, use **Low**. In many cases, Low is enough for the optimizer to produce a satisfactory schedule. Run time never exceeds two hours. The ratio of run time for Low:Medium:High is 1:2:3 (meaning High-level optimization takes three times as long as Low-level optimization).

Longer run times might be beneficial in the following scenarios.

- *Many candidates per service appointment:* Service resources are considered candidates for a service appointment if they comply with all the rules of the scheduling policy in use. For example, a scheduling policy may require candidates to be working in the relevant service territory in the required time, to have the required skills, and to have a home base that is within the maximum travel range from the service appointment. When a service appointment has many candidates, the optimizer must consider many scheduling options and may benefit from longer run time.
- *Service resources start their day from a centralized service depot:* Do your service resources start their day from home, or from a centralized service depot? When many service resources start from the same place and could potentially be routed to the same work, the optimizer needs more time to determine the optimal routes.

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- *Service appointments have the same priority:* Service appointments of a higher priority serve as ‘anchors’ for the optimizer and narrow down the routing options. When all, or most, service appointments have the same priority, the optimizer needs more time to determine the optimal routes.
- *Complex work:* A complex work chain is a chain of dependent service appointments. The dependency could be the chronological order of the service appointments, or that they have to be done by the same service resource. Complex work requires more computation time. In cases where complex work is common, consider allowing more run time for the optimizer.
- *SLR (Street Level Routing):* Aerial travel times are a quick arithmetic calculation. For SLR, the optimizer uses some of the optimization time to fetch travel times from a GIS server, requiring a longer run time. However, as optimization continues to be used, Field Service Lightning will learn the SLR travel times of your service territories and will become more efficient. We recommend using a longer run time for the first few weeks when optimizing a new service territory.

Activate the Field Service Lightning Optimizer

Activate the service scheduling optimizer to set up the most efficient schedule possible for your business.

1. As a system administrator with the “Modify All Data” user permission, navigate to the Field Service Settings tab.
2. Click **Create Optimization Profile** in the left-hand navigation bar.
 -  **Note:** This process consumes one Salesforce license. Before you enable optimization, ensure that a license is available.
3. When you’re prompted, switch to the newly created optimization user to set up your optimization:
 - a. From Setup, click **Users** and locate the optimization user.
 - b. Click **Edit** next to the user and select **Active** on their profile.
 - c. Select **Generate new password and notify user immediately**.
 - d. Log out.
4. When you receive a password reset email, click the link and complete the steps to log in to your org as the optimization user.
5. When you’re logged in, click the + icon to see your full list of tabs.
6. Click the Field Service Settings tab.
7. Click **Activate Optimization**.
8. Click **Allow** to allow remote site access and be redirected back to the settings tab.

Optimization is now active in your org, as seen by the **Optimization Active** message in the left-hand navigation bar on the Field Service Settings page. You can log out as the optimization user and log back in with your regular username and password.

To have the optimizer run on repeat, open the **Field Service Admin** app from the Field Service app menu. Click the Field Service Settings tab, then click **Scheduled Jobs**. Select the job and adjust the settings as needed. When the optimizer is active, a status bar appears on the left-hand side of the Field Service Settings page.

To manually run the optimizer — for instance, for a particular geographical area using a certain scheduling policy — click **Optimize** in the Service drop-down menu on the Gantt chart and define your settings.

Note:

- A message displays at the top of the Gantt when the optimizer is running.

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

- If you deactivate the optimization user, the optimization will fail.

Create a Field Service Lightning Optimization User

To activate the scheduling optimizer, you create an optimization profile and optimization user. You then log in as the optimization user to complete activation.

Create an FSL optimization profile, create an optimization user, and then log in as the user and activate the optimization.

IN THIS SECTION:

[Create a Field Service Lightning Optimization Profile](#)

After activating the optimizer, create an optimization profile.

[Create an Optimization User](#)

After creating an optimization profile, create an optimization user.

[Log In as the Optimization User and Activate Optimization](#)

Once creating an optimization profile and a user, log in to active optimization.

SEE ALSO:

[Schedule Optimization with the Field Service Lightning Managed Package](#)

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- "Customize Application"

To assign a permission set license:

- "Manage Users"

To create a permission set:

- "Manage Profiles and Permission Sets"

Create a Field Service Lightning Optimization Profile

After activating the optimizer, create an optimization profile.

1. Select a standard platform user profile from **Setup > Manage Users > Profiles**, and then click **Clone**.
2. Set the profile name to *FSL Optimization*. You must use this name.
3. Set the following settings.
 - Custom App settings—Remove all settings, except **Field Service**.
 - Tab settings—Hide all tabs, except **Field Service Settings** – Default On.
 - Administrative permissions
 - Enable **API Enabled**.
 - Enable **Chatter Internal User**.
 - Enable **View Help Link**.
 - Enable **Allow View Knowledge**.
 - Disable all remaining fields.
 - Standard Object permissions—Remove all permissions from all objects.
 - Custom Object permissions—Keep defaults (no permissions).
 - Field Service app—**Visible**.
 - Field Service Settings tab—**On** (the default).
 - Enabled Visualforce Page Access—**Vf066_settings**, and remove all other settings.
 - Enabled Apex Class Access—Include **OAASRestService** and **AuthServices**, and remove all other settings.
4. Click **Save**.

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USER PERMISSIONS

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- “Customize Application”

To assign a permission set license:

- “Manage Users”

To create a permission set:

- “Manage Profiles and Permission Sets”

Create an Optimization User

After creating an optimization profile, create an optimization user.

1. Select **Setup** > **Company Profile**, and then click **Company Information**.
2. Find your Salesforce Org ID, and copy the 15-character string to your clipboard.
3. Select Setup Manage Users, and then click **New User**.
4. Set the following values.
 - First Name—Leave blank.
 - Last Name—Enter *FSL Optimization*.
 - Alias—Enter *optUsr*.
 - Email—Enter the email address where you can receive the activation email.
 - Username—This name must follow this format: *FSL.[org id]+@[domain.name]*. For example, if your org ID is "00D58000000Plve" and your domain name is "optimization.com," enter *fsl.00D58000000Plve@optimization.com*.
 - Nickname—Accept the default.
 - Role—Select **None Specified**.
 - User License—Select **Salesforce License**.
 - Profile—Enter *FSL Optimization*.
 - Select **Generate new password and notify user immediately**. Make sure this option is selected.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To enable Field Service Lightning managed package:

- "Customize Application"

To assign a permission set license:

- "Manage Users"

To create a permission set:

- "Manage Profiles and Permission Sets"

Log In as the Optimization User and Activate Optimization

Once creating an optimization profile and a user, log in to active optimization.

1. When you receive a password reset email, click the link and complete the steps to log in to your org as the optimization user.
2. When logged in, click the + icon to see a list of all your tabs.
3. Click the **Field Service Settings** tab.
4. Select **Optimization > Activation**.
5. Click **Activate Optimization**.
6. To allow remote site access and be redirected back to the Settings tab, click **Allow**.

After you complete these steps, the scheduling optimizer operates in your org. You can log out as the optimization user and log back in with your regular username and password.

 **Note:** If you deactivate the optimization user, scheduling optimization no longer operates.

Fix Scheduling Overlaps

Reschedule appointments that overlap another appointment or an absence with the click of a button.

Configure Fix Overlaps for dispatchers on the Field Service Settings tab.

From the Field Service Settings tab go to **Scheduling > Dynamic Gantt > Fix Overlaps**. There are four settings.

1. **Automatically fix overlaps when an appointment overlaps with another appointment or absence:** When enabled, Fix overlaps is triggered whenever an appointment overlaps with another appointment or an absence.
2. **When attempting to fix overlaps:**
 - a. **Schedule to original resource only:** When selected, only the original assignee is considered when rescheduling the appointments.
 - b. **Schedule to all resources:** When selected, the scheduling engine considers other resources as well.
3. **After unscheduling services reschedule them by:**

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- “Customize Application”

To assign a permission set license:

- “Manage Users”

To create a permission set:

- “Manage Profiles and Permission Sets”

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

- a. Chronological Order
 - b. Priority
4. When unable to find a valid schedule for an appointment:
- a. Leave on Gantt and set in-jeopardy: If the scheduling engine can't reschedule without breaking work rules, the appointment is left in its original time and an in-jeopardy flag is raised.
 - b. Unschedule the appointment (s): If the scheduling engine can't reschedule without breaking work rules, the appointment is unscheduled and removed from the Gantt chart.
 - c. Reshuffle other assignments: If the scheduling engine can't reschedule without breaking work rules, the scheduling engine reshuffles the appointment. Reshuffling means moving around, or even unscheduling, lower priority appointments to make room for a higher priority appointment. More information.

Considerations for Fix Overlaps

- Fix overlaps respects the order of the original plan so the earliest appointment remains the earliest and the last remains last.
- If a service is pinned, fix overlaps can't move it. However, fix overlaps don't respect pinned statuses and can move appointments in one of the pinned statuses.
- Fix overlaps only reschedules for the given day. If fix overlaps is progressing to a reshuffle operation it may schedule to other days as well.
- Fix overlaps isn't supported for capacity based resources.
- Fix overlaps leaves the appointments in their original status.
- When a service appointments is scheduled by a fix overlaps operation, the `Schedule Mode` on the Service appointments is **Automatic**.

Fill-In Schedule Gaps for Service Resources

Fill-in schedule creates a list of appointments for a technician and finds the optimal schedule.

The first step of the Fill-in Schedule operation is to build a pool of available jobs for the scheduling engine to try to schedule ('candidates service appointments'). A consideration when building the pool is which Service Appointments should be selected as candidates and which should not. Some jobs shouldn't be considered as a candidate, per the service organization definitions (example: for break fix, it may require to book an appointment with the customer over the phone before sending a technician onsite). As the definitions could be related to the service appointment itself and/or the parent of the service appointment, the scheduling engine will evaluate a checkbox field on the parent record and another checkbox field on the service appointment level.

3 new fields were introduced through the managed package in this release all named 'Is Fill In Candidate', but are on different objects - Service Appointment, Work Order and Work Order Line Item. The default value for these field is TRUE, meaning that by default every service appointment is a candidate for Fill-In Schedule. If the service organization wants to control which appointment should be a candidate and which should not they can do one of the following

- Automation: using Process Builder or Apex Triggers, set the value of the field(s) to False if the record fails to meet the needed criteria.
- Formula Fields: create a new checkbox formula field(s) that evaluate if that record should be a candidate, and change the settings that controls which fields the scheduling engine evaluates when building the pool of candidates, to use your custom formula field(s) instead of the default 'Is Fill In Candidates' fields (see below)

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Fill-in Schedule)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

1. **Service Appointment Candidate Boolean field** Select a checkbox field that indicates if a service appointment is a candidate for fill-in schedule. You can select any standard or custom checkbox field from the service appointment object, including formula fields.
2. **Work Order Candidate Boolean field** In the case of Work Order as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.
3. **Work Order Line Item Candidate Boolean field** In the case of Work Order Line Item as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order line item object, including formula fields.
4. **Order candidate appointments by (picklist)** Select either Priority or Distance.
 - a. **Priority** - the scheduling engine will first sort the candidates based on their priority field (as defined in the Scheduling>General Logic settings) starting from the highest priority. Distance will be also considered when sorting, but as a secondary consideration (meaning starting with the closest service appointment when 2 Work Orders have the same priority)
 - b. **Distance** - The scheduling engine will first sort the candidates based on their proximity to the previous Appointment (or in case it is the first assignment of the day, their proximity to the technician home base). After a Service Appointments get scheduled, the scheduling engine will consider its location as the point for distance calculation. Priority will be also considered when sorting, but as a secondary consideration (meaning starting with the Work Order with higher priority, when 2 Service Appointments are in the same proximity)
5. **Max appointments to schedule (number)** When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after finding this number of appointments (or after the max runtime settings, what ever is first). Max value to set is 50 candidates.
6. **Max runtime (seconds) (number)** When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after this number of seconds (or after the max appointments to schedule settings, what ever is first). Max value to set is 60 seconds.

Considerations for Fill-In Schedule

- Fill-in schedule will only try to schedule for the given day (first day shown on the Gantt).
- The Is Fill In Candidate fields on the service appointment, work order and work order line items default value is True. This means any new service appointment will be considered as a fill in candidate, while service appointment records that existed prior to the upgrade will not be considered as candidates. The admin can use Process Builder to control these fields to fit your organization fill in schedule needs, or even create new formula fields that will evaluate in real time whether the record should be a candidate or not.
- Service Appointments without geolocation will be sorted last if sorting by distance.
- Candidate Service Appointments are only ones that are unscheduled or scheduled for the future (day after and onward).
- When a Service Appointments was scheduled by Fill-in Schedule operation, the 'value for the Schedule Mode' field on the Service appointments will be 'Automatic'.

Group Nearby Appointments

Group nearby appointments that are close to a given appointment.

Group nearby appointments un-schedules the appointments that are scheduled later that day and, after building a pool of near by service appointments, it schedules appointments close to the source appointment.

 **Note:** Lower priority work may be unassigned to make room for the nearby appointments.

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Group Nearby Appointments)

1. Service Appointment candidate Boolean field Select a checkbox field that indicates if a service appointment is a candidate for group nearby appointment. You can select any standard or custom checkbox field from the service appointment object, including formula fields.
2. Work Order Candidate Boolean field In the case of Work Order as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.
3. Work Order Line Item Candidate Boolean field In the case of Work Order Line Item as an appointment's parent - this field should be true for the service appointment to be a candidate. You can select any standard or custom checkbox field from the work order object, including formula fields.
4. Max appointments to schedule (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after finding this number of appointments (or after the max runtime settings, what ever is first). Max value to set is 50 candidates.
5. Max runtime (seconds) (number) When building the pool of candidates service appointments, the scheduling engine will stop looking for more candidates after this number of seconds (or after the max appointments to schedule settings, what ever is first). Max value to set is 60 seconds.
6. When attempting to schedule an appointment near other appointment, the Group Nearby appointment operation first un-schedules the services that were planned for the resource for the remainder of the day. The operation continues with building a pool of surrounding appointments and scheduling these to the resource. The last step is to try and schedule the appointments that were un-scheduled in the first step of the operation. There are two options in the picklist:
 - a. Schedule to original resource only - when selected, only the original assignee will be considered as a candidate when the scheduling engine will try to reschedule the appointments
 - b. Schedule to all resources - When selected, the scheduling engine will consider other resources as well
7. When unable to arrange schedule (picklist) There are 3 options in the picker:
 - a. Leave on Gantt and set in-jeopardy - If the scheduling engine couldn't reschedule without breaking work rules, the appointment will be left in it's original time, and an in-jeopardy flag will be raised.
 - b. Unschedule the appointment(s) - If the scheduling engine couldn't reschedule without breaking work rules, the appointment will be un-scheduled. I.e removed from the Gantt.
 - c. Reshuffle other assignments - if the scheduling engine couldn't reschedule without breaking work rules, the scheduling engine will then try to reshuffle the appointment (Reshuffle means moving around (or even un-scheduling) lower priority appointments to make room for a higher priority appointment to be scheduled. More information on Reshuffle process in section 'Appointments Reshuffle')
8. Radius for nearby appointments (number) The radius around the originating service appointments where other appointments are considered to be candidates for the Group Nearby Appointments operation. The distance unit can either be Km or Mile, depending on the 'default driving speed unit' defined under the Routing settings (Field Service Settings tab>Scheduling>Routing)

Considerations for Group Nearby Appointments

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

- Group Nearby Appointments will only try to schedule for the given day (first day shown on the Gantt).
- The Is Fill In Candidate fields on the service appointment, work order and work order line items default value is True. This means any new service appointment will be considered as a fill in candidate, while service appointment records that existed prior to the upgrade will not be considered as candidates. The admin can use Process Builder to control these fields to fit your organization fill in schedule needs, or even create new formula fields that will evaluate in real time whether the record should be a candidate or not.
- Only unscheduled Service Appointments can be candidates for Group Nearby Appointments.
- When a Service Appointments was scheduled by Group Nearby Appointments operation, the 'value for the Schedule Mode' field on the Service appointments will be 'Automatic'.

Reshuffle Appointments to Schedule High Priority Work Over Lower Priority Jobs

When your schedule has no room for that high priority job, Appointments Reshuffle moves lower priority jobs to a later date or un schedules them. This frees up your technician for the more important job.

Settings: (Field Service Settings tab>Scheduling>Dynamic Gantt>Reshuffle Assignments)

1. Max time horizon (days) in which the appointment can be scheduled The Reshuffle process will try to schedule the appointment in a date range which is the Earliest Start PErmitted (or the current time if it is later) up until X more days (where x is the value configured here). Seven is the maximum value.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Enable Single Resource Optimization

Get a handle on last-minute schedule changes with Resource Schedule Optimization. Every night before the day of service begins Global Optimization runs and creates the optimal schedule for all the resources. Sometimes, jobs get canceled, resources run late, and emergency jobs come in. Resource Schedule Optimization is a quick, intelligent way to optimize an individual resource's schedule and get the optimal route based on the changes.

Resource Schedule Optimization will quickly optimize a single technician schedule without affecting other technicians schedule.

1. In the Field Service Admin app, go to the Field Service Settings tab.
2. Click **Optimization > Logic > Resource Schedule Optimization**.
3. Define your pinned statuses.

Pinned statuses are statuses that Resource Schedule Optimization doesn't alter in the optimization process. It is recommended that the Dispatch status isn't pinned, so dispatched work can be moved when a previous job runs late or when emergency work is needed.

Resource Schedule Optimization Considerations

- Resource Schedule Optimization doesn't support capacity based resources.
- Complex work information that's not fully available in the optimization data is considered pinned. For example a partial chain of a complex work dependency.
- Resource Schedule Optimizations can't run in parallel for the same resource on the same time interval.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To configure the Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

To see the Resource Schedule Optimization on the Gantt:

- Resource Schedule Optimization custom permission

Dispatch Policies in the Field Service Lightning Managed Package

Manage how field service technicians receive jobs, either one at a time, hourly, daily, weekly, or monthly.

You can determine how far out appointments can or must be made. You can enable drip feed, which dispatches service appointments to technicians as they finish current appointments. You can set for each territory or enterprise-wide.

SEE ALSO:

[Sharing for the Field Service Lightning Managed Package](#)

Sharing for the Field Service Lightning Managed Package

You can limit access to field service objects so that your service team members only see information relevant to them. Field Service Lightning includes out-of-the-box sharing tools to give team members access to the right information. For these tools to function, you need to change objects' default Public Read/Write sharing settings.

1. Select **Setup** > **Security Controls** > **Sharing Settings**.
2. Change the sharing settings for the for the Work Order, Service Appointment, Service Territory, and Service Resource objects to **Private**.
3. Click **Save**.

You can also give dispatchers access to the objects they need by sharing information across territories and syncing calendars to include absences and other events.

To change sharing rules for the Appointment object, you must change the service appointment lifecycle. When a service is created and assigned, the service is visible only to the record's creator and relevant dispatchers based on user-location sharing. When you change a dispatching service's status to Dispatched, the record is shared with the user of the assigned resource.

 **Note:** When a service is canceled, all sharing rules are removed, and the service is visible only to the service owner and the relevant dispatchers based on the User-Location object.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Customize the Dispatcher Console with Field Sets

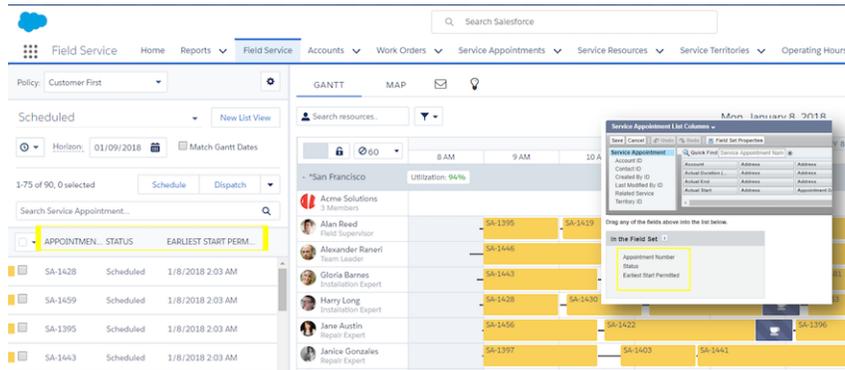
The Field Service Lightning Managed Package uses Fields Sets as a tool for administrators to control which fields appear on some of the Visualforce pages of the managed package. This allows administrators to change the default setup of the information displayed on some key UI elements. For example, by changing a field set the admin can select which fields will appear as columns in the Dispatcher console service Appointment list.

Note: Field sets in the Field Service Lightning managed package Number, Text, Date , DateTime, Formula. Currency, and Reference (lookup), fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Important: Supported field types in Field Service Lightning field sets are Number, Text, Date , DateTime, Currency, and Reference(Lookup Fields).

Service Appointment Field Sets

Field Set	Description	Placement in Dispatcher Console
Service Appointment List Columns	Controls the fields that appear on the appointment list columns. Up to six fields can show up as a service list column.	

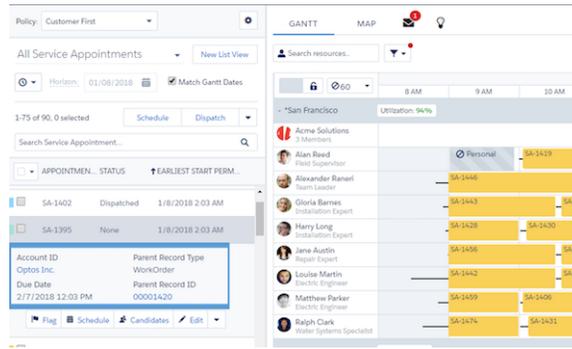
Field Set

Description

Placement in Dispatcher Console

Service Appointment Expanded

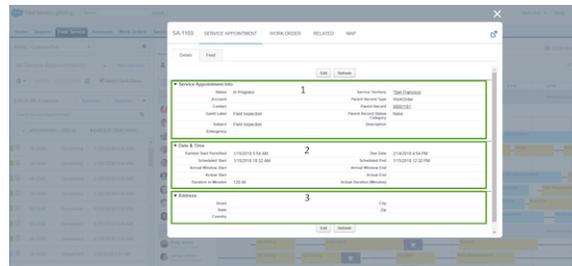
Controls the mini layout displayed when the user clicked on an appointment on the list. Up to 12 fields can show up on the mini layout.



Service Lightbox

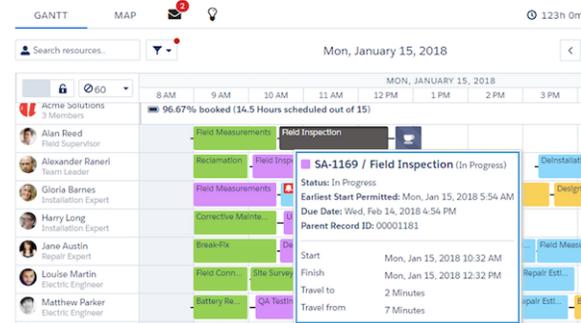
The below Field Sets control the layout of the dialog screen displayed when the user is double clicking on an appointment on the Gantt.

- Service Lightbox
- Service Lightbox Time
- Service Lightbox Address



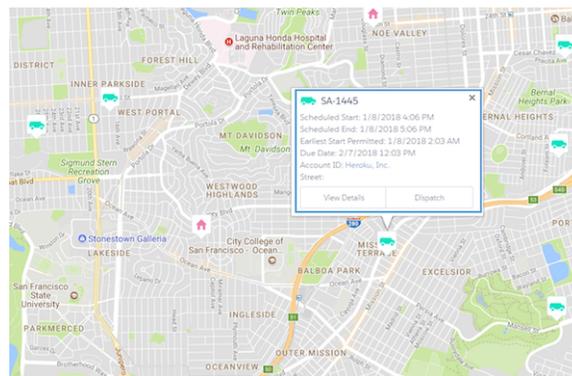
Service Tooltip Gantt

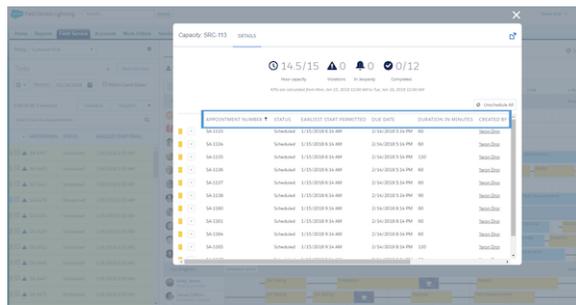
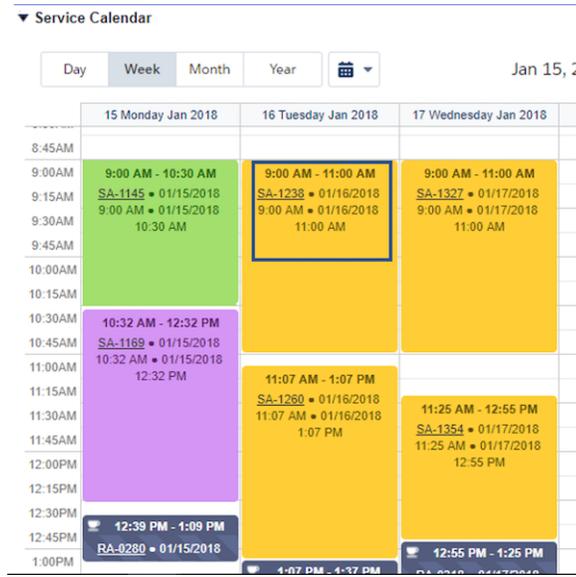
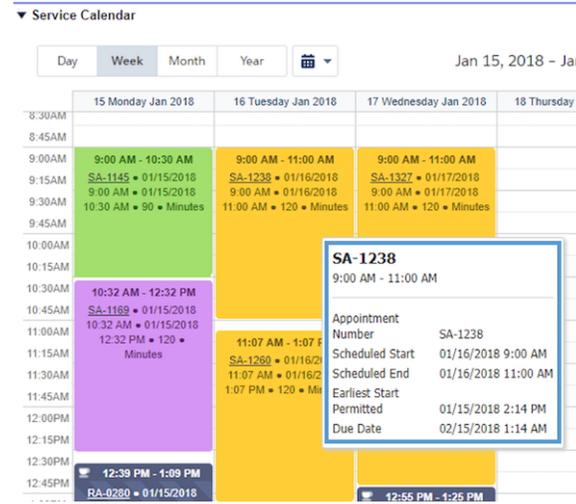
Controls the tooltip layout when hovering above an appointment on the Gantt.

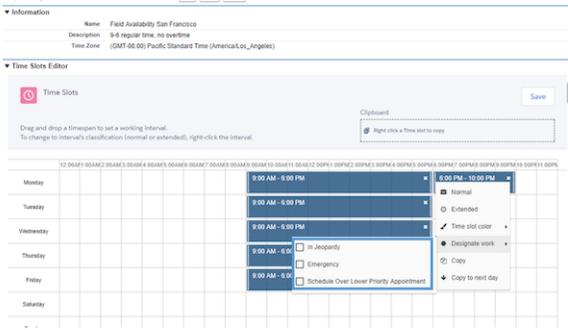


Service Info Window Map

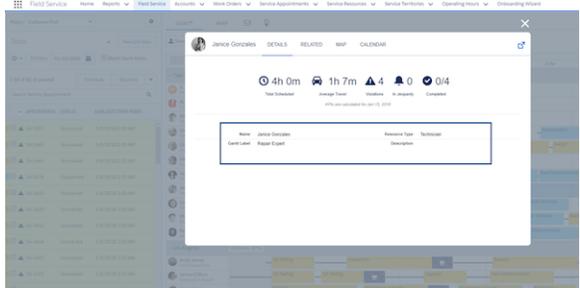
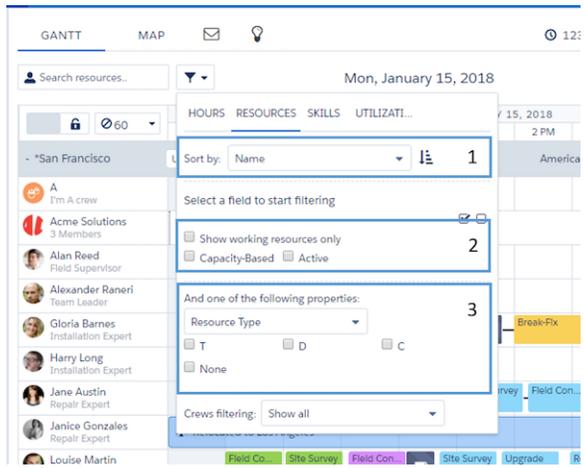
Controls the layout of the dialog screen displayed when the user is double clicking on an appointment on the map.

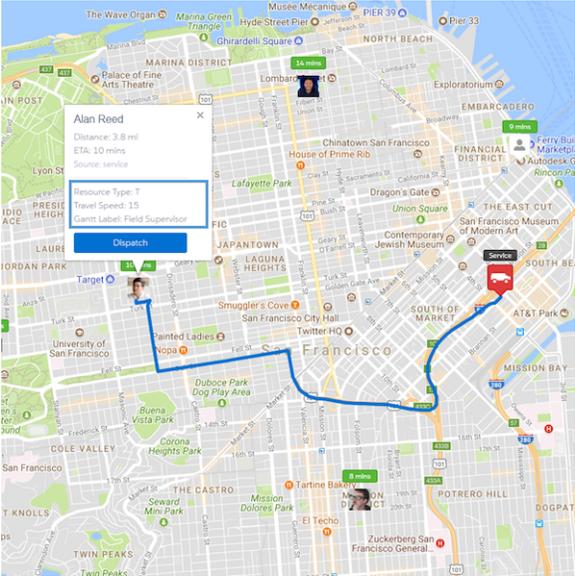
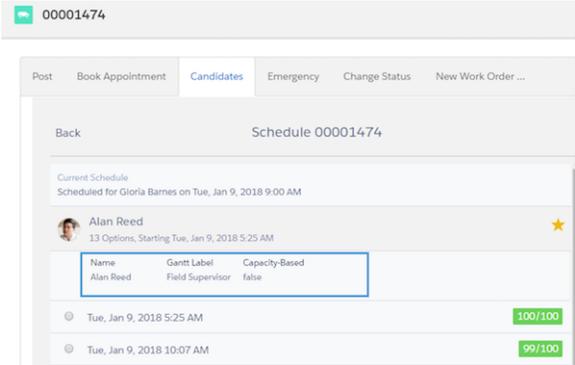


Field Set	Description	Placement in Dispatcher Console
Capacity Service Columns	Controls the column headers on the dialog screen which opens when double clicking a capacity record on the Gantt. Up to nine fields can show up as a capacity service column.	
Service Appointment Resource Calendar Display	Controls the fields displayed on the appointments on the service resource calendar Visualforce page.	
Service Appointment Resource Calendar Tooltip	Controls the fields displayed on the tooltip when you hover over an appointment on the service resource.	

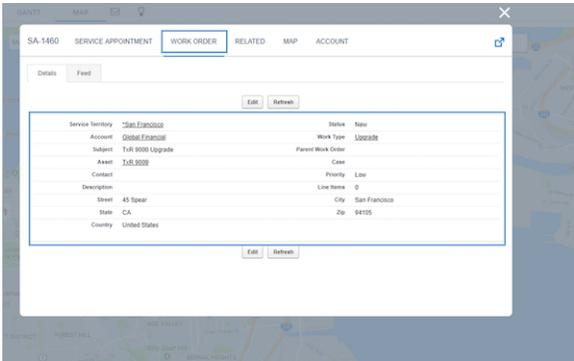
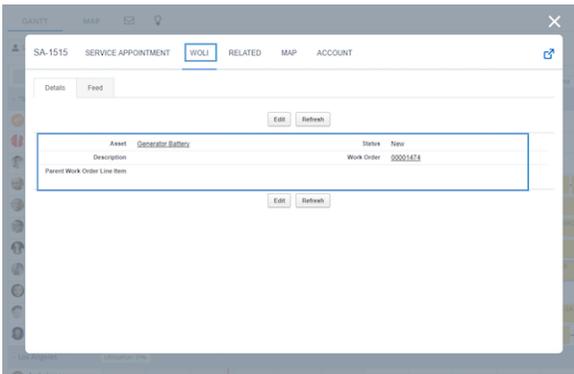
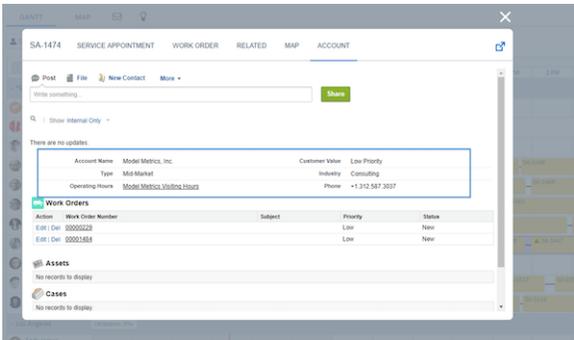
Field Set	Description	Placement in Dispatcher Console
Designated Work Fields	Controls the available fields when defining a time slot as a designated time slot from the time slots editor Visualforce page on the operating hours record.	

Service Resource Field Sets

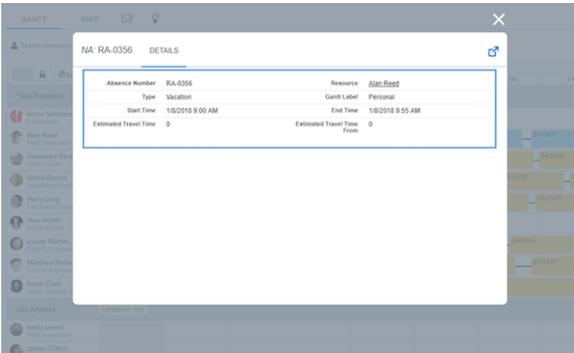
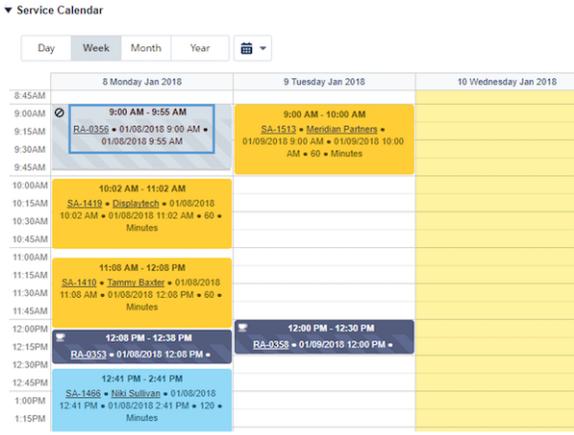
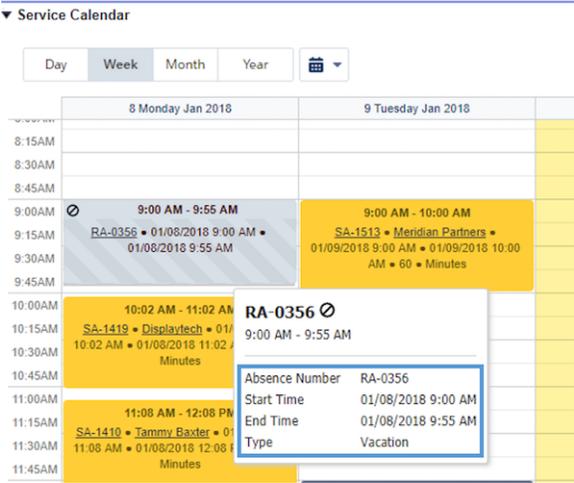
Field Set	Description	Placement in Dispatcher Console
Resource Lightbox	Controls the layout of the dialog screen displayed when the user is double clicking on a service resource on the Gantt.	
Resource Gantt Filter	Controls the available fields on the Gantt Resource Filters. The fields are available in: <ul style="list-style-type: none"> • Sort by picklist • Checkbox filters (if the field is of type checkbox) • One of the following properties picklist (if the field is of type Picklist) 	

Field Set	Description	Placement in Dispatcher Console
Emergency Fields	Controls the fields displayed on the service resource in the emergency chatter action.	 <p>The image shows a map of San Francisco with a blue route highlighted. A callout box for 'Alan Reed' is visible, displaying the following information: Distance: 3.8 mi, Travel Speed: 35, ETA: 10 mins, Source: service, Resource Type: T, Gantt Label: Field Supervisor, and a 'Dispatch' button.</p>
Get Candidates Resource Details	Controls the fields which appear when expanding a resource row on the candidates chatter action.	 <p>The image is a screenshot of the Dispatcher Console interface. At the top, it shows the ID '00001474'. Below this, there are tabs for 'Post', 'Book Appointment', 'Candidates', 'Emergency', 'Change Status', and 'New Work Order...'. The 'Candidates' tab is active, showing a 'Schedule 00001474' for 'Gloria Barnes on Tue, Jan 9, 2018 9:00 AM'. Underneath, a candidate 'Alan Reed' is listed with '13 Options, Starting Tue, Jan 9, 2018 5:25 AM'. A callout box highlights the following fields: Name (Alan Reed), Gantt Label (Field Supervisor), and Capacity-Based (false). Below this, two time slots are shown: 'Tue, Jan 9, 2018 5:25 AM' with a capacity of '100/100' and 'Tue, Jan 9, 2018 10:07 AM' with a capacity of '99/100'.</p>

Gantt Lightbox

Field Set	Description	Placement in Dispatcher Console
Work Order	Controls the layout of the dialog screen displayed when the user is double clicking on an appointment on the Gantt, and clicks on the Work Order tab (when the service appointment parent is a work order).	
Work Order Line Item	Controls the layout of the dialog screen displayed when the user is double clicking on an appointment on the Gantt, and clicks on the WOLI tab (when the service appointment Parent is a Work Order Line Item).	
Account	Controls the layout of the dialog screen displayed when the user is double clicking on an appointment on the Gantt, and clicks on the account tab.	

Resource Absence Field Sets

Field Set	Description	Placement in Dispatcher Console
Resource Absence Lightbox	Controls the layout of the dialog screen displayed when the user is double clicking on a resource absence on the Gantt.	
Resource Absence Resource Calendar	Controls the fields displayed on the absences on the service resource calendar Visualforce page.	
Resource Absence Calendar Tooltip	Controls the fields displayed on the tooltip when you hover over an absence on the service resource calendar Visualforce page on the Service Resource record.	

 **Note:** Field sets in the Field Service Lightning managed package Number, Text, Date, DateTime, Formula, Currency, and Reference (Lookup), fields.

Gantt Live Update (Beta)

The Dispatcher Console Gantt refreshes itself every according to what's defined in your Field Service Settings. With Gantt Live Update you can use Streaming API and Push Topics, so that relevant changes are reflected immediately on the Gantt.

To learn more about the streaming API and push technology, see the [Streaming API Developer Guide](#).

 **Important:** This release contains a beta version of Gantt Live Updates that is production quality but has known limitations. To provide feedback and suggestions, contact Salesforce.

To enable Gantt Live Update in your org:

1. [Update Sharing Settings](#)
2. Optionally, [Update Push Topics](#)
3. [Enable Gantt Live Update](#)
4. [Grant Access](#)
5. [Enable for Admins](#)

Update Sharing Settings

To ensure your dispatchers only receive notifications for the data they have access to, specific objects need to be defined as Private in your Org-wide Sharing Settings. Navigate to **Field Service Settings > Dispatcher Console UI > Updating the Gantt**. View the current status of these objects, and make any necessary changes.

Update Push Topics

Push topics are used to send event notifications on specified objects, fields, and criteria. The Field Service Lightning Managed Package creates push topics for:

- Service Resource
- Resource Absence
- Service Appointment
- Assigned Resource
- Service Resource Capacity
- FSL Operation
- Optimization Request

Make any necessary changes to your Gantt Field Sets, see [Customize the Dispatcher Console with Field Sets](#).

If push topics aren't created, click **Update push topics** on the Updating the Gantt dialog.

Enable Gantt Live Update

From the Field Service Admin app, Field Service Settings, go to **Dispatcher Console UI > Updating the Gantt** click **Gantt Updates are Enabled Org Wide** and then **Save**.

Grant Gantt Live Update Access

Give selected dispatchers the Streaming API custom permission.

 **Note:** Dispatchers without the Streaming API custom permission get timed updates on the Gantt, as defined in your settings

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To configure the Field Service Lightning managed package:

- [Customize Application](#)

To assign a permission set license:

- [Manage Users](#)

To create a permission set:

- [Manage Profiles and Permission Sets](#)

To see live updates for the Gantt:

- [Streaming API custom permission](#)

Enable for Admins

Gantt live update access isn't automatically available to all admins. If too many update requests are sent to the client, the Gantt chart could crash. After you've warned your admins of the risk, enable Gantt Live Updates for selected admins.

From the Field Service Admin app, Field Service Settings, go to **Dispatcher Console UI > Updating the Gantt** click **Allow admins to use Gantt Updates** and then **Save**.

Field Service Lightning Dispatcher Console

The Field Service Lightning Managed Package includes the Dispatcher Console, which is the main working space for dispatchers.

From the Field Service tab, the Dispatcher Console contains the appointments list, the resources Gantt chart, the map, and other features.

IN THIS SECTION:

[Search in the Dispatcher Console](#)

Field Service Lightning offers search options for both the Service list and the Resource list.

[Dispatcher Console Service Appointment List](#)

The Service Appointment list is located on the left side of the dispatcher console and contains a list of relevant appointments. Users can filter, sort, and search within the list. You can also perform actions on selected services in the list.

[Dispatcher Console Gantt](#)

The Gantt is located on the right side of the Dispatcher Console and contains the resource list, the schedule view, and additional features.

[Dispatcher Console Map](#)

The map displays the location of appointments from the service appointments List, the resource's home base, and the resource's last known position.

[Scheduling Policy Picker](#)

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. The scheduling policy you select will be used in every scheduling action.

[Managing Service Resources](#)

Resources represent technicians that are assigned to complete a service appointment.

[Service Crews in the Dispatcher Console](#)

If service crews are enabled in the Field Service Lightning managed package, the Resource Gantt displays service resources of type Crew and service crew members.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Search in the Dispatcher Console

Field Service Lightning offers search options for both the Service list and the Resource list.

IN THIS SECTION:

[Search the Dispatcher Console Service Appointment List](#)

You can search for appointments from the service appointment list.

[Search the Dispatcher Console Resource List](#)

You can search for a resource from the service resource list.

Search the Dispatcher Console Service Appointment List

You can search for appointments from the service appointment list.

To search for an appointment in the service appointment list, enter at least two characters in the list search box.

The search process takes into account the following service appointment fields:

- Service Appointment Number
- Gantt Label
- Account Name
- Assigned Resource Name
- Service Appointment ID
- Service Territory Name
- SA Status
- Fields in the Service Appointments List Columns field set that are of the following types: text, text area, lookup name, and picklist

You can search using more than one keyword by separating each keyword with a comma (OR logic condition is applied on all search items).

After you enter two characters in the search box, the service list is filtered to list only service appointments that have at least one matched property with the entered value.

EDITIONS

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Search the Dispatcher Console Resource List

You can search for a resource from the service resource list.

To search for a resource on the service resource list, type at least one character into the search box.

The search process filters based on the resource name.

You can also use the Gantt Filter to filter resources by additional options, including their skill set or by any checkbox or picklist field included in the filter field set.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Dispatcher Console Service Appointment List

The Service Appointment list is located on the left side of the dispatcher console and contains a list of relevant appointments. Users can filter, sort, and search within the list. You can also perform actions on selected services in the list.

To change the order of the bulk action buttons in the service list, navigate to Dispatcher Settings and select Bulk actions order. Then, drag and drop the actions to fit your preference.

You can use field sets to control:

- Which fields appear in the service list
- Which fields appear when viewing a single service within the service list

You can also drag fields in the list to adjust their width and reveal additional fields.

EDITIONS

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IN THIS SECTION:

[Dispatcher Console Scheduling Horizon](#)

The Scheduling Horizon takes into account the selected date properties, and shows the relevant appointments up to and including the horizon date.

[Dispatcher Console Service Appointment List Views](#)

List Views control which service appointment are shown in the list on the left hand side of the FSL dispatcher console. The filtered service appointments also depend on the dates chosen (horizon and date fields) and search values.

[Dispatcher Console Service List Search](#)

Use keywords to filter service appointments.

[Dispatcher Console Service List Customization](#)

You can customize service lists.

[Dispatcher Console Appointment List Bulk Actions](#)

You can perform mass actions on an appointment list.

Dispatcher Console Scheduling Horizon

The Scheduling Horizon takes into account the selected date properties, and shows the relevant appointments up to and including the horizon date.

For example:

- **Number of services to show:** 500 (amount configurable)
- **Selected date property:** Due Date
- **Scheduling horizon:** 05/30/2015

If you select **Match Gantt Dates**, this changes the scheduling horizon to match the dates the Gantt shows.

Dispatcher Console Service Appointment List Views

List Views control which service appointment are shown in the list on the left hand side of the FSL dispatcher console. The filtered service appointments also depend on the dates chosen (horizon and date fields) and search values.

Below are the predefined list views. All list views consider Status category and there conditions have an "OR" statement between them.

- Todo
 - Status category - None
 - Rule violations
 - In Jeopardy service appointments which are not Canceled or Completed
-  **Note:** The Todo filter shows services that are waiting for the dispatcher's next action. For example: unscheduled services, services with a rule violation, services in jeopardy, etc.
- All Service Appointments
 - Yes, all of them
- Selected
 - Only service appointments which the user selected on the list.
- Flagged
 - Only service appointments which the user marked as flagged - notice flagged services are not saved between sessions.
- Recent
 - Service appointments which were recently interacted with: schedule, drag, post to chatter, change status, get candidates, show on gantt, open details.
-  **Note:** Recently used services are not saved between sessions.
- Unscheduled

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- Service appointments without any assigned resource and are not canceled.
- Rules Violating
 - Service appointments with rule violations and are not canceled.
- In Jeopardy
 - Service appointments marked as in jeopardy and are not canceled.
- Scheduled
 - Service appointments with an assigned resource.
- Gantt
 - Service Appointments which are currently on the Gantt chart view; assigned and between the viewable times.
-  **Note:** The Gantt filter shows the same services seen on the Gantt.
- Contractors
 - This view will show only service appointments which are scheduled to a capacity based resources.
- Canceled
 - Service appointments with status category canceled.

IN THIS SECTION:

[Create Custom Filters with the Field Service Lightning Managed Package](#)

Custom Filters allow you to filter the appointment list in a similar way to the list views you are familiar with in Salesforce. Choose which service appointment fields to use as criteria and add your own logic. Easily determine a time period to filter aervice appointments. Allow dispatchers to create their own private filters and share them with others.

Create Custom Filters with the Field Service Lightning Managed Package

USER PERMISSIONS	
To configure the Field Service Lightning managed package:	Customize Application
To assign a permission set license:	Manage Users
To create a permission set:	Manage Profiles and Permission Sets
To create, edit, and delete custom filters:	FSL Dispatcher or FSL Admin Permissions AND Create Filter custom permission
To share personal custom filters and edit and hide public custom filters:	FSL Dispatcher or FSL Admin Permissions AND Create Filter custom permission AND Publish Filter custom permission

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Custom Filters allow you to filter the appointment list in a similar way to the list views you are familiar with in Salesforce. Choose which service appointment fields to use as criteria and add your own logic. Easily determine a time period to filter service appointments. Allow dispatchers to create their own private filters and share them with others.

 **Tip:** If only certain users should have access to a specific custom filter, share the custom filter record with the relevant public group or individuals.

For example, if only San Francisco dispatchers should access the “Bay Area Emergency Work” custom filter, create the custom filter as private (not published) and share “Bay Area Emergency Work” with the San Francisco public group by using standard sharing.

All users have access to the standard filters provided with the Field Service Lightning managed package. If required, you can hide these standard filters as well. Remove the relevant custom permission from the user profile or assigned permission set.

1. To enable custom filters, go to the Field Service Admin app, Field Service Settings tab. Click **Dispatcher Console UI**, and then select **Enable Custom Filters**.

 **Note:** This feature replaces the existing custom list view functionality. Therefore, all existing custom list views aren't accessible once custom filters are enabled.

2. Go to the dispatchers console in the Field Service app, Field Service tab.
3. Click the down arrow next to the current filter name and select **New**.
4. Add a name and description to your custom filter.
5. Select whether the filter displays service appointments according to the number of days before and after the Horizon Date, or service appointments currently displayed on the Gantt chart (similar to the Gantt standard filter).

 **Note:** The horizon date takes into account the selected date properties, Earliest Start Permitted, Due Date, Arrival Window Start, Arrival Window End, Scheduled Start, and Scheduled End.

- Standard filters let you set the scheduling window limit, the number of days up to and including the selected horizon date. The default value is 14 days.
- Custom filters let you set how many days before and after this date should be displayed.

6. Add criteria to your filter.

 **Note:** The available fields are on page layout of the Gantt filter service appointment field set. Only standard and custom service appointment fields are supported, related object fields are not supported.

7. To filter service appointments that are causing rule violations, add the Rule Violations criteria to your filter. To exclude rule violators, add Rule Violations Equals False. To include rule violators, add Rule Violations Equals True.
8. Adjust [filter logic](#).

 **Tip:** To dynamically consider date and time fields, use formula fields. For example, Due date in 2 days Equals True.

9. To publish or share your filter, check **Make this filter available for all users**.

When a custom filter is made public, it is shared with the All Internal Users public group.

10. Click **Save**.

11. To hide a public custom filter, click the down arrow next to the filter and select **Hide**.

 **Note:** Admins can expose hidden filters by editing the custom filter record itself and setting Hidden to false.

Custom Filter Considerations

- Maximum days before and after the horizon date is 30 days.
- We recommend keeping the number fields included in the Gantt Field Set page layout below 15, as too many fields can cause a degradation in performance.

Dispatcher Console Service List Search

Use keywords to filter service appointments.

Use the Appointment List Search to filter appointments displayed on the list by keywords. You can search for many keywords by separating each word with a comma (applying the AND logic condition).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Dispatcher Console Service List Customization

You can customize service lists.

There are two components you can customize for the service list:

- **Appointment list columns:** Use the *appointment list columns* Field Set to configure which fields you want to appear at the service appointment list header. You can select up to 6 fields.
- **Appointment mini view:** When you click an appointment in the list, the row extends to expose the mini view. Use the *Appointment Expanded* Field Set to configure up to 12 fields you want to appear in the mini view.

The appointment list and mini view are responsive, so expanding and reducing the width of the sidebar component will expose or hide fields to match the screen real estate available.

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Dispatcher Console Appointment List Bulk Actions

You can perform mass actions on an appointment list.

You can perform different mass actions on appointments in the list by opening the Actions menu and choosing an action. Available actions are:

- **Schedule:** Execute an automatic scheduling process for the selected appointments.
- **Change Status:** Change the status for the selected appointments.
- **Flag / Unflag:** Add or remove a flag for the selected appointments. You can use the flag for filtering later.
- **Unschedule:** Unschedule the selected appointments, or define the relevant time range and service territories of the appointments that should be unscheduled.
- **Optimize:** Turn on scheduling optimization.

The list of actions is customizable; you can remove some actions and edit the order based on your preference. Check out the Field Service Setting tab in the Field Service Admin app for more details.

Dispatcher Console Gantt

The Gantt is located on the right side of the Dispatcher Console and contains the resource list, the schedule view, and additional features.

- The resource list displays all active resources whose locations are selected in *territory Filtering*.
- The *Resource Filter* lets you control which resources appear in the Gantt.

You can customize which fields are available in the filter by editing the Resource Gantt Filter field set. Only picklists and checkbox fields can be added. Select **Show working resources only** in the filter box to show only resources who are scheduled to perform services in the calendar interval shown on the Gantt.

- The *Gantt Filter* lets you filter resources by skill, properties, and the hours/days displayed on the Gantt.
- The *notifications area* shows you details about scheduling actions that you took such as Schedule, Unschedule, etc.
- The *Lock Gantt* button lets you switch between a read-only and read/write view of the Gantt.
- The KPI Monitor gives you your schedule highlights, including the total work load, average travel time, number of completed services, number of rules violating services, and number of services which are In Jeopardy.
- The *Date view and Resolution* controls the date range that is displayed on the Gantt, and offers several options:
 - Jump to a specific date
 - Scroll one day to the left/right
 - Jump to Today
 - Gantt resolution: The number of days to display on the Gantt
- The *Territory's time zone* displays each territory's current date and time.
- If approval confirmation on resource absences is enabled, only approved absences appear on the Gantt.

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IN THIS SECTION:

[Dispatcher Console Option Button](#)

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

[Dispatcher Console Territory Filtering](#)

You can filter appointments by service territories.

[Dispatcher Console Gantt Chart Settings](#)

Customize your Gantt chart to display details you want to see.

Dispatcher Console Option Button

The Options button lets you customize the Gantt data and gives you access to viewing and other dispatcher console settings.

The Options button is located above the service appointment List and includes several settings:

- **Territory filtering:** Filter the locations seen on the Gantt.
- **Gantt Settings:** Configure the Gantt data set, behavior, and layout.
- **Open full screen:** Open the Dispatcher Console in full screen with four available tabs: Accounts, Services, Resources, and Absences.

Dispatcher Console Territory Filtering

You can filter appointments by service territories.

You can filter the locations displayed on the Gantt by clicking the Settings icon and then Service Territory filtering.

The selected service territories will be loaded with the relevant resources and service appointments.

 **Note:** Service territories that don't have resources assigned as territory members are shown on the appointment list but not on the Gantt chart.

- You can choose whether to **Show Service Appointments that aren't associated with a territory**. You will be able to schedule them to any of the loaded Service Territories.
- **Search Territories:** Use the search bar to filter out Service Territories.
- **All / None:** Use these buttons to quickly select all Service Territories or remove all selections.

If your mobile workers are assigned to more than one territory, you can view your mobile workforce secondary service territory memberships on the Gantt.

1. From the Field Service Admin app, click the Field Service Settings tab.
2. Click **Dispatcher Console UI** in the left-side panel.
3. In the Gantt Configurations tab, check the `Show secondary Service Territory Members on Gantt chart` check box.

EDITIONS

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4. Click **Save**.
5. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets** under Users.
6. Click **FSL Dispatcher Permissions**.
7. In the Apps section, click **Custom Permissions**.
8. Click **Edit**.
9. Add `FSL.View Resource on secondary STM` permission to the FSL Dispatcher permission set.
10. Click **Save**.

Secondary Territory Membership Considerations

- When you are using the Get Candidates action, the secondary territory membership candidate has a green mark to show it is not their primary territory.
- When you drag and drop service appointments on the Gantt, the time slots are filled on both of the service resource's rows.
- Territory utilization doesn't calculate secondary territory members.
- When Gantt visibility is back on timezones, only secondary territory membership with the same time zone are visible. If the primary is filtered out, the other secondary territory memberships are still visible.

Dispatcher Console Gantt Chart Settings

Customize your Gantt chart to display details you want to see.

To configure your Gantt chart settings, clicking the Settings icon, and then click **Dispatch console settings**.

- **Filter candidates after get slots action:** Show only resources that come up as candidates when using the Get Candidates service list or Gantt action.
 - When enabled, only the available resources for scheduling will be seen on the Gantt.
 - When disabled, all the resources will be seen on the Gantt without any filtering.
- **Scheduling horizon limit:** Set the number of days to show before the selected scheduling horizon.
- **Services per page:** Set the maximum number of services per page in the Service list. The available options are 50, 75, 100, 125, and 150.
- **Resource row height:** Set the height of the resources row in the Gantt. The available options are XSmall, Small, Medium, and Large.

EDITIONS

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IN THIS SECTION:

[The Gantt Filter](#)

Filter resources by skills and other features, and set hours and days to display on the Gantt chart.

[Run Single Resource Optimization](#)

Get a handle on last-minute schedule changes with Resource Schedule Optimization. Every night before the day of service begins Global Optimization runs and creates the optimal schedule for all the resources. Sometimes, jobs get canceled, resources run late, and emergency jobs come in. Resource Schedule Optimization is a quick, intelligent way to optimize an individual resource's schedule and get the optimal route based on the changes.

[KPI Monitor](#)

The KPI (Key Performance Indicator) monitor provides important insight on your services.

The Gantt Filter

Filter resources by skills and other features, and set hours and days to display on the Gantt chart.

The Gantt Filter in the top left lets you filter resources by their skills and other features. You can also set the available hours and days to display on the Gantt chart.

- The **Hours** filter lets you select a range of hours that you would like to see across all dates resolution (daily, 2 days, 3 days and weekly). It also lets you select whether to display weekends on the Gantt.
- The **Resources** filter lets you specify which resources are shown. Selecting a field activates the filter. You can customize which fields are available in the filter by editing the Resource Gantt Filter field set. Only picklists and checkbox fields can be added. In addition, you can select **Show working resources only** in the filter box to show only resources who are scheduled to perform services in the calendar interval shown on the Gantt.
- The **Skills** filter ensures that only resources with the selected skills are visible on the Gantt. A maximum of 20 resource skills are displayed.
- The **Monthly** filter lets you select how a resource's monthly capacity is calculated. Deselect any fields that you don't want to be included in the calculation.
- The **Priority** filter sorts the resources by highest priority service appointments.

By default the Gantt is being sorted by the resource name, ascending. You can add any field to the "Resource Gantt Filter" Field set on the Service Resources object, and it shows as an option on the Gant Filter settings under the Resources tab.

1. To add a new field to the selection, go to **Field Service > Service Resource > Field Sets**.
2. Edit the Field Set layout Fields.
3. Change to sort by the desired field.

 **Note:** Lookup fields are not supported. All other field type are supported.

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Run Single Resource Optimization

Get a handle on last-minute schedule changes with Resource Schedule Optimization. Every night before the day of service begins Global Optimization runs and creates the optimal schedule for all the resources. Sometimes, jobs get canceled, resources run late, and emergency jobs come in. Resource Schedule Optimization is a quick, intelligent way to optimize an individual resource's schedule and get the optimal route based on the changes.

1. From the dispatcher's console, right-click on the resource you want to optimize.
2. In the context menu, click **Resource Schedule Optimization**.
3. In the Resource Schedule Optimization window, define the optimization parameters. Consider which service appointments need to stay scheduled and which ones can be unscheduled or pushed to a later date.
 - a. **Time frame:** Time horizon being optimized. Service appointments are only scheduled within the horizon. Service appointment candidates can come from outside the horizon.
 - b. **Which service appointments:** Scheduled or Unscheduled. When selecting Unscheduled, Resource Schedule Optimization won't move the scheduled service appointments and only optimizes the unscheduled ones.
 - c. **Scheduling Policy:** The scheduling policy you want to use for this resource's schedule optimization.
 - d. **Filter candidate service appointments by:** Select a field on the service appointment. This creates a list of service appointments that are candidates to schedule to the resource.
 - e. **Filter only service appointments assigned to the resource:** Select if you only want to schedule service appointments already assigned to this resource.
 - f. **Keep the following service appointments scheduled:** Select a field on the service appointment. This creates a list of service appointments that Resource Schedule Optimization keeps scheduled and doesn't move.



Note: Ensure there are service appointments to optimize and that you've defined the filters to match the business requirements.

4. Click **Optimize**.

Resource Schedule Optimization Considerations

- Resource Schedule Optimization doesn't support capacity based resources.
- Complex work information that's not fully available in the optimization data is considered pinned. For example a partial chain of a complex work dependency.
- Resource Schedule Optimizations can't run in parallel for the same resource on the same time interval.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To see the Resource Schedule Optimization on the Gantt:

- Resource Schedule Optimization custom permission

KPI Monitor

The KPI (Key Performance Indicator) monitor provides important insight on your services.

The KPI Monitor can be found on the top right side of the Gantt.

The available indicators are:

- Total scheduled time (workload) of all loaded service territories.
- Average travel time per service of all service shown on the Gantt.
- Number of completed services out of all services shown on the Gantt.
- Total number of rules violating services.
- Total number of services in jeopardy.

Dispatcher Console Map

The map displays the location of appointments from the service appointments List, the resource's home base, and the resource's last known position.

You can also add any location-based object to the map.

- **Schedule services:** Click the service icon and click Schedule to auto-assign the service to an available resource.
- **Display Google traffic data:** Select the Traffic checkbox at the base of the map.
- **View a resource's daily route at street level:** Open the Resource section in the Gantt and click the right-hand tab.
- **View all location-based standard or custom objects as separate map layers:** Set up a tabular report for any object with latitude and longitude values. Click **Map Layers** in the top left corner of the map to view reports and resources.
 - In the Reports tab, you can select layers to add to the map. Only reports in the Field Service Reports folder appear in the Reports tab. The markers' icons on the map are visible according to the first column in the report. Up to 10 additional columns are visible inside the marker's info window.
 - The map shows all resources by default. Type a name in the Resources tab and click **Show on map** to view a single resource's markers.

 **Note:** The dispatcher console map may appear different than the map displayed on service territory member detail pages because of a difference in geocoding granularity. The dispatcher console map tends to be more accurate.

IN THIS SECTION:

[Dispatcher Console Map Views](#)

The Map view shows you all resources' home bases, assigned service appointments, and last known positions. You can view one or more items by selecting the checkboxes below the map.

[View Resource Availability](#)

You review and plan out your resource capacity. Gain insight into your workforce's work time, travel, and absences.

EDITIONS

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Map Polygons

Draw your own territories directly on the map, then link them to your service territories.

Display Travel Routes on Map

The scheduling engine uses street level routing to schedule your technician's day appropriately. On the day of service, the Field Service Lightning Mobile App tracks the actual route taken. You can see both routes together on the resource map view.

Dispatcher Console Map Views

The Map view shows you all resources' home bases, assigned service appointments, and last known positions. You can view one or more items by selecting the checkboxes below the map.

Select a resource name in the drop-down list to filter the Map to display only:

- **Service Appointment:** All assigned appointments to the selected resource and which appear in the Service list.
- **Home base:** Resources' home base, according to the home base coordinates specified in the resource details.
- **Live positions:** When resources update service appointment status from their mobile device, their coordinates are automatically recorded. Live Position shows the latest coordinates saved in the system.

View Resource Availability

You review and plan out your resource capacity. Gain insight into your workforce's work time, travel, and absences.

The Gantt filter lets you select how a resource's capacity is calculated. Deselect any fields that you don't want to be included in the calculation.

You can also customize the capacity-based color coding in the Field Service Settings > Scheduling > Dispatcher Console UI > Monthly View Settings. Enter the number of hours that indicate High Utilization (default: 150), Medium Utilization (default: 100), and Extensive Travel (default: 33). In the utilization view:

- Resources whose schedules are below Medium Utilization appear in green.
- Resources whose schedules are between High and Medium Utilization appear in yellow.
- Resources whose schedules are above High Utilization appear in red.
- Resources whose percentage of travel is larger than the value you specify are considered Extensive Travel candidates, and appear with an automobile icon.

 **Note:** Capacity must be set in hours. For example, you can't set the capacity to 5 work items per day. If you want to set capacity by work items, to put a large number of hours in addition to the real capacity by work item.

On the utilization resource view, you can:

- Click an event name to view its details.
- Flag services.
- Click the date on the vertical axis to switch to the date's daily view.

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Utilization percentage calculation

$(SA + Absences + Breaks + Travel Time) / (Overtime Hours + *Normal Hours*)$

When:

- SA = Service Appointments
- Absences = Resource Absence of type Absence
- Breaks = Resource Absences of type Break
- Overtime Hours = Time Slots of type Extended of the Resource Operating hours of its Primary Service Territory
- Normal Hours = Time Slots of type Normal of the Resource Operating hours of its Primary Service Territory

Using the checkbox on the Resource Filtering > Utilization section you can remove all parts of the equation except for Normal Hours, which must stay as an argument.

Map Polygons

Draw your own territories directly on the map, then link them to your service territories.

Once [map polygons are enabled](#), you can draw polygons straight on the map or import them in KML (Keyhole Markup Language) format through API. Draw a polygon on the Field Service map and then associate it to a Service Territory by selecting it in the drop down. When a new Service Appointment is created the service territory field is auto populated based on the Appointment's address.

When a service appointment address is changed and the service territory is blank, the address is matched to a polygon and that polygon's territory. You can use map polygons to apply bulk actions to all the Service Appointments in that polygon, straight from the field service map view.

View, create, or update polygons on the map from the dispatcher console.

1. From the Field Service app, click the Field Service tab.
2. Click the **Map** tab in the dispatcher console.
3. Click **Map Layers**.
4. Select **Polygons**.
5. Click **New**.
6. Name your polygon.
7. Select a color.
8. Optionally, select a service territory.
9. Draw your polygon on the map.
10. Click **Save**.

To update a polygon go back to the Polygons tab in the map tab of the dispatcher console.

1. Select your polygon from the tree view.
2. Click **Edit**.
3. Make your desired changes.
4. Click **Save**.

You can make the following bulk actions on a map polygon.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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- **Schedule / Unschedule / Dispatch:** Schedule, Unschedule or Dispatch all the Service Appointments that are in the Polygon in the current view.
- **In Jeopardy:** Set the In Jeopardy checkbox field as true for every Service Appointment which is shown on the polygon.
- **Delete Polygon:** Delete the polygon.
- **Cut Intersections:** Select a polygon and cut its intersections with other polygons.
 1. Select the relevant polygons.
 2. Click **Go**. The polygons are altered so they no longer intersect.

The polygons are trimmed and there are no intersections.

Considerations

- The dispatcher console supports loading up to 200 polygons.
 - A single polygon cannot have more than 3,200 coordinates.
 - If the service appointment geolocation matches more than one polygon, the appointment is assigned to the top-level territory or to the lowest territory in the hierarchy.
-  **Note:** When creating polygons, don't create overlaps unless there are parent-child relationships between the corresponding service territories (for instance East Village and New York). Middle tier territories are never assigned service appointments.

Display Travel Routes on Map

The scheduling engine uses street level routing to schedule your technician's day appropriately. On the day of service, the Field Service Lightning Mobile App tracks the actual route taken. You can see both routes together on the resource map view.

If history tracking is set on the last known location field on the service resource, both routes are displayed on the map. The actual route is based on the history of the resource's 'Last Known Location' field, which is updated by the mobile app.

The planned route is in blue and the actual route is pink. This way you can tell if the technician made a small detour, perhaps for a quick lunch break. When opening the resource details from the Gantt, go to the 'Map' tab and select a specific day.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Scheduling Policy Picker

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. The scheduling policy you select will be used in every scheduling action.

From the **Policy** dropdown, select a scheduling policy.

IN THIS SECTION:

[Appointment Booking](#)

Field Service Lightning lets you book service appointments for different Salesforce objects, including Work Orders, Work Order Line Items, Accounts, Assets, and Opportunities. To book an appointment, follow the steps below (for convenience, we'll use a Work Order)

[Rescheduling an Appointment](#)

You can reschedule appointments from their service appointment pages.

[Set Visiting Hours](#)

Create "visiting hours" for your customers to ensure that services are scheduled during a business's operating hours.

[Scheduling Service Appointments](#)

There are multiple options for scheduling service appointments.

[Unscheduled Service Appointments](#)

In Field Service Lightning there are different ways to schedule service appointments.

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Appointment Booking

Field Service Lightning lets you book service appointments for different Salesforce objects, including Work Orders, Work Order Line Items, Accounts, Assets, and Opportunities. To book an appointment, follow the steps below (for convenience, we'll use a Work Order)

To book an appointment, follow the steps below (for convenience, we'll use a Work Order):

1. Open a work order.
2. In the Chatter feed, select **Book Appointment**. If this action isn't available, you can add it to the layout.
3. Service Appointments can be booked for parent records, like a work order. These parent records can have many service appointments booked against to reflect different trips. The Book Appointment action gives you the opportunity to create a new appointment or reschedule an existing one.
4. Let's create a new appointment. Select a Work Type from the drop-down list. Work Types provide key inputs to the scheduling optimizer, including an estimated duration, plus skill requirements for the resource. The address is automatically populated using the Work Order's address (this is configurable through the Global Actions).
5. Select the Service Territory from the drop-down list, again to provide this input for scheduling purposes. Click **Show more options** if you want to change the Early Start and Due Date default range.
6. Click Get Appointments to view a graded list of available slots for this service. The list considers all scheduling constraints such as the current schedule, work rules, and service objective. Slots may be indicated with an 'Ideal' or 'recommended' icons. Clicking the information icon opens the Appointment Insights window, which shows how each slot ranks against the Company KPIs as defined in the Scheduling policy.
7. Click **Extend Dates** to show a wider range of service appointment dates.
8. Select an appointment window. A service appointment will be created and automatically allocated to a resource, taking into consideration all scheduling constraints.
9. To view the details, click View Service Appointment.



Note: Booking from objects other than work orders or work order line items creates a work order and the service appointment is created for that work order. For instance, an agent opens the appointment booking action from the Asset page and select a time slot. In doing this, a work order and a service appointment are created.

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USER PERMISSIONS

To enable Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Rescheduling an Appointment

You can reschedule appointments from their service appointment pages.

Once an appointment is booked, you can reschedule it from the service appointment detail page.

1. Open a parent record, like a Work Order, that has a booked appointment.
2. In the Chatter feed, select the **Book Appointment** quick action. If this action is not available, you can add it to the layout.
3. Review and adjust inputs for the Work Type, Address, and Service Territory, if desired.
4. Click Get Appointments to view a list of available slots.
5. Select the suitable appointment window, and the service appointment is automatically rescheduled.

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Set Visiting Hours

Create “visiting hours” for your customers to ensure that services are scheduled during a business’s operating hours.

Respect the operating hours of your business customers by creating “visiting hours” for them. For example, if a customer only wants technicians to visit on weekdays between noon and 4 PM, you can use visiting hours to ensure that any services for that customer are scheduled within those hours. The service scheduling optimizer will only schedule appointments for customers within their visiting hours. Dispatchers can manually schedule appointments outside a customer’s visiting hours, though they’ll be alerted that they’re doing so.

To set visiting hours:

1. Confirm that your profile has access to the “Field Service - Service Visiting Hours” work rule record type. If you don’t have access, click **Edit** next to Work Rules and add this record type to the “Selected Record Type” list.
2. Navigate to the Work Rules tab, and create a work rule by selecting “Field Service - Service Visiting Hours.”
3. Click **Continue**.
4. Add a name, such as “Service Appointment Visiting Hours,” and a description.
5. Click **Save**.

To add your new visiting hours work rule to a scheduling policy:

1. Navigate to the Scheduling Policies tab.
2. Select the scheduling policy you want to use.
3. Click **New Scheduling Policy Work Rule**.
4. Select the work rule.
5. Click **Save**.

Note:

- You can attach one calendar per service.
- The calendar is effective until you remove or replace it on the service.
- Calendars use the timezone of the service they’re attached to. The service inherits its service location’s time zone. If the location has no time zone specified, GMT is used.
- The scheduling optimizer respects visiting hours.
- You can map a lookup field from a custom object to the Service Object ‘Visiting Hours Calendar’ field to auto-populate the Visiting Hours Calendar field.

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Scheduling Service Appointments

There are multiple options for scheduling service appointments.

You can schedule service appointments in several ways:

- Manual drag and drop
- Click Schedule from the appointment mini view
- Click Schedule from the appointment list mass actions
- Use the Book Appointment quick action
- Use the Candidates Chatter quick action
- Use the Emergency Chatter quick action

IN THIS SECTION:

[Scheduling a Service Appointment Manually](#)

A dispatcher can manually schedule service appointments.

[Scheduling an Appointment in the Mini View](#)

You can schedule service appointments in the service list's mini view.

[Schedule Multiday Service Appointments](#)

You can schedule service appointments that span multiple days.

[Schedule Work Dependencies with Complex Work](#)

To stay on top of complex projects, create dependencies between related service appointments. For example, ensure that related appointments start at the same time or are assigned to the same service resource.

[Scheduling an Appointment from the Mass Schedule Action](#)

Mass actions let you schedule multiple service appointments automatically.

[Scheduling an Emergency Service Appointment](#)

A real-time map view helps you schedule and manage emergency service appointments.

[Changing the Service Appointment Status Manually](#)

You can change a service appointment's status manually.

[Changing an Appointment Status from the Gantt Chart](#)

You can use the Gantt chart to change a service appointment's status.

[Changing an Appointment Status in Chatter](#)

You can go to the Chatter feed to change a service appointment's status.

[Changing an Appointment Status on Service Appointment Detail Page](#)

You can go to a service appointment detail page to change an appointment's status.

[Automatic Appointment Status Change](#)

The Service Appointment status can be changed automatically or manually by the dispatcher or the field resource.

[Scheduling Policies](#)

Field Service Lightning includes scheduling policies.

[Checking Rule Violations](#)

Rule violations occur when Field Service Lightning recognizes that an appointment schedule doesn't adhere to predefined scheduling rules. Examples of rule violations include travel time conflicts, and appointments that are not scheduled between their Earliest Start Permitted and Due Date.

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Scheduling a Service Appointment Manually

A dispatcher can manually schedule service appointments.

The Dispatcher can schedule a service appointment by dragging it from the appointment list and dropping it on a selected resource space on the Gantt chart.

Using this method, you can drag the service appointment to any resource. If it causes rule violations (for example, the wrong skill set), it will be marked with a yellow triangle. Hovering over the service appointment space shows the appointment details and the list of rule violations, as shown below:

 **Note:** Rule violations can only occur when a service appointment is scheduled manually. Automatic scheduling never breaks a rule.

You can configure what should be the stopping points for your appointments when dragging & dropping. Simply change the value in the settings to the duration of your choice.

1. For Field Service Settings, click **Scheduling > Dispatcher Console UI > Drag Jumps**>> on Gantt.
2. Set the minute window to your preference.

Manual Scheduling Considerations

- When dropping an appointment block on the Gantt, it shifts to the closest valid slot. For example, if drag jumps are set to 30 minutes and the appointment is dropped at 10:20 it moves to 10:30. If it is dropped at 10:14 it moves to 10:00.
- Gantt Chart Appointment Minimum Drag Step settings lock the appointment block for a minimum amount of time. It was meant to avoid human errors when the dispatcher moved the appointment block accidentally. Customers who are using the Drag Jump feature usually don't need the Gantt Chart Appointment Minimum Drag Step feature, and are best to leave it configured to 1 minute.

Scheduling an Appointment in the Mini View

You can schedule service appointments in the service list's mini view.

Click a service appointment in the service list to expand a mini service view. On the bottom of the mini service view, you can find the Schedule action.

Click **Schedule** to let the system schedule the service appointment while taking into account the rules and objectives in the configured scheduling policy (located above the service appointment list).

You will be notified if there are no available candidates. You can manually bypass the rules and objectives for further scheduling.

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Schedule Multiday Service Appointments

You can schedule service appointments that span multiple days.

Rome wasn't built in a day, and chances are that your grander projects also require more than a day's work. Happily, you can schedule service appointments that span multiple days.

To enable multiday scheduling:

1. In the App Launcher, select the **Field Service Admin** app.
2. Select the **Field Service Settings** tab.
3. Click Scheduling in the left-hand panel and then click **General Logic**.
4. In the `Multi-day service appointment` field dropdown select **Is MultiDay**.
5. From the Setup Object Manager, enter `Service Appointment` in the Quick Find box and select **Service Appointment**.
6. Click **Page Layouts**.
7. Click **FSL Service Appointment Layout** in the Page Layout Name column.
8. Add the `Is MultiDay` to page layouts.
9. Click **Save**.
10. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets** under Users.
11. Click **FSL Dispatcher Permissions**.
12. In the Apps section, click **Custom Permissions**.
13. Click **Edit**.
14. Add `FSL.MDT View` permission to the FSL Dispatcher permission set.



Tip: If you want only some of your users to be able to access the multiday view you can create your own permission sets and assign these to your users.

15. Click **Save**.

When a service appointment spans multiple days, select this checkbox on the service appointment. The multiday service spans over the time needed based on its duration and the assigned resource availability. multiday is supported in the following scheduling actions:

- Drag and drop
- Get candidates (get candidates only shows the time the multiday work can start)
- Appointment booking
- Scheduling from the Gantt or the quick action
- Reshuffle
- Optimization
- On multiday service appointments, start and end times must be in valid time slots of the assigned resource's calendar.
- The resource can't be assigned to any other appointment during the multiday service appointment.
- Multiday service appointments that overlaps with other services don't trigger the fix overlaps capability.
- Multiday service appointments can't be assigned to a capacity based resource or contractor.
- Multiday service appointments can't span over more that eight weeks.
- Multiday work calculations are run when the assigned resource changes, the service appointment duration changes, or the service appointment start changes.

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USER PERMISSIONS

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Schedule Work Dependencies with Complex Work

To stay on top of complex projects, create dependencies between related service appointments. For example, ensure that related appointments start at the same time or are assigned to the same service resource.

To be able to create dependencies between related service appointments, enable complex work.

1. In the App Launcher, select the **Field Service Admin** app.
2. Select the **Field Service Settings** tab.
3. Click **Scheduling** in the left-hand panel and then click **General Logic**.
4. Under **Complex Work**, select **Enable complex work**.
5. If you want related service appointments to always be scheduled in the same scheduling operation, select **Use all-or-none scheduling for related appointments**. This setting prevents a chain of two service appointments with dependencies between them from being scheduled separately. It doesn't apply for chains of three or more appointments.

After complex work is enabled, you can create any size chain of appointments and schedule it right from the Complex Work Visualforce page. This page is embedded in the service appointment page layout, but can be embedded in any page layout. The following dependencies are available:

- **Same start:** The service appointments must start together.
- **Start after finish:** Service appointment B cannot start until service appointment A is completed.
- **Same resource:** The service appointments must be assigned to the same service resource.

You can also use the scheduling actions, dispatcher console, and optimization to schedule chains of two appointments. For example, if you use the Book Appointment quick action to try to schedule an appointment that is part of a chain of two appointment, both appointments in the chain will be scheduled.

Considerations for Using Complex Work

- To view a service appointment's related appointments, right-click the appointment on the Gantt and select **Show related**.
- To control which fields are shown in the search results, modify the Service Appointments List Columns field set.
- Capacity-based resources can't be assigned to appointments that are part of an appointment chain.
- If a chain of service appointments encompasses multiple service territories, all of the territories must be selected in the optimization request for the appointments to be scheduled.

EDITIONS

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Scheduling an Appointment from the Mass Schedule Action

Mass actions let you schedule multiple service appointments automatically.

By using the Schedule option from the Service Appointment List Mass Actions menu, you can automatically schedule multiple service appointments in order based on their priority.

To schedule service appointment(s):

1. In the Service Appointment list, select the appointment(s) you would like to schedule.
2. On the service list mass schedule menu, click Schedule.
The progress bar appears at the bottom right corner.
3. When the scheduling process is completed, you can either close the message box or view the detailed schedule results by clicking **View Service Appointments**.

Scheduling an Emergency Service Appointment

A real-time map view helps you schedule and manage emergency service appointments.

Swiftly schedule, dispatch, and track emergency appointments in just a few clicks with the help of a real-time map view. Clicking the Emergency Chatter action on a service reveals a map view of your closest field resources so you can dispatch work immediately.

Emergency Chatter action

The Emergency Dispatch Settings include several ways to customize your approach to emergency services.

Setting Name	Description
Emergency Scheduling Policy	The default policy that will be used to find resources to assign to an emergency service. We recommend using an Easy policy with softer rules to ensure that more candidates are returned.

EDITIONS

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Setting Name	Description
Last Known Location Validity	The number of minutes after which a data breadcrumb--such as resource location or geolocation--is no longer valid. For example, if the breadcrumb validity is 20 minutes and the location of resource X was last updated 30 minutes prior, the emergency dispatcher then calculates the resource's ETA based on the location of the last appointment they completed, or if they did not complete any appointments that day, their home base, which is either their Service Territory Member address, or if not applicable their Service Resource address.
Idea/Good Availability Grade	The grading of candidates (color-coded). In the breadcrumbs example: <ul style="list-style-type: none"> Resources who can reach the service in less than 30 minutes are ideal candidates. Resource who can reach the service between 30 and 60 minutes are good candidates. Resources who can reach the service after 60 minutes are bad candidates.
Emergency Search Timeframe	The amount of time you have to resolve the emergency, not counting the service duration. The <i>Earliest Start</i> Permitted on the appointment is set to the current time, and the <i>Due Date</i> = current time + appointment duration + Emergency Search Timeframe. For example, if an appointment will require one hour of work and you set the Emergency Search Timeframe to 360 minutes (6 hours), the emergency dispatcher shows you only resources who can travel to and complete the task in the next 7 hours.

Click a resource on the map to see:

- Their route to the emergency service and ETA.
- The data (breadcrumb) that their location is based on.
- A Dispatch button. Click **Dispatch** to assign the appointment to them and send them a customizable Chatter notification.

Resource locations are calculated based on their latest breadcrumbs. If they don't have valid breadcrumbs, their location is the location of the last appointment they completed, or if they did not complete any service appointments that day, their home base, which is either their Service Territory Member address, or if not applicable their Service Resource address.

The emergency dispatcher tool comes with a range of helpful features:

- If your current scheduling policy isn't returning any candidates, change the policy directly on the map to trigger another search (for instance, from Medium to Easy).
- If you want a candidate to complete their current service before heading to the emergency service, change the dispatcher setting from "as soon as possible" to "after current service" at the top of the map. Changing this setting updates the candidates' ETA.
- Click Candidates to view a list of all candidates in order of ETA. Hover over a resource name in the list to see options to dispatch them or view them on the map.

- Quickly spot emergency services in the Gantt by looking for the lightning icon.
- If available, click the traffic layer.
- Zoom in on the emergency service location.

Changing the Service Appointment Status Manually

You can change a service appointment's status manually.

The Service Appointment status can be changed either automatically (that is, status becomes 'None' by the unscheduled Gantt action, status becomes Dispatched by the Auto dispatch background job etc.) or manually by the dispatcher or the field resource. This section explains manual status changes done by a dispatcher. Automatic status changes are described under Automatic Service Status Change.

You can manually change the Service Appointment status from several places:

- Service Appointment on the Gantt Chart – Right click, and change the status
- *Change status* Chatter quick action
- Service Appointment detail page or lightbox

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Changing an Appointment Status from the Gantt Chart

You can use the Gantt chart to change a service appointment's status.

1. On the Gantt, select the appointment(s) whose status you want to change. You can select more than one service by holding CTRL / CMD while clicking on service appointments.
2. Right-click on the selection to display the Gantt actions.

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Changing an Appointment Status in Chatter

You can go to the Chatter feed to change a service appointment's status.

1. Open a service appointment record whose status you want to change, either in a Salesforce record detail view or in a Gantt lightbox.
2. In the Chatter feed, select the 'Change Status' Chatter quick action.
3. Select the desired status. Only status values that obey the status flow configuration are shown. A notification appears that the status was updated successfully.

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Changing an Appointment Status on Service Appointment Detail Page

You can go to a service appointment detail page to change an appointment's status.

1. Open the service appointment record whose status you want to change, either in a Salesforce record detail view or in a Gantt lightbox.
2. Double-click the **Status** field to select a new value.

 **Note:** The dropdown list will show all statuses in the system, but the status change will work only according to the configured Service Appointment Lifecycle status transitions.

Automatic Appointment Status Change

The Service Appointment status can be changed automatically or manually by the dispatcher or the field resource.

Automatic status changes are triggered by the following:

- **Automatic Status change - Auto dispatch background job:** This job enables automatic dispatching of assigned appointments. It changes the status of the chosen appointments (according to the job configuration) from Scheduled to Dispatched.
- **Automatic Status change – System trigger:**
Unschedule the Service Appointment when its status is changed to Canceled or New:
 When a service is Canceled or its status is changed to None, the service will be automatically unscheduled and removed from the Gantt.

The above trigger can be activated or deactivated, according to the business needs.

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Scheduling Policies

Field Service Lightning includes scheduling policies.

A scheduling policy is a set of rules and objectives that are used in a scheduling operation. Typically, the scheduling policy is used when requesting an appointment and on various Gantt operations such as Schedule, Candidates etc.

The following scheduling policies are included in Field Service Lightning:

- **Customer First:** This policy balances objectives such as great customer service with travel minimization. Appointments are graded first by the customer's selection of a preferred employee and by the ability to provide the service as soon as possible. Travel minimization is considered as a second priority.
- **High Intensity:** This policy is typically used in times of high service volumes, in emergencies like a storm scenario, where the business focuses on employee productivity first and customer preferences are considered as a second priority.
- **Soft Boundaries:** This policy is identical to the Customer First policy, but allows the sharing of employees between different territories in order to enhance service coverage.
- **Emergency:** This is the default policy for the emergency quick action, which lets you quickly dispatch a resource to the emergency site with as few constraints as possible. To see resource information while using the emergency quick action, add the emergency fields to the service resource object and they will show on the tooltip.

You can create additional scheduling policies to reflect your business needs. The dispatcher can select different scheduling policies while using the Gantt scheduling operations. The list of scheduling policies is located above the appointments list on the Dispatcher Console.

Checking Rule Violations

Rule violations occur when Field Service Lightning recognizes that an appointment schedule doesn't adhere to predefined scheduling rules. Examples of rule violations include travel time conflicts, and appointments that are not scheduled between their Earliest Start Permitted and Due Date.

Rule violations will not occur when using the Automatic Scheduling (such as Schedule action or Candidates action). The system will automatically choose schedules that do not violate any rules.

The Rule Violation list is displayed on your screen, listing the rules that have been violated.

If rule violations are incurred, a service appointment is marked with a yellow triangle. Hovering over the service appointment space shows the details and the list of the rules that have been violated.

The set of rules taken into consideration on the Dispatcher Console is taken from the configured scheduling policy (located above the service list).

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Unschedulering Service Appointments

In Field Service Lightning there are different ways to schedule service appointments.

You can unchedule service appointments from several places:

- Dispatcher Console – Service Appointment list mass Actions menu
- Service Appointment on the Gantt – Right click, then select **Unschedule**
- Changing service appointment status to **None**

IN THIS SECTION:

[Unschedulering an Appointment with Mass Actions](#)

By using the unchedule option from the Service Appointment List Mass Actions menu, you can unchedule one or more service appointments at the same time.

[Unschedulering an Appointment from the Gantt Chart](#)

While you're viewing a Gantt chart, you can unchedule service appointments.

[Unschedulering an Appointment by Changing the Status to None](#)

Changing a service appointment status to None automatically unchedules it and removes it from the Gantt. You can change the status to None by simply editing the status field.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Unscheduled an Appointment with Mass Actions

By using the unschedule option from the Service Appointment List Mass Actions menu, you can unschedule one or more service appointments at the same time.

To unschedule an appointment with mass actions:

1. In the Service Appointment list, select the appointments(s) you want to unschedule.
2. On the list mass schedule menu, click **Unschedule**. The progress bar will appear on the bottom right.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

To enable Field Service Lightning managed package:

- Customize Application

To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Unscheduled an Appointment from the Gantt Chart

While you're viewing a Gantt chart, you can unschedule service appointments.

1. On the Gantt chart, select the service appointment(s) you want to unschedule. You can select more than one appointment by holding CTRL / CMD while clicking appointments.
2. Right-click on the selection to display the Gantt actions.
3. Click **Unschedule**.

Unscheduled an Appointment by Changing the Status to None

Changing a service appointment status to None automatically unchedules it and removes it from the Gantt. You can change the status to None by simply editing the status field.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

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To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Managing Service Resources

Resources represent technicians that are assigned to complete a service appointment.

IN THIS SECTION:

[Viewing a Service Resource's Calendar](#)

Resource detail pages include a customizable calendar that shows the resource's scheduled services and absences. This makes it easier for dispatchers to get a snapshot of a resource's availability, and helps resources keep track of their schedule.

[Assign a Resource Skill for a Given Time Period](#)

Often, technicians earn certifications that must be renewed periodically to ensure that their skills remain up-to-date. You can specify a time period for a resource's skill to make it easier to track active certifications and skill levels.

Viewing a Service Resource's Calendar

Resource detail pages include a customizable calendar that shows the resource's scheduled services and absences. This makes it easier for dispatchers to get a snapshot of a resource's availability, and helps resources keep track of their schedule.

Follow these steps to control which information appears in the calendar:

1. Manage which fields appear in calendar entries for Service Appointments:
 - a. From Setup, enter Appointment in the Quick Find box, then click **Field Sets** under Service Appointments.
 - b. You can customize two field sets:
 - *Service Appointment Resource Calendar Display*: Controls what information appears on the calendar entry.
 - *Services Appointment Resource Calendar Tooltip*: Controls what information appears in a tooltip when you hover over the calendar entry.

2. Manage which fields appear in calendar entries for Resource Absences:
 - a. From Setup, enter Absence in the Quick Find box, then click **Field Sets** under Resource Absence.
 - b. You can customize two field sets:
 - *Resource absence Resource Calendar*: Controls what information appears on the calendar entry.
 - *Absence Resource Calendar Tooltip*: Controls what information appears in a tool tip when you hover over the calendar entry.

3. Use the Absence Color field to change the Resource Absence color displayed on the Gantt chart. Sometimes you want to represent different absences with different colors. For instance you might want to color a car break with Red and internal meeting with green. You can populate the gantt color field on the resource absence object with a 6 digit Hex code (in the format of #xxxxxx) and the absence block on the Gantt chart is colored in accordance.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

USER PERMISSIONS

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- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

 **Tip:** Use the Process Builder to automate coloring of resource absence.

When you navigate to the Service Resources tab and click a resource name, you can now see their calendar. Clicking a field on a calendar entry opens the corresponding record in a new tab.

 **Note:** If you don't see the calendar on resource pages, add the VF079_ResourceCalendar Visualforce component to the resource page layout.

Assign a Resource Skill for a Given Time Period

Often, technicians earn certifications that must be renewed periodically to ensure that their skills remain up-to-date. You can specify a time period for a resource's skill to make it easier to track active certifications and skill levels.

For example, suppose a networking technician passed the networking certification exam, which grants him Level 2 router repair skills for one year. To reflect this time period on the resource record:

1. Navigate to the resource record.
2. Select the skill that the resource has gained. The Level and Phase fields appear next to the skill.
3. Under Phase, click **Add**. The skill phase options appear to the right.
4. Enter a start and finish date. If you don't specify a start date, the skill is considered valid since the beginning of time. If you don't specify an end date, the skill phase never expires.
5. Enter a skill level.
6. Click **Save**.
7. If desired, add additional skill phases by clicking **Add Phase**.

 **Note:** Users can define several skill phases for each resource, and skill phases can be assigned to different skill levels. For best results, keep all skill levels between 1 and 10, and don't create more than 50 time phases per skill.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

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To assign a permission set license:

- Manage Users

To create a permission set:

- Manage Profiles and Permission Sets

Service Crews in the Dispatcher Console

If service crews are enabled in the Field Service Lightning managed package, the Resource Gantt displays service resources of type Crew and service crew members.

The Resource Gantt displays the Gantt Label text on the Service Crew Member drawn on the Gantt. If the field is blank on a service crew member record, it defaults to the Service Crew Name + "Crew Member." For example, Alpha Team Crew Member.

For service resources of type Crew, select **Show Crew** in the Service Resources menu to leave only the Crew and its members on the Gantt and hide other resources. Click **Hide Crew View** to return to the regular display.

Crew-related Gantt filters

The following filter settings related to crews are available:

- Hide Crews and Service Crew Members: Shows only service resources of type Technician that are not allocated to a crew in the time frame open on the Gantt.
- Show only Crews: Show only service resources of type Crew.
- Show Crews and Their Service Crew Members: Show only service resources of type Crew and service resource of type Technician who are allocated to these crews in the time frame open on the Gantt.
- Hide Service Crew Members: Show only service resources of type Crew and service resources of type Technician who are not allocated to crews in the time frame open on the Gantt.
- Show all: Do not filter based on crew properties.

The service list also includes a filter that shows service appointments that fit one or both of the following requirements:

- The appointment is assigned to a service resource of type Crew
- The appointment's parent record's Minimum Crew Size is greater than 1

 **Note:** The FSL.Service List View - Crews custom permission controls the user visibility of the Crews list view. If you want your users to be able to access this view, assign them this custom permission. For instance, if you would like all of your dispatchers to access the Crews view, add the custom permission to the FSL Dispatcher Permissions permission set.

SEE ALSO:

[Service Crew Scheduling Considerations](#)

[Group Service Crew Skills](#)

[Create Service Crews](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning Mobile App

The Field Service Lightning mobile app for Android and iOS is an all-in-one tool for field service technicians on the go. This enterprise-class mobile experience leverages Salesforce in a lightweight design optimized for a modern mobile workforce. Offline capability means that users can keep working without internet connectivity and know that all their changes are saved. And the app is highly customizable, allowing you to tailor it to your unique field service needs.

Review this table to learn what the app has to offer. If you aren't yet using Field Service Lightning in Salesforce, see [Set Up Field Service Lightning](#) before getting started with the app.

Feature	Description
Offline capability	The app works offline, so technicians can complete their work even with limited or no network connectivity.
Push notifications	Push notifications help your mobile workforce stay up to date, making sure they never miss an important event.
Custom branding	Brand the app to give it your company's look and feel.
Configurable layouts	Flexible layouts let you choose what record information to display to your users.
Configurable actions	Configure quick actions to help users quickly complete common tasks, pass record data to other apps, and build flows to guide your team through collecting information and finalizing jobs.
Chatter	Communicate with dispatchers, partners, and customers using Chatter.
Community user access	Give members of your Salesforce Community--like contractors--custom access to your field service operation.
Geolocation tracking	Keep tabs on service resources and enable smarter scheduling with resource geolocation tracking.
Service reports	Create previewable service reports summarizing field service visits. Seal the deal by capturing customers' signatures on the reports.
Salesforce Knowledge integration	Attach specs, instructions, and best practices to work orders and work order line items to keep relevant information at your team's fingertips.
Work order overview screen	Help your team quickly find the information they need to complete assignments. The work order overview screen displays information about a

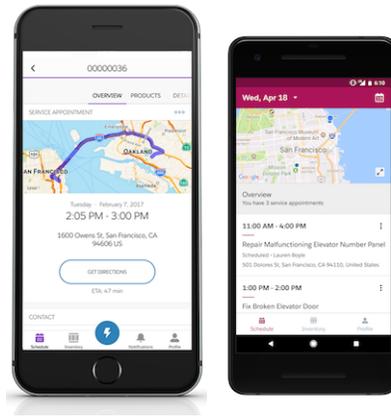
EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

Feature	Description
	work order's service appointments, line items, asset history, and more.
Find nearby work	Help your team find other work orders in the same location so they can take care of nearby jobs.
Inventory tab	Let your team manage track consumption, request products, and view their inventory from the app.



SEE ALSO:

- [Field Service Lightning Mobile App Limitations](#)
- [Field Service Lightning Mobile App Requirements](#)
- [Field Service Lightning Android and iOS Mobile App Comparison](#)
- [Using the Field Service Lightning Mobile App](#)

Field Service Lightning Mobile App Requirements

Learn about the mobile app's device, connectivity, edition, and license requirements.

Supported Devices

Supported Devices	Supported Mobile OS	Other Requirements
<p>Android: All major Android devices are supported. The app is optimized for Samsung, Nexus, and Pixel devices.</p>	Version 5.0 and later	Google Play Services version 10.2.0 and later
<p>iOS:</p> <ul style="list-style-type: none"> • iPhone 5c/5s or later models • iPad 4 or later models (including iPad Air 2 and iPad Pro) 	iOS 10.3 or later	

For optimal performance, keep your mobile devices' operating systems updated and upgrade to the latest model of devices as allowed by your mobile plan. Future versions of the Field Service Lightning mobile app may require removing support for older operating systems, and sometimes newer operating systems don't perform well on older devices.

Wireless Connection

The Field Service Lightning app is optimized for offline performance, but a Wi-Fi® or cellular network connection is needed for the app to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

SEE ALSO:

- [Give Users Access to the Field Service Lightning Mobile App](#)
- [Field Service Lightning Mobile App Limitations](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

Field Service Lightning Mobile App Limitations

Review limitations for the Field Service Lightning mobile app for Android and iOS.

Service Reports

- If a work order has one or more service appointments, app users can create service reports only for the work order's service appointments, not for the work order itself. Clicking **Create Service Report** on the work order overview screen creates a service report that uses the Service Appointment for Work Order sub-template of the selected service report template. The same limitation applies to work order line items with service appointments: the line item's service reports use the Service Appointment for Work Order Line Item sub-template. Users in the full Salesforce site can generate service reports without issue for any work order or work order line item.
- (Android only) Service closure flows aren't supported. This means that signature capture can't be included as the final step of a flow and must be performed separately.
- Service report previews include the following limitations, which don't apply to non-preview service reports:
 - The data in service report previews may be out of date because the app doesn't automatically get the latest data before generating a preview.
 - Reference fields aren't populated if they exceed the maximum priming depth of 2.
 - If a service report template includes a related list, but the record that the service report is being generated for doesn't have the related list on its page layout, the related list isn't populated.
 - Formula field values may be inaccurate in a preview because they aren't dynamically calculated.
 - Roll-up summary fields are blank.
 - The following elements aren't visible:
 - Cases related list
 - Headers and footers
 - Organization fields
 - Certain data fields
 - Images in rich text fields on a service report template or service appointment, work order, or work order line item page layout

EDITIONS

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Inventory Management

- App users can consume—via the Products Consumed related list—only one serialized product item per product per work order. For example, you may have multiple product items that are assigned serial numbers and that are all associated with your Inverter product. An app user can add only one of them as a product consumed on a specific work order. This limitation doesn't apply to non-mobile platforms.
- The products consumed on a work order or work order line item must all be associated with the same location via the product item field. In other words, a work order can't have one product consumed linked to a product item associated with the Warehouse A location, and a second product consumed whose product item is associated with the Service Van 42 location. Users searching for product items when creating a product consumed just see product items associated with their mobile inventory location. You can remove this location limitation for iOS users in Setup; for details, see [Let Users Manage Inventory from the Field Service Lightning Mobile App](#)

Chatter

- Users can't edit Chatter posts or set Chatter profile images from within the app.
- The Feed tab in iOS is supported only on the work order, work order line item, and case objects. The Feed tab in Android is supported only on the work order and work order line item objects.
- (Android only) Chatter is disabled when the app doesn't have internet connectivity.

For a comparison of supported Chatter functions in Android and iOS, see [Chatter in the Field Service Lightning Mobile App](#).

Knowledge

- (iOS only) Images in knowledge articles display normally if they are hosted outside of Salesforce. Articles that use images uploaded to Salesforce won't load those images. As an alternative, we recommend using an image link that users can open themselves. You can avoid this issue by selecting the option to use POST requests for cross-domain sessions. Find this option on the **Session Settings** page in Setup.
- (Android only) If a mobile app user's device is running in any of Salesforce's 26 supported languages, the app automatically translates the articles to the language of their mobile device's operating system. Otherwise, the app defaults to English.

Barcode Scanner

- The barcode scanner is compatible only with 1D serial barcodes and 2D QR codes.
- In barcode scanning, the Android app uses the Zebra Crossing library. The iOS app uses Apple's built-in libraries with the exception of `AVMetadataObjectTypeFace`; for details, see [AVMetadataObjectType](#).
- The barcode scanner can only be used to search for existing barcodes in your org, and cannot be used to add new barcodes.

Flows

- Resources of the type Formula aren't supported.
- Actions in flows cannot rely on the output parameters of an action.
- Returning to a previous screen is not allowed during a flow if the flow includes a loop or subflow.
- The `wasSelected` operator cannot be used in decisions.
- Hardcoded ID values must be 18 digits long. 15-digit values aren't supported.
- (Android only) Service closure flows aren't supported, so signature capture can't be included as the final step of a flow and must be performed separately.

Lightning App Extensions

- The Salesforce app no longer support parameters passed through Lightning app extensions. Attempting to pass parameters from Field Service Lightning with a Lightning app extension to the Salesforce app opens the Salesforce app on the mobile device, but without any of the parameters being read by it.
- The Salesforce app can launch and accept parameters for Visualforce pages exposed as a Lightning Page Tab. However, the Lightning Page Tab name can't have any spaces in it.

General Limitations

- Visualforce pages aren't supported in the app, including actions and Visualforce components on page layouts.
- Lightning Component and custom override quick actions aren't supported.
- Lookup filters aren't supported.

- (Android only) By default, there is no way to automatically open a record from the Field Service Lightning app in the Salesforce app without a Lightning app extension.
- (Android only) Files and Notes aren't supported.
- (Android only) Dependent picklists aren't supported in flows, quick actions, or global actions.
- (iOS only) Only plain text is supported for rich text fields.
- (iOS only) Default values are not available in offline mode.
- (iOS only) Lookup fields, like Account, aren't supported on the Schedule, Work Order, and Work Order Line Item tabs and won't show up.
- (iOS only) Custom override on actions is unsupported, including custom override on lookup logic.

SEE ALSO:

[Field Service Lightning Limits and Limitations](#)

[Field Service Lightning Mobile App Requirements](#)

[Field Service Lightning Android and iOS Mobile App Comparison](#)

[View Knowledge Articles in the Field Service Lightning Mobile App](#)

Security Considerations for the Field Service Lightning Mobile App

Protect and safely store data that is gathered from the Field Service Lightning mobile app.

For information about data protection regulations and Service Cloud, see [Data Protection and Privacy](#).

Encrypting Data at Rest

Encryption boosts the security of your customers' data and helps you comply with privacy policies, regulatory requirements, and contractual obligations. Shield Platform Encryption and Field Audit Trail are supported for the following fields on work orders, work order line items, and service appointments:

- Description
- Subject
- Address (Street and City only)

To encrypt these fields, add them to your Encryption Policy in Setup. The Subject and Address fields support both probabilistic and deterministic encryption, while the Description field supports only probabilistic encryption. If Field Audit Trail is enabled, you can set field history data retention policies for the fields whose data you want to retain.

Important:

- Encryption is not supported for the Latitude and Longitude fields, which could be used to pinpoint an address.
- When you encrypt a field, existing values aren't encrypted. Contact Salesforce for help encrypting existing data.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

Encrypting Data in Transit

Data transmitted to and from the Salesforce server is protected using SSL. Authentication, access controls, and digital signatures are protected using SHA-256.

Defining Trusted IP Ranges

Logins to the Field Service Lightning mobile app can be restricted to specific trusted IP ranges, which is also true for the Salesforce mobile app. You can implement this using a Virtual Private Network (VPN) solution on mobile devices. After logging in to VPN, users can log in to the app.

Storing Offline Data

Data is stored using the SmartStore encrypted database, which is provided by the Salesforce Mobile SDK. Encryption is provided by SQLCipher for iOS and by 3DES for Android. Cached data is purged based on a least-recently-used cache policy.

Storing Files and Attachments

Files are stored in an iOS sandboxed directory and encrypted by application encryption. Files are temporarily decrypted to disk in another sandbox directory during viewing but are erased when the app is in background mode or the viewer is dismissed. The temp directory is cleared when the app launches. Files aren't supported in the Android app.

Storing Feed Data

Chatter or feed data is stored in a local SmartStore encrypted database. Encryption is provided by the Sqlcipher library. Cached data is purged based on a least-recently-used cache policy.

SEE ALSO:

[Encrypt New Data in Fields](#)

[Which Standard Fields and Data Elements Can I Encrypt?](#)

[Field Audit Trail Implementation Guide](#)

[Salesforce Mobile App Security Guide](#)

Field Service Lightning Android and iOS Mobile App Comparison

Learn about the main feature differences between the Android and iOS versions of the Field Service Lightning mobile app.

Feature	Supported on Android	Supported on iOS
Native deep linking to the Salesforce App		
Filters on mobile service reports		
Multiple signatures on service reports		
Mentioning people and groups		
Video, image, and PDF posts		
Deleting posts		
Liking and bookmarking posts		
Offline posts		
Find work by location		
Products required		
Product requests		

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SEE ALSO:

[Push Notifications in the Field Service Lightning Mobile App](#)

[Field Service Lightning Mobile App Limitations](#)

[Supported Data Types in the Field Service Lightning Mobile App](#)

Supported Data Types in the Field Service Lightning Mobile App

Learn which data types are supported in the Field Service Lightning mobile app for Android and iOS.

Data Type	Supported
Auto Number	
Formual	
Roll-Up Summary	
Lookup Relationships	
External Lookup Relationship	
Checkbox	 (Shows Yes/No)
Currency	
Date	
Date/Time	 (The following fields aren't supported: Scheduled End, Scheduled Start, Arrival Window End, Arrival Window Start)
Email	
Geolocation	
Number	
Percent	
Phone	
Picklist	
Picklist (Multi-Select)	
Text	
Text Area	
Text Area (Long)	
Text Area (Rich)	
Text Area (Encrypted)	
TimeBETA	

EDITIONS

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Data Type	Supported
URL	

SEE ALSO:

- [Field Service Lightning Mobile App Limitations](#)
- [Customize the Field Service Lightning Mobile App](#)

Prepare for the Field Service Lightning Mobile App

Before you configure user access and customize the Field Service Lightning mobile app, download the connected app.

The connected app, which is different from the actual Field Service Lightning mobile app, provides push notifications and other app settings related to service report generation and app customization. If your team uses both Android and iOS devices, download both.

- For iOS: <https://sfdc.co/MobileFieldServicePackage>
- For Android: <https://sfdc.co/MobileFieldServiceAndroidPackage>

SEE ALSO:

- [Give Users Access to the Field Service Lightning Mobile App](#)
- [Using the Field Service Lightning Mobile App](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

- To install connected apps
- Customize Application

Give Users Access to the Field Service Lightning Mobile App

To give your mobile workforce access to the Field Service Lightning mobile app, set them up with the right user license and permissions. These steps also apply to community users.

1. Assign the Field Service Mobile user license to the user.
2. Create a Field Service Mobile permission set.
 - a. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
 - b. Click **New**.
 - c. Select the Field Service Mobile license from the picklist.
 - d. Click **Save**.
 - e. Click **System Permissions**, then click **Edit**.
 - f. Select the **Field Service Standard** and **Field Service Mobile** system permissions.
 - g. Click **Save**.
3. Customize the permission set's object permissions.

Click **Object Settings**, then click an object's name to modify its permissions. Save your changes after modifying an object. At a minimum, app users need the following permissions. You can assign additional permissions to objects such as assets, accounts, and products, as you see fit.

Object Name	Object Permission Needed	Field Permission Needed
Contact	Read	Email, Name, Phone, Title
Resource Absence	Read, Create, Edit	Absence Number, End Time, Start Time, Resource, Type
Service Appointment	Read, Edit	Address, Appointment Number, Contact, Created By, Created Date, Owner, Parent Record, Parent Record Type, Parent Record Status, Category, Scheduled Start, Scheduled End, Status, Work Type
Service Resource	Read, Edit	Active, User
Work Order	Read, Create, Edit	None

4. Add the API Enabled system permission to the permission set.
 - a. Click **System Permissions**.
 - b. Click **Edit**.
 - c. Select **API Enabled**.
 - d. Click **Save**.

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USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

To manage users:

- Manage Users

To create service resources:

- Create on service resources

5. Assign the permission set to your mobile app users.
 - a. Click **Manage Assignments**, and then click **Add Assignments**.
 - b. Select all users who needs the app permission set.
 - c. Click **Assign**.
6. Create a service resource record for each user. For instructions, see [Create Service Resources](#).

SEE ALSO:

- [Let Users Manage Inventory from the Field Service Lightning Mobile App](#)
- [Give Users Access to Field Service Lightning](#)

Let Users Manage Inventory from the Field Service Lightning Mobile App

Customize your page layouts and user permissions to your team can take care of inventory management tasks. For example, give technicians the ability to log product consumption, create product requests, and keep their service vehicle inventory current. Inventory management is supported in both Android and iOS.

Before getting started, get to know Salesforce inventory management lingo and processes. See [Set Up and Manage Your Inventory](#).

Let users view the Inventory tab (Android and iOS)

Users view and update their inventory, log inventory consumption, and request parts from the Inventory tab. To see the Inventory tab, app users need to be active service resources who are associated with a mobile inventory location.

Locations represent physical areas where products are stored. Because field service workers typically bring products with them in their vehicle, you can create a special type of location to represent their inventory.

1. From the full Salesforce site, click the Service Resources tab.
2. Click **Edit** on the service resource associated with the user in question.
3. In the Location lookup field, enter a location on which both **Inventory Location** and **Mobile Location** are selected. These settings mean that the location is mobile, like a service vehicle or toolbox, and can be associated with inventory. If you don't see the Location field, add it to your service resource page layout.

Here's a location with **Inventory Location** and **Mobile Location** both selected.

EDITIONS

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USER PERMISSIONS

To update page layouts:

- Customize Application

To update connected apps:

- Customize Application

AND either

Modify All Data

OR

Manage Connected

Location
Service Van 42

Location Type
Van

Related **Details**

Information

Location Name Service Van 42	Visitor Address
Location Type Van	Time Zone (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Description Standard service van	Driving Directions
Parent Location	Inventory Location <input checked="" type="checkbox"/>
	Mobile Location <input checked="" type="checkbox"/>

And here's a service resource associated with that location. Because this service resource is associated with the location, they'll see the Inventory tab in the app.

Service Resource
Sita Nagappan-Alvarez

User: Sita Nagappan-Alvarez Resource Type: Technician Active:

Related **Details**

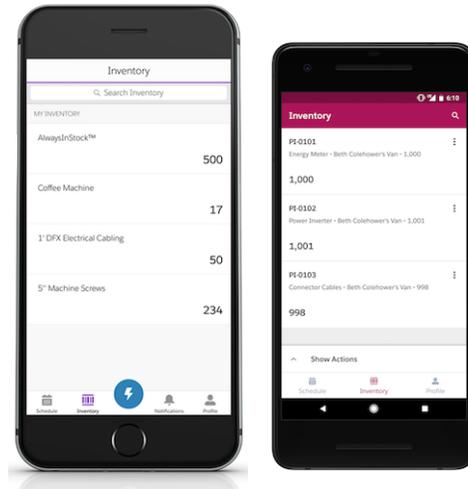
Information

Name Sita Nagappan-Alvarez	Active <input checked="" type="checkbox"/>
User Sita Nagappan-Alvarez	Include in Scheduling Optimization <input type="checkbox"/>
Resource Type Technician	Location Service Van 42
Description	Capacity-Based <input type="checkbox"/>
	Service Crew <input type="checkbox"/>

Let users manage their inventory (iOS and Android)

After a service resource is associated with a mobile inventory location, create *product items* to represent the stock in their service vehicle. Each product item is linked to a location, such as a van or warehouse, and to a specific product, indicating the item being stored. Create product items so you can track inventory usage and restock when necessary.

1. From the Product Items tab in the full Salesforce site, create product items whose Location is the mobile inventory location associated with the service resource. For example, if Service Van 42 contains 30 batteries, create a product item associated with the Service Van 42 location and the Battery product. For help creating product items, see [Create Parts](#).
2. If you want your team to be able to create or update the product items representing their inventory, assign the object permissions listed in [Create Parts](#).



Let users log product consumption (Android and iOS)

To allow your team to create product consumed records from the field service app, make the following configurations.

1. Ensure that the user is an active service resource who is associated with a mobile inventory location.
2. Add the Products Consumed related list to the work order page layout so it is visible in the Products and Related tabs of the work order carousel.
3. Assign the user the object permissions listed in [Track Consumed Parts](#).

 **Note:** Android and iOS users can consume—via the Products Consumed related list—only one serialized product item per product per work order. For example, you may have multiple product items that are assigned serial numbers and that are all associated with your Inverter product. An app user can add only one of them as a product consumed on a specific work order. This limitation doesn't apply to non-mobile platforms.

Let users log product consumption from multiple locations (Android and iOS)

By default, the products consumed on a work order or work order line item must all be associated with the same location via the product item field. In other words, a work order can't have one product consumed linked to a product item associated with the Warehouse A location, and a second product consumed whose product item is associated with the Service Van 42 location. Users searching for product items when creating a product consumed just see product items associated with their mobile inventory location.

If you'd like remove this location limitation, change a setting in the Field Service Lightning connected app for iOS or Android.

1. From Setup, enter *Connected Apps* in the Quick Find box, then select **Connected Apps**.
2. Click **Salesforce Field Service for iOS** or **Salesforce Field Service for Android**.
3. Scroll to the custom attribute list near the bottom of the page and click **New**.
4. Enter the attribute key `ENABLE_MULTIPLE_LOCATIONS`.
5. To enable consuming parts from multiple locations, enter the attribute value `TRUE`. To disable this feature once you've enabled it, instead change the attribute value to `FALSE`.

When this setting is enabled, users see the following in their product item search results:

- Product items in locations that belong to the same hierarchy as the user's own location
- Product items in locations that are associated with a work order on the user's schedule
- Product items in locations that are associated with the user's service territory

 **Note:** Consuming products from multiple locations is supported for:

- Up to 10 hierarchical locations or up to 10 cross border locations, sorted by last modified date, and
- Up to 1,000 product items returned for each location

Let users request products (Android and iOS)

Allow your team to create product requests when their stock is running low.

1. Add the Product Requests related list to work orders and work order line items.
2. Add the product request + icon to the Inventory tab:
 - a. From the Global Actions page in Setup, create an action with the following settings:
 - Action Type: *Create a record*
 - Target Object: *Product Request*
 - Standard Label Type: **None**
 - b. Add the action to the Quick Actions in the Salesforce Classic Publisher section of your global publisher layout.
 - c. Optionally, create a custom action to let users create product request line items.
 - i. From the Object Manager in Setup, select **Product Request**, then click **Buttons, Links, and Actions**.
 - ii. Create an action with the following settings:
 - Action Type: *Create a record*
 - Target Object: *Product Request Line Item*
 - Standard Label Type: **New Record**

3. Assign the user permissions listed in [Request Parts](#).

The app displays a visual indicator when a user's van stock has insufficient products to complete the appointment.

Let users add required products (iOS only)

If a particular product is needed to complete a work order or work order line item, add it as a required product. To let your team create product required records, make the following configurations.

1. Add the Products Required related list to work order and work order line item page layouts.
2. Assign the user the object permissions listed in [Track Required Parts](#).

SEE ALSO:

[Set Up and Manage Your Inventory](#)

Customize the Field Service Lightning Mobile App

Learn how to customize the Field Service Lightning mobile app's screens, actions, and branding settings, and create unique mobile experiences for different user profiles.

Important:

- Users must re-log in to the app to receive metadata updates like page layout changes.
- Salesforce doesn't recommend manually deleting metadata. If the mobile device goes offline immediately after metadata is deleted, data may not be available until the device is back online. After metadata is deleted, refresh all application tabs—Schedule, Inventory, and Profile—by pulling down on each screen.

IN THIS SECTION:

[Customize the Field Service Lightning Mobile App by User Profile](#)

Assign unique configurations of mobile app settings to different user profiles to accommodate the needs of contractors, supervisors, and other app users.

[Customize Screens in the Field Service Lightning Mobile App](#)

Control which fields users see in the Field Service Lightning mobile app by updating page and search layouts.

[Brand the Field Service Lightning Mobile App](#)

Give the Field Service Lightning mobile app your company's look and feel by customizing the colors used in the user interface. Apply your company colors or optimize the color scheme to compensate for the relative brightness of your mobile workforce's work environments.

[Add a Profile Tab Background Image in the Field Service Lightning Mobile App](#)

Add a Profile Tab Background Image in the Field Service Lightning Mobile App.

[Track Service Resource Geolocation with the Field Service Lightning Mobile App](#)

Use geolocation to get a bird's-eye view of your mobile workforce. You can exclude certain users from geolocation tracking.

[Set Up Custom Actions in the Field Service Lightning Mobile App](#)

Configure quick actions, global actions, flows, and app extensions to help your team work more efficiently from the field. Actions are displayed in a predefined order in the action launcher on record pages in the app.

SEE ALSO:

[Using the Field Service Lightning Mobile App](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

Customize the Field Service Lightning Mobile App by User Profile

Assign unique configurations of mobile app settings to different user profiles to accommodate the needs of contractors, supervisors, and other app users.

For example, you can create a different branding experience for contractors, or assign particular geolocation settings or app extensions to technicians versus supervisors. Alternatively, you can use the same settings configuration for all users.

1. From Setup, enter *Field Service Mobile Settings* in the Quick Find box, then select **Field Service Mobile Settings**.
2. Your org comes with one settings configuration named Field Service Mobile Settings, which is assigned to all user profiles by default.
 - To edit that configuration, click **Edit**.
 - To create a new configuration of mobile settings that can be assigned to different user profiles, click **New**.
3. Update the label if desired.
For example, you might want two settings configurations named *Supervisor Settings* and *Technician Settings*, respectively.
4. Update the settings as needed.

 **Tip:** To give app users edit access to their field service records, select **Enable Full Edit on Records**. If you want to restrict editing from the mobile app, don't select this option.
5. Click **Save**.
6. Click **Mobile Settings Assignment**, then click **Edit Assignment** to assign your settings configurations to user profiles.

SEE ALSO:

[Brand the Field Service Lightning Mobile App](#)

[Track Service Resource Geolocation with the Field Service Lightning Mobile App](#)

[Set Up Custom Actions in the Field Service Lightning Mobile App](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To configure Field Service Mobile Settings:

- Customize Application

Customize Screens in the Field Service Lightning Mobile App

Control which fields users see in the Field Service Lightning mobile app by updating page and search layouts.

Records in the Field Service Lightning mobile app display the first four fields in the corresponding page layout. Some fields are hard-coded, meaning they are shown in the app regardless of their place in the page layout.

Important:

- When you update metadata like a page layout, users must log out and log into the Field Service Lightning mobile app to see the changes.
- Not all field types are supported in the Field Service Lightning app. Review [Supported Data Types in the Field Service Lightning Mobile App](#) before you configure your layouts.

Screen in the mobile app	Page Layout	Details
Absences	Absences related list on the Service Resource page layout	You can reach the Absences screen from the Profile screen. Resource absences are displayed differently in the app based on whether the start time and end time fields are included in the related list layout.
Inventory	(Android) Product item search layout iOS isn't controlled by the page layout.	The Inventory tab represents the items in the user's inventory. It shows product items associated with the user's service resource record. Service resources only see the Inventory tab if they're associated with a mobile inventory location (which represents their service vehicle). See Let Users Manage Inventory from the Field Service Lightning Mobile App . On iOS, the Inventory tab doesn't use the Product Item search layout and can't be customized.
Products	Product search layout	Users need to be able to find products to create product requests and product items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To modify page layouts:

- **Customize Application**

To create custom list views:

- **Read on the type of record included in the list**
AND
Create and Customize List Views

To create, edit, or delete public list views:

- **Manage Public List Views**

Screen in the mobile app	Page Layout	Details
		<p>Users viewing products in the app see the <code>Product Name</code> field and the top 3 fields in the search layout.</p> <p> Tip: Consider adding fields like <code>Product Description</code> and <code>Product Code</code> to your search layout. The search terms your users enter are tokenized and searched for across the first four fields in the product search layout.</p>
Products Consumed	Products Consumed related list on the Work Order page layout	You can reach the Products Consumed screen from the Related tab or the Products tab in the work order carousel.
Record Highlight for any record	Compact Layout of the record (for example, Service Appointment Compact Layout)	A record highlight is a preview of a record. The top-most field in a record's compact layout is displayed prominently.
Schedule	<ul style="list-style-type: none"> Layout selected in the <code>Default List View Developer Name</code> field on the Field Service Mobile Settings assigned to the user's profile. (If no list view is specified) Service Appointment search layout 	<p>The Schedule tab lists service appointments assigned to the user.</p> <p>For details, see Customize the Schedule Tab.</p> <p> Tip: The <code>Default List View Developer Name</code> is the name of the list view that shows when the mobile Service Appointment page is first opened. If the <code>Default List View Developer Name</code> isn't defined, mobile users see their service appointments within the date picker range. This list and the list defined are available offline. However, there isn't an option to change to another list view on the mobile device unless the <code>Default List View Developer Name</code> is defined.</p>
Service Appointment		<p>The service appointment screen includes the following fields in the following order:</p> <ul style="list-style-type: none"> First field in the service appointment list view (displayed as a title) Scheduled Start (only visible if the field has a value)

Screen in the mobile app	Page Layout	Details
		<ul style="list-style-type: none"> • First three fields in the service appointment search layout • Address (only visible if the field has a value) • Scheduled End (only visible if the field has a value)
Work Order Overview	<ul style="list-style-type: none"> • First field in Work Order compact layout is in bold in the app • Description field can't be changed and shows a max of 3 lines. • Has up to 5 fields (including the title) displayed in this layout 	You can reach the Work Order Overview screen by tapping a service appointment from the Schedule tab.

IN THIS SECTION:

[Customize the Schedule Tab](#)

The Schedule tab in the Field Service Lightning mobile app shows service appointments that are assigned to the user. The Schedule tab layout is based on a list view specified in Setup. If no list view is specified, it uses the service appointment search layout.

[Customize the Work Order Overview Screen](#)

When a user taps on a service appointment from the Schedule tab, they are taken to the work order overview. You can customize the highlights and cards shown on the work order overview screen.

SEE ALSO:

[Customize the Schedule Tab](#)

[Customize the Work Order Overview Screen](#)

Customize the Schedule Tab

The Schedule tab in the Field Service Lightning mobile app shows service appointments that are assigned to the user. The Schedule tab layout is based on a list view specified in Setup. If no list view is specified, it uses the service appointment search layout.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To modify search layouts:

- Customize Application

To create custom list views:

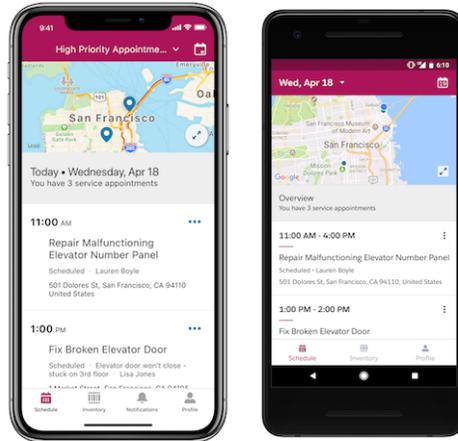
- Read on the type of record included in the list

AND

Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views



You can base the Schedule tab on a list view. Using a list view allows you to set criteria to filter the records that appear to app users.

1. Create a service appointment list view with up to four fields. Set filter criteria to filter the records according to your use case. Note the API name of the list view.
2. From Setup, enter *Field Service Mobile Settings* in the **Quick Find** box, then select **Field Service Mobile Settings**.
3. Click **Edit** next to the mobile settings configuration you want to define the list view for.
4. In the **Default List View Developer Name** field, enter the API name of the list view you want to use.



Tip: The **Default List View Developer Name** is the name of the list view that shows when the mobile Service Appointment page is first opened. If the **Default List View Developer Name** isn't defined, mobile users see their service appointments within the date picker range. This list and the list defined are available offline. However, there isn't an option to change to another list view on the mobile device unless the **Default List View Developer Name** is defined.

5. Click **Save**.

If no list view is specified in Setup, users viewing service appointments from the Schedule tab see the following fields:

- Scheduled Start
- Scheduled End
- Address
- Top field in the Service Appointment search layout (excluding the previous three).

Considerations for Customizing the Schedule Tab

- If the Schedule tab is based on a list view, including the Scheduled Start field in your list view lets app users see a date picker with a range of 45 days before and after the current date. If the list view doesn't include this field, users just see a single Schedule tab of the user's appointments based on your filter criteria, as it would appear on the full Salesforce site.
- Lookup fields, like Account, aren't supported on the Schedule tab and won't show up.
- The app prominently displays the top two fields of the service appointment search layout, so consider which fields your mobile workforce needs to see on the Schedule tab. Many users, for example, may prefer to see **Subject** instead of the service appointment ID. **Scheduled Start** and **Address** are displayed in the same location regardless of the list view or search layout settings
- Multi-day appointments appear on the Schedule tab in the following way:

- If a multi-day appointment includes both a Scheduled Start and Scheduled End, the appointment appears on the schedule for every day between those two dates and includes a visual progress bar representing the job’s scheduled completion.
- If a multi-day appointment includes a Scheduled End but not a Scheduled Start, the appointment appears on the schedule every day until the Scheduled End date.
- If a multi-day appointment includes a Scheduled Start but not a Scheduled End, the appointment appears on the schedule every day after the Scheduled Start date until the appointment is complete.

SEE ALSO:

[Customize the Work Order Overview Screen](#)

[Field Service Lightning Mobile App Limitations](#)

Customize the Work Order Overview Screen

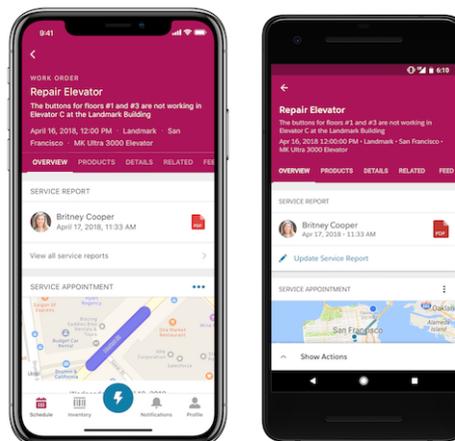
When a user taps on a service appointment from the Schedule tab, they are taken to the work order overview. You can customize the highlights and cards shown on the work order overview screen.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.



 **Important:**

- When you update metadata like a page layout, users must log out and log into the Field Service Lightning mobile app to see the changes.
- Not all field types are supported in the Field Service Lightning app. Review [Supported Data Types in the Field Service Lightning Mobile App](#) before you configure your layouts

Customize the work order highlights

A preview of the work order is anchored to the top of the work order overview screen. This preview shows the first five fields in the work order compact layout, though the Description field counts as one of the five. The first field in the compact layout appears in bold and is used as the title of the work order overview. The Description field appears below the title and is followed by the next three fields in the compact layout.

to update the work order compact layout

1. From the Object Manager in Setup, select **Work Order**.
2. Click **Compact Layouts**.
3. Click the name of the compact layout and edit the layout as desired.
4. Save your changes.

Navigate the work order carousel

The horizontal work order carousel lets users switch between the following views:

- **Overview:** Shows work order cards
- **Products:** Where users manage required and consumed products
- **Details:** Shows all supported fields on the work order page layout
- **Related:** Shows all related lists on the work order page layout
- **Feed:** Shows the Chatter feed if feed tracking is enabled
- **Location:** Shows work in the same location as the current appointment.

Add cards

On the Overview tab in the work order carousel, users see information about the work order and its child records. The information appears in cards, which are discrete spaces for different kinds of information. The following cards can be added to the work order overview screen.

Card	Description	How to display and customize it	Available in
Asset Service History	Provides context about the maintenance history of an asset. It shows the asset associated with the current work order and lists the asset's three most recent work orders, with a link to view all associated work orders.	In iOS, if the work order isn't associated with an asset, the Asset card is blank. If the work order does list an asset, the Asset card shows the top field on the work order is filled out, this card is empty. This card displays the first four fields in the work order search layout. The first field in	Android and iOS

Card	Description	How to display and customize it	Available in
		<p>the layout serves as the title, and the second as the subtitle.</p> <p>In Android, this card displays the first four fields in the Work Orders related list on the asset page layout. The first field is displayed prominently.</p>	
Contact	Shows the contact's name and photo and gives the option to call, message, or email the contact.	This card shows the following fields and options and can't be customized: Customer Name, Phone, Message, Email. If no contact is specified, this card is empty in iOS.	Android and iOS
Knowledge	Shows knowledge articles that are attached to the work order, with a snippet of each article included.	In iOS, the Knowledge card is only visible if an article is attached to the work order.	iOS only
Service Appointment	Shows a map and the option to navigate to the address of the appointment. If the address is not set, the card instead presents the user with the option to set the address, and then activate navigation.	<p>If the work order has one or more service appointments, the Service Appointment card is visible.</p> <p>The following fields on this card cannot be removed from it: Start Time, End Time, Date, Address, ETA (estimated time of arrival).</p>	Android only
Service Report	Displays service reports associated with the work order's service appointments.	If a service report has been previously generated, the Service Report card appears at the very top of the Overview tab, and there is no option to create a service report. If no service report has been generated, the card appears at the bottom of the Overview tab and includes an option to create a service report.	Android and iOS

Card	Description	How to display and customize it	Available in
Work Order Line Item	Shows a visual progress indicator for the work order and lists its work order line items. iOS users with the proper permissions can tap the + icon to create new line items. For details, see Let Users Create Work Order Line Items from the Field Service Lightning Mobile App .	<p>If the work order has work order line items, the Work Order Line Item card is visible.</p> <p>In Android, this card displays four fields for each line item: the Work Order Line Item Number field, followed by the first three fields in the Work Order Line Items related list on the work order page layout.</p> <p>In iOS, this card displays two fields for each line item, which are the first two fields in the Work Order Line Items related list on the work order page layout.</p>	Android and iOS

SEE ALSO:

[Customize the Schedule Tab](#)

[Set Up Custom Actions in the Field Service Lightning Mobile App](#)

Brand the Field Service Lightning Mobile App

Give the Field Service Lightning mobile app your company's look and feel by customizing the colors used in the user interface. Apply your company colors or optimize the color scheme to compensate for the relative brightness of your mobile workforce's work environments.

1. From Setup, enter *Field Service Mobile Settings* in the Quick Find box, and select **Field Service Mobile Settings**.
2. Click **Edit** next to the mobile settings configuration you want to modify, or **New** to set up a new settings configuration.

Each configuration can be assigned to one or more user profiles.

3. Under Branding Colors, update the hex color code of each setting as needed

The table below lists default values and explains where each color is used.

 **Important:** Each value must consist of the # symbol followed by six letters or numbers.

4. When you have entered values for every token you wish to modify, click **Save**.

Users must log out and log in to the app to see changes to branding.

 **Note:** iOS app users that enable the Dark Theme from the in-app settings override the custom branding colors for most UI elements.

Token Name	Description	Default Value
Navbar Background Color	The color of the top bar in the app.	#FCFCFC
Navbar Inverted	The secondary color of the top bar in the app.	#000000
Brand Inverted Color	The color of toasts and the contrast color for the floating action button.	#FFFFFF
Feedback Primary Color	The color of error messages.	#C23934
Feedback Secondary Color	The color of success messages.	#007FAA
Feedback Selected	The color indicating the user's current selection.	#803ABE
Primary Brand Color	The main branding color used throughout the UI.	#803ABE
Secondary Brand Color	The color of action buttons.	#2F81B7
Contrast Primary Color	The color of primary text.	#000000
Contrast Secondary Color	The color of secondary text.	#444444
Contrast Tertiary Color	The color of the icons on the settings screen and of primary lines that delineate different areas of the UI.	#9FAAB5

EDITIONS

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USER PERMISSIONS

To customize branding colors:

- Customize Application

Token Name	Description	Default Value
Contrast Quaternary Color	The color of secondary lines that delineate different areas of the UI.	#E6E6EB
Contrast Quinary Color	The color of primary backgrounds in the UI.	#F8F8F8
Contrast Inverted Color	The color of secondary backgrounds in the UI.	#FFFFFF

SEE ALSO:

[Add a Profile Tab Background Image in the Field Service Lightning Mobile App](#)

[Customize the Field Service Lightning Mobile App by User Profile](#)

[Track Service Resource Geolocation with the Field Service Lightning Mobile App](#)

Add a Profile Tab Background Image in the Field Service Lightning Mobile App

Add a Profile Tab Background Image in the Field Service Lightning Mobile App.

- Upload your image as a static resource.
 - From Setup, enter *Static Resources* into the **Quick Find** box and click **Static Resources**.
 - Click **New**.
 - Give the static resource a name, like *background_banner*. Remember the name, since you need to use it in a later step.
 - Select an image file for upload. An image sized at 3072 x 819 pixels leads to the best results on large displays such as iPads in landscape mode. However, if your users often encounter slow mobile networks, consider using a smaller image.
 - Click **Save**.
- Create a custom attribute to use the static resource on every user's Profile tab.
 - From Setup, enter *Connected Apps* into the **Quick Find** box, then select **Connected Apps**.
 - Select **Salesforce Field Service for iOS** or **Salesforce Field Service for Android**.
 - Scroll down to the list Custom Attributes and click **New**.
 - For the attribute key, enter *COMPANY_PROFILE_IMAGE_RESOURCE_NAME*.
 - For the attribute value, enter the name of the static resource you created surrounded by quotation marks.

 **Tip:** If you named your static resource *background_banner*, your attribute value is "*background_banner*".
 - Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

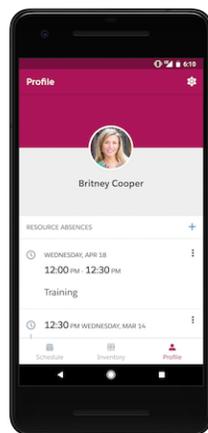
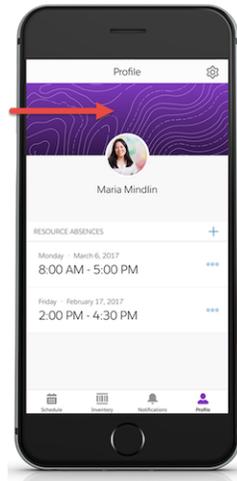
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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To set the company profile image:

- Customize Application



SEE ALSO:

[Brand the Field Service Lightning Mobile App](#)

[In-App Profile Settings in the Field Service Lightning Mobile App](#)

Track Service Resource Geolocation with the Field Service Lightning Mobile App

Use geolocation to get a bird's-eye view of your mobile workforce. You can exclude certain users from geolocation tracking.

When service resource tracking is enabled, the Field Service Lightning mobile app uploads the geolocation of app users to Salesforce at regular intervals. Enable service resource tracking in Setup.

1. From Setup, enter *Field Service Settings* in the **Quick Find** box, and select **Field Service Mobile Settings**.
2. Click **Edit** next to the settings configuration you want to update.
3. Under **Additional Settings**, check **Collect Service Resource Geolocation History**.
4. Enter values in the following fields.

 **Note:** Higher precision or higher frequency settings increase battery consumption on mobile devices.

- **Geolocation Update Frequency in Minutes:** Controls how often geolocation is polled when the app is running in the foreground.
- **Geolocation Update Frequency in Minutes (Background Mode):** Controls how often geolocation is polled when the app is running in the background.
- **Geolocation Accuracy:** Controls the accuracy of the geolocation data collected when the app is running in the foreground. Choose from the following values:
 - **Fine:** 10 meters
 - **Medium:** 100 meters
 - **Coarse:** 1 kilometer
- **Geolocation Accuracy (Background Mode):** Controls the accuracy of the geolocation data collected when the app is running in the background. Choose from the following values:
 - **Medium:** 100 meters
 - **Coarse:** 1 kilometer
 - **Very Coarse:** The app doesn't poll for geolocation data, and geolocation coordinates update only when another app polls for geolocation. The accuracy of the geolocation data depends on the accuracy setting of the application that triggers the geolocation poll.

5. Click **Save**.

Geolocation tracking is now enabled!

What if you want to exclude specific service resources from tracking? For example, if not all members of your workforce are legally protected against geolocation tracking.

Individual mobile users can turn off location tracking for the Field Service Lightning mobile app from their phone's operating system settings. To exclude them from tracking at the admin level:

1. From Setup, enter *Permission Sets* into the **Quick Find** box and select **Permission Sets**.
2. Create a separate permission set for users that you wish to exclude from geolocation tracking. Clone your Field Service Standard permission set and give it a new name.
3. From the settings of your new permission set, click **System Permissions**.
4. Click **Edit** and select **Exclude Technician from Geolocation Tracking**.

EDITIONS

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USER PERMISSIONS

To configure resource tracking:

- Customize Application

To assign permission sets:

- Assign Permission Sets

5. Click **Save**.
6. Click **Manage Assignments**, and then click **Add Assignment**.
7. Select the users that you wish to exclude from geolocation tracking, and then click **Assign**.

SEE ALSO:

[Calculating Address Geolocation in Field Service Lightning](#)

Set Up Custom Actions in the Field Service Lightning Mobile App

Configure quick actions, global actions, flows, and app extensions to help your team work more efficiently from the field. Actions are displayed in a predefined order in the action launcher on record pages in the app.

IN THIS SECTION:

[Which Actions Appear in the Field Service Lightning Mobile](#)

Learn which actions are visible in the Android and iOS app action launcher.

[Create Quick Actions for the Field Service Lightning Mobile App](#)

Add quick actions to object page layouts so your mobile workforce can quickly create and edit records, send messages to contacts, and more.

[Let Users Create Work Order Line Items from the Field Service Lightning Mobile App](#)

Help your team stay organized in the field by letting them create work order line items to split work orders or work order line items into sub-tasks. This feature is available in the Field Service Lightning mobile app for iOS, but not for Android.

[Create App Extensions for the Field Service Lightning Mobile App](#)

Create app extensions to let users pass data from the Field Service Lightning app to another app.

[Add Flows to the Field Service Lightning Mobile App](#)

Guide your team through mobile flows in which they can view information, create and update records, and trigger input-based actions. Create, activate, and manage flows for the Field Service Lightning mobile app in the drag-and-drop Cloud Flow Designer.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To create quick actions and add them to page layouts:

- Customize Application

Which Actions Appear in the Field Service Lightning Mobile

Learn which actions are visible in the Android and iOS app action launcher.

Actions on the Work Order Overview Screen

The work order overview screen has a consolidated action list for service appointments and work orders. When a user clicks the action button from the work order overview screen, they see a list of actions found on the page layouts of those objects. The action launcher displays actions in the following order:

1. App extensions and flows scoped to work orders (sorted alphanumerically).
2. First 8 quick actions in `Salesforce Mobile and Lightning Experience Actions` or `Quick Actions in the Salesforce Classic Publisher` on the work order page layout, following the order in the layout.
3. Hard-coded actions for work orders such as **Edit** and **View Detail**.

Actions on the Service Appointment Overview Screen

On the service appointment overview screen, the action launcher includes a consolidated list of actions for service appointments, work orders, and work order line items. Actions appear in the following order:

1. **Create Service Report**: Only visible if an alternate service closure flow isn't configured and the service appointment page layout includes the Service Reports related list.
2. Field service app extensions for service appointments.
3. Field service app extensions for work orders.
4. Quick actions for service appointments.
5. Quick actions for work orders or work order line items, depending on whether the parent record is a work order or a work order line item.
6. **Edit Work Order** or **Work Order Line Item**, depending on whether the parent record is a work order or a work order line item
7. **Open in Salesforce**, only visible if the Salesforce app is installed on the mobile device.

 **Tip:** Think carefully about which actions to make available to your users.

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Create Quick Actions for the Field Service Lightning Mobile App

Add quick actions to object page layouts so your mobile workforce can quickly create and edit records, send messages to contacts, and more.

Users viewing records can call a quick action by tapping the action from the action launcher. Quick actions are assigned to record page layouts. For example, you can add a Create Opportunity action to the contact page layout to let users create an opportunity from any contact record in the app.

Create a work order quick action and add it to the work order overview screen.

 **Tip:** You can follow these steps for any field service object available in the app.

1. From the Object Manager in Setup, click **Work Orders**, then click **Buttons, Links, and Actions**.
2. Click **New Action**.
3. Configure an action to either create or edit a record, and save your changes.
4. From the Object Manager, click **Page Layouts** under Work Orders.
5. Click the work order page layout.
6. From the layout editor, select **Quick Actions**.
7. Drag your newly created action into the `Quick Actions in the Salesforce Classic Publisher` section.
8. Save your changes.

The action will be visible in the app and on the full Salesforce site.

 **Note:** The app supports quick actions of the types Create a Record and Update a Record. Lightning Component, Visualforce, and custom override actions aren't supported.

SEE ALSO:

[Quick Actions](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To create quick actions and add them to page layouts:

- Customize Application

Let Users Create Work Order Line Items from the Field Service Lightning Mobile App

Help your team stay organized in the field by letting them create work order line items to split work orders or work order line items into sub-tasks. This feature is available in the Field Service Lightning mobile app for iOS, but not for Android.

1. Create a quick action to create a work order line item.
 - a. From the Object Manager in Setup, select **Work Order**, and then click **Buttons, Links, and Actions**.
 - b. Click **New Action**.
 - c. Select the action type **Create a Record**.
 - d. Select the target object **Work Order Line Item**.
 - e. Select the standard label type **New Child [Record]**.
 - f. Enter a label, such as *New Line Item*.
This automatically generates the API name.
 - g. Add a description, such as *Create a work order line item*.
 - h. Select whether or not to create a Chatter feed post when the action is used.
 - i. Optionally, enter a success message that will show when the user creates a line item.
 - j. Save your changes.
2. Add your quick action to the work order page layout.
 - a. From the Object Manager in Setup, select **Work Order**, then click **Page Layouts**.
 - b. Click **Work Order Page Layout**.
 - c. In the layout editor, select **Quick Actions**.
 - d. Drag your newly created action into **Quick Actions in the Salesforce Classic Publisher**.
 - e. Save your changes.

When this action is added to the layout, iOS users see a + icon in the Work Order Line Item card on work orders and work order line items. Users can tap the icon to create a new work order line item.

EDITIONS

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USER PERMISSIONS

To create quick actions and add them to work order line item page layouts:

- Customize Application

Create App Extensions for the Field Service Lightning Mobile App

Create app extensions to let users pass data from the Field Service Lightning app to another app.

Important: If **Use Salesforce Mobile Actions** is selected on the Field Service Settings page in Setup, app extensions aren't visible in the app.

App Extension Type	Supported in Android	Supported in iOS
Android	Yes	Yes
iOS	No	Yes
Lightning Apps	Yes	Yes
Web apps	No	Yes
Workflow	No	Yes

To set up an app extension follow the steps below.

- Gather information about the app you want to connect.
 - From Setup, enter *Navigation* in the *Quick Find* box, then select **Salesforce Navigation**.
 - Note the exact name of the app from the list of Available and Selected Apps.
You need to use this name as the Launch Value when creating your Lightning app extension.
- Create your app extension.
 - From Setup, enter *Field Service Mobile Settings* in the *Quick Find* box, then select **Field Service Mobile Settings**.
 - Click **Edit** next to the mobile settings configuration that needs the app extension.
 - Under App Extensions, click **Add**.
 - Fill out the fields.
 - Field Service Mobile Settings:** Automatically populated. The mobile settings configuration that uses the app extension.
 - Type:** A picklist of app extensions types.
 - Label:** The label as it appears to users in the app. The label isn't localized automatically.
 - Name:** The extension's name.
 - Scoped To Object Types:** The records from which a user can activate an app extension. Scoping an app extension to an object lets users activate that app extension from records of the specified type. The object names are entered as comma separated values and cannot include spaces. For example, to scope an extension to the Work Order object and the Service Appointment object, enter *WorkOrder, ServiceAppointment*. To create a global app extension so users can activate it from any record, leave this field blank.
 - Launch Value:** The name of the app as it appears on the Salesforce Navigation page. This field directs the app to the appropriate app extension.
 - Click **Save**.

EDITIONS

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USER PERMISSIONS

To create and modify App Extensions:

- Customize Application

**Warning:**

- The Salesforce app doesn't support parameters passed through Lightning app extensions. Therefore, when you can't pass parameters from Field Service Lightning with a Lightning app extension to the Salesforce app.
- The Salesforce app can launch and accept parameters for Visualforce pages exposed as a Lightning Page Tab. However, the Lightning Page Tab name can't have any spaces in it.

Passing Tokens Into the Launch Value

The launch value supports static URLs for web addresses as well as dynamic values that you can represent with certain tokens. These tokens can pass field information from the record that the user is currently viewing. For example, if the user is viewing a service appointment, the tokens can be used to pass the data from any field on that service appointment to the app extension. The basic format for these tokens is based on the names of the field, like so: **{!\$Name}**.



Tip: The following example uses a token to dynamically pass a custom text field that is on a work order into to a Google search. The token is written in bold for clarity: [https://www.google.com/#q={!\\$WO_Custom_Text_Field__c}](https://www.google.com/#q={!$WO_Custom_Text_Field__c})

Configuring Lightning App Extensions

You can find all the Lightning apps that are configured in your org from inside Setup. Once you have found the name of the Lightning app that you wish to connect to Field Service Lightning Mobile App, you can create your app extension by using the name of a Lightning app on this list as the launch value of your Lightning app extension.

1. From Setup, type *Navigation* into the Quick Find box, and select **Salesforce Navigation**.
2. Note the exact name of the Lightning App from the list of Available and Selected apps. You need to use this name as the Launch Value when creating your Lightning app extension for the Field Service Lightning Mobile App.

Add Flows to the Field Service Lightning Mobile App

Guide your team through mobile flows in which they can view information, create and update records, and trigger input-based actions. Create, activate, and manage flows for the Field Service Lightning mobile app in the drag-and-drop Cloud Flow Designer.

IN THIS SECTION:

[Connect a Flow to the Field Service Lightning Mobile App](#)

Flows are connected to the Field Service Lightning mobile app using app extensions. Learn how to set up an app extension that leads to a flow.

[Create a Flow to Capture Images in the Field Service Lightning Mobile App](#)

Create a flow that your team can use to capture images from the Field Service Lightning mobile app. For example, make it easy for technicians to save photos of a customer's asset before and after service. Image capture flows are supported in both iOS and Android starting with version 4.0 of the app

[Create a Flow to Capture Customer Signatures on Service Reports](#)

You can specify a special type of flow for wrapping up a service appointment. This special flow appends a final step to capture a customer's signature, and is available only for the Field Service Lightning mobile app for iOS.

[Considerations for Using Flows in the Field Service Lightning Mobile App](#)

Review flow considerations and limitations before using flows in the Field Service Lightning mobile app.

EDITIONS

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USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- Manage Flow

To run flows from the app:

- Run Flows

Connect a Flow to the Field Service Lightning Mobile App

Flows are connected to the Field Service Lightning mobile app using app extensions. Learn how to set up an app extension that leads to a flow.

1. Create your flow in the [Cloud Flow Designer](#).

To make your flow actions easy and useful for your team, follow these best practices.

- Include help text on each screen to help users understand what is expected of them.
- Don't ask more than one question per screen, especially if a screen involves picklists.

2. After the flow is created, connect it to the Field Service Lightning app.

- From Setup, type *Field Service Mobile Settings* into the `Quick Find` box, and click **Field Service Mobile Settings**.

 **Important:** Only the user profiles assigned to the mobile settings configuration you select will have access to the flow. To manage user profile assignments, click **Manage Assignments** on the Field Service Mobile Settings page.

- Click **Edit** next to the mobile settings configuration that needs the flow.
- Under App Extensions, click **Add**.
- Enter a label for your app extension. This label is what your users see in the user interface.
- For `Type`, select **Flow**.
- Enter a `Name` that expresses the purpose of the flow.
- In the field `Scoped to Object Types`, which controls where users can find and activate the flow, enter the API name of the desired object.
If you want to scope the flow to multiple objects, add a comma between object names with no space. For example, entering *WorkOrder, Contact* means users can activate that flow from the detail page of a work order or contact.
To create an unscoped flow action in which users can activate the flow from multiple screens, leave this field blank.
- For `Launch Value`, enter the unique name of your flow.
- Click **Save**.

SEE ALSO:

[Cloud Flow Designer](#)

EDITIONS

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USER PERMISSIONS

To view, edit, or create a flow in the Cloud Flow Designer:

- Manage Flow

To run flows from the app:

- Run Flows

Create a Flow to Capture Images in the Field Service Lightning Mobile App

Create a flow that your team can use to capture images from the Field Service Lightning mobile app. For example, make it easy for technicians to save photos of a customer's asset before and after service. Image capture flows are supported in both iOS and Android starting with version 4.0 of the app.

1. Before building a flow, verify that Lightning Runtime is enabled for flows.
Find this setting on the Process Automation Settings page in Setup.
2. In Setup, enter *Flows* in the *Quick Find* box and click **Flows**.
3. Click **New Flow**.
4. Using the flow designer, drag a **Screen** element onto the canvas.
5. Name the screen and leave all other options with their default setting.
6. Select the **Add a Field** tab, and double-click **Lightning Component** to add a Lightning component field.
7. Click the newly created Lightning component field.
8. In *Unique Name*, enter a name for the field.
9. In the *Lightning Component* picklist select **forceContent:fileUpload**.
10. Select the **Inputs** tab and enter a value for the *File Upload Label*.
This label appears for users in the flow above the image upload component.
11. For *Related Record ID*, select **Create New > Variable**.
12. In *Unique Name* Enter *Id*.
13. For *Input/Output Type*, select **Input and Output**.
14. Click **OK**.
15. Click **Add Row** beneath *Related Record ID*.
16. For *Select Attribute*, select **Allow Multiple Files**.
17. Next to your newly created *Allow Multiple Files* attribute, in the values picklist, select **GLOBAL CONSTANT > \$GlobalConstant.True**.
This setting gives your users the option to upload multiple images.
18. Click **Save**.
19. In the window that appears, enter a name for your flow.
Remember that the *Unique Name* that is automatically generated when you name your flow, because you need the unique name to connect the flow to the Field Service Lightning mobile app.
20. For *Type*, select **Field Service Mobile Flow**
21. To save your flow, click **OK**.

You can now connect the flow to the Field Service Lightning app with an app extension, just like any other flow.

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USER PERMISSIONS

To view, edit, or create a flow in the Cloud Flow Designer:

- Manage Flow

Create a Flow to Capture Customer Signatures on Service Reports

You can specify a special type of flow for wrapping up a service appointment. This special flow appends a final step to capture a customer's signature, and is available only for the Field Service Lightning mobile app for iOS.

This flow is included with the iOS app. To specify this special flow, create an app extension with the following settings:

- **Label:** The text you want to appear in the Actions tab. For example, My Service Report Flow.
- **Type:** Flow
- **Name:** Service_Report_Flow
- **Scoped to Object Types:** ServiceAppointment
- **Launch Value:** The API name of the flow that you want to conclude with signature capture.

Because of the unique API name of the service closure flow, only one of these flows can exist at a time.

Considerations for Using Flows in the Field Service Lightning Mobile App

Review flow considerations and limitations before using flows in the Field Service Lightning mobile app.

Downloading Flow Data

When the app loads a user's schedule data, it also downloads global flows and any flows scoped to records in their schedule data. Pulling down on the screen to sync with Salesforce causes the app to reload flow metadata.

Flow Input Parameters

When the app launches a flow, it passes the following input parameters:

- (iOS and Android) **Id:** The record ID of the record that the flow is launched from.
- (iOS and Android) **UserId:** The ID of the current user.
- (Android) **ParentId:** The record ID of the parent record that the flow is launched from. For example, if a flow is launched from a service appointment, this will be the ID of the parent work order or work order line item

Flow Limitations in the Field Service Lightning Mobile App

- Resources of the type Formula aren't supported.
- Actions in flows cannot rely on the output parameters of an action.
- Returning to a previous screen is not allowed during a flow if the flow includes a loop or subflow.
- The `wasSelected` operator cannot be used in decisions.
- Hardcoded ID values must be 18 digits long. 15-digit values aren't supported.

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- (Android only) Service closure flows aren't supported, so signature capture can't be included as the final step of a flow and must be performed separately.

Using the Field Service Lightning Mobile App

Learn how to install and log into the app, adjust in-app settings, and complete common tasks from the app.

IN THIS SECTION:

[Get the Field Service Lightning Mobile App](#)

The Field Service Lightning mobile app is available to users with the Field Service Mobile license and a supported Android or iOS device. Learn how to install the app and log in.

[Push Notifications in the Field Service Lightning Mobile App](#)

Push notifications alert your mobile workforce to approaching appointments and scheduling changes.

[Offline Priming in the Field Service Lightning Mobile App](#)

Learn what data the Field Service Lightning mobile app downloads for offline work and how the app syncs with Salesforce.

[In-App Profile Settings in the Field Service Lightning Mobile App](#)

Click the gear icon in the top right-hand corner of the Profile tab to view pending uploads, manage linked accounts, and provide feedback to Salesforce about the app.

[Chatter in the Field Service Lightning Mobile App](#)

Chatter is available on work orders only as a way to collaborate on field service jobs. Feed tracking must be enabled to display the Feed tab.

[Create Service Reports in the Field Service Lightning Mobile App](#)

Service reports summarize the work that was performed by a customer, and can be signed by the technician, customer, and others involved in the work. Learn how to configure the Field Service Lightning mobile app to support service report generation and review important considerations about offline service reports and service report previews.

[View Knowledge Articles in the Field Service Lightning Mobile App](#)

Knowledge articles can be attached to work orders, work order line items, and work types to share product specs, instructions, and guidelines with your team.

[Resource Absences in the Field Service Lightning Mobile App](#)

Learn about types of resource absences and how to empower your mobile workforce to log their time off from work.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Get the Field Service Lightning Mobile App

The Field Service Lightning mobile app is available to users with the Field Service Mobile license and a supported Android or iOS device. Learn how to install the app and log in.

To get the app, search for *Field Service Lightning* in [Google Play Store](#) or App Store on your mobile device.

When the app is downloaded, tap it to launch it. Upon launching it for the first time, you'll receive several device permission requests. Approve any requests to let the app:

- Send you notifications
- Access your basic information
- Access your location, which is used in the app's mapping functionality and geolocation tracking for scheduling
- Access your camera

 **Tip:** You can change the device permissions that your device gives the Field Service Lightning app at any time. To do so, navigate to your device's settings, then tap the Field Service Lightning app.

Logging In

When given the option, log in to Salesforce from the app. If prompted, create a passcode for an added level of security. Depending on how your Salesforce org is configured, you may need to enter information for a custom domain, which can be done in two ways:

- Tap **Use Custom Domain** and enter your org's URL.
- Click the gear icon in the top right of the login screen to specify production or sandbox org, or press **+** to enter a custom domain.

If you're a community user, the first login is slightly different. On the initial login screen, click the settings button in the top right, then add a connection with the URL of your Salesforce community. The URL can be found in Setup under Communities. When entering the community URL, omit `https://`.

SEE ALSO:

[Field Service Lightning Mobile App Requirements](#)

[Give Users Access to the Field Service Lightning Mobile App](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

Push Notifications in the Field Service Lightning Mobile App

Push notifications alert your mobile workforce to approaching appointments and scheduling changes.

To enable push notifications for the iOS or Android app:

1. Ensure that the connected app (different from the app itself!) has been downloaded.
 - For iOS: <https://sfdc.co/MobileFieldServicePackage>
 - For Android: <https://sfdc.co/MobileFieldServiceAndroidPackage>
2. Enable notifications in Setup.
 - a. From Setup, enter *Field Service Settings* in the Quick Find box, then select **Field Service Settings**.
 - b. Select **Notify relevant users in Lightning Experience, the mobile app, and the Field Service Lightning mobile app about updates to work orders and service appointments**.
 - c. Save your changes.

Users receive push notifications in the following circumstances.

- A Chatter text post is made on a work order that the user follows.
- A Chatter file post is made on a work order that the user follows.
- A feed-tracked change is made to a work order that the user follows.
- (iOS only) A feed-tracked change is made to a service appointment that the user follows.
- A service appointment is assigned to or away from the user.

 **Note:** Technicians are not automatically added as followers to work orders and service appointment records that they are assigned to. Consider creating an Apex trigger on the service resource object to add or remove users as followers when assignments change.

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Offline Priming in the Field Service Lightning Mobile App

Learn what data the Field Service Lightning mobile app downloads for offline work and how the app syncs with Salesforce.

Syncing your data

When the app is connected to the internet, it regularly synchronizes data with the Salesforce server. If the app goes offline, users see a notification in the top navigation bar.

Any changes made while the app is offline are added to the pending uploads queue in order of occurrence. The queue shows the status of the app's attempts to upload changes to the Salesforce server. To view the queue, tap the top navigation bar when uploads are pending, or go to the in-app settings in the Profile tab. To delete a pending upload, swipe it left and confirm the deletion.

If an error occurs when the app is trying to upload a change to Salesforce, the Pending Uploads queue is paused at that particular upload. Changes further down in the queue may be dependent on a prior change, so the conflict must be resolved before the queue continues to be processed. There is currently no conflict resolution for conflicting changes in the pending uploads queue, so the most recent change uploaded to the Salesforce server takes precedence. Deleting a pending upload is the only way to resolve a conflict.

What is data priming?

When a user logs in to the Field Service Lightning app, it automatically pre-downloads data related to the user's service appointment assignments. This process is known as *priming*, and it ensures that all the data that is relevant to a technician is available to them even if internet connectivity is lost. Priming can take a few moments from the initial launch of the app or when a new user logs onto the app, since the app may have to download a high volume of data.

What gets primed?

The data that the app primes for each user is based on the service appointments that are assigned to a user.

The app primes the following data, with a maximum priming depth of 2 records:

- Any work order that has a service appointment for which the user is an assigned resource
- All work order line items that are on the related list of a primed work order
- The records in the related lists on work orders, work order line items, and assets
- Quick actions for work orders, work order line items, service appointments, and assets
- Records that are referenced by a primed record's related list
- Field Service Mobile flows

Priming rule exceptions

- A maximum of 25 records are primed from a related list. If a related list contains more than 25 records, the 25 most recently modified records are primed. This limit doesn't apply to the Articles related list, which has no limit.
- The Service Reports related list is always primed, even if the related list isn't on the service appointment page layout.
- The app only primes records that are up to two degrees of separation from a service appointment assigned to the user. This limit is called the priming depth, and the app has a priming depth of 2 records. For example, when a user is assigned to a service appointment, the service appointment, its parent record, and its parent record's related records are primed. However, related records on the parent record's related records aren't primed because they're more than two degrees separate from the appointment. So assets in the

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Assets related list on the appointment's parent work order would be primed, but work orders in the asset's Work Orders related list wouldn't be primed.

- Price books aren't primed for offline usage due to performance considerations.

SEE ALSO:

[Field Service Lightning Android and iOS Mobile App Comparison](#)

[Field Service Lightning Mobile App Limitations](#)

In-App Profile Settings in the Field Service Lightning Mobile App

Click the gear icon in the top right-hand corner of the Profile tab to view pending uploads, manage linked accounts, and provide feedback to Salesforce about the app.

View pending uploads

The upload queue shows pending uploads that the app sends to your org when internet access is restored. Each upload represents individual changes to records that the user has made in the order that they made them. If an upload in the queue encounters an error, the queue will pause until the error is resolved. To delete a pending upload, swipe it left and confirm the deletion.

Manage linked accounts

In the account management section, you can log out from your current user profile or log in with a different account.

Give feedback

Tap the feedback button to share your feedback about the app with Salesforce. Your Salesforce admin doesn't receive the feedback you submit.

SEE ALSO:

[Add a Profile Tab Background Image in the Field Service Lightning Mobile App](#)

[Field Service Lightning Mobile App Limitations](#)

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Chatter in the Field Service Lightning Mobile App

Chatter is available on work orders only as a way to collaborate on field service jobs. Feed tracking must be enabled to display the Feed tab.

To show the Feed tab on the work order overview carousel, enable feed tracking on work orders.

1. From Setup, enter *Chatter* into the *Quick Find* box and select **Feed Tracking**.
2. Select **Work Order** from the object list.
3. Check **Enable Feed Tracking**.
4. Click **Save**.

The following Chatter actions are supported in the app.

Action	Supported on Android	Supported on iOS
Create a Chatter post		
Comment on a Chatter post		
Mention a user or group		
Bookmark a Chatter post		
Delete a Chatter post		
Like a Chatter post		
Edit a Chatter post		
Attach a video, image, or PDF to a Chatter post or comment		
View feed-tracked changes on records		

Limitations

- Users can't edit Chatter posts or set Chatter profile images from within the app.
- The Feed tab in iOS is supported only on the work order, work order line item, and case objects. The Feed tab in Android is supported only on the work order and work order line item objects.
- (Android only) Chatter is disabled when the app doesn't have internet connectivity.

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USER PERMISSIONS

To customize fields tracked in feeds:

- Customize Application

To view the field tracking setup page:

- View Setup and Configuration

Create Service Reports in the Field Service Lightning Mobile App

Service reports summarize the work that was performed by a customer, and can be signed by the technician, customer, and others involved in the work. Learn how to configure the Field Service Lightning mobile app to support service report generation and review important considerations about offline service reports and service report previews.

To allow app users to preview and create service reports, make the following configurations.

1. Complete the steps in [Create Service Report Templates](#) to prepare for and create service report templates
2. Ensure that the service appointment page layout includes the Service Reports related list.
3. Add the `Work Type` field to work order and work order line item page layouts, and make sure users have permission to view it.
4. Add the `Service Report Template` field to the work type page layout.
5. (Recommended) Select a service report template in the Service Report Template field on each work type in your org.

Create a Service Report in the App

To create a service report in the app, navigate to a service appointment, work order, or work order line item. Tap the action icon, then tap **Create Service Report**. If the service report template includes a signature section, you're prompted to **Sign & Confirm**. If there isn't a signature section, only a **Confirm** option appears.

In Android, the Create Service Report action appears on the Service Reports card. If a work order already has a service report, users can edit the existing report, but can't create additional reports.

Create a Service Report Offline

Users of the iOS app can create service report previews while offline. Since offline service reports may not have the latest data, they include a watermark indicating that they were created offline. To disable offline service report generation for all iOS users:

1. From Setup, enter Connected Apps in the Quick Find box, then select **Connected Apps**.
2. Click **Salesforce Field Service for iOS**.
3. In the Custom Attributes list, click **New**.
4. Set the Attribute key to `"DISABLE_SERVICE_REPORT_PREVIEW_IOS"`. Be sure to include the quotation marks.
5. Set the Attribute value to `"true"`. Be sure to include the quotation marks.

Limitations

- If a work order has one or more service appointments, app users can create service reports only for the work order's service appointments, not for the work order itself. Clicking **Create Service Report** on the work order overview screen creates a service report that uses the Service Appointment for Work Order sub-template of the selected service report template. The same limitation applies to work order line items with service appointments: the line item's service reports use the Service Appointment for Work Order Line Item sub-template. Users in the full Salesforce site can generate service reports without issue for any work order or work order line item.
- (Android only) Service closure flows aren't supported. This means that signature capture can't be included as the final step of a flow and must be performed separately.
- Service report previews include the following limitations, which don't apply to non-preview service reports:
 - The data in service report previews may be out of date because the app doesn't automatically get the latest data before generating a preview.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise, Performance, Unlimited, and Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To create or edit a Service Report Template:

- Customize Application

- Reference fields aren't populated if they exceed the maximum priming depth of 2.
- If a service report template includes a related list, but the record that the service report is being generated for doesn't have the related list on its page layout, the related list isn't populated.
- Formula field values may be inaccurate in a preview because they aren't dynamically calculated.
- Roll-up summary fields are blank.
- The following elements aren't visible:
 - Cases related list
 - Headers and footers
 - Organization fields
 - Certain data fields
 - Images in rich text fields on a service report template or service appointment, work order, or work order line item page layout

SEE ALSO:

[Create Service Report Templates](#)

[Create a Flow to Capture Customer Signatures on Service Reports](#)

View Knowledge Articles in the Field Service Lightning Mobile App

Knowledge articles can be attached to work orders, work order line items, and work types to share product specs, instructions, and guidelines with your team.

Letting App Users View Knowledge Articles

To let Field Service Lightning mobile app users view knowledge articles:

1. Ensure you have Salesforce Knowledge set up in your org. See [Salesforce Knowledge Implementation Guide](#).
2. Add the Articles related list to work order and work order line item page layouts.

Viewing Articles in the App

To view the Articles related list on a work order, tap **Related** in the work order carousel. Tap the name of an article to view it. The Knowledge card in the work order overview screen also shows articles attached to the work order or work order line item.

Limitations

- (iOS only) Images in knowledge articles display normally if they are hosted outside of Salesforce. Articles that use images uploaded to Salesforce won't load those images. As an alternative, we recommend using an image link that users can open themselves. You can avoid this issue by selecting the option to use POST requests for cross-domain sessions. Find this option on the **Session Settings** page in Setup.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

- (Android only) If a mobile app user's device is running in any of Salesforce's 26 supported languages, the app automatically translates the articles to the language of their mobile device's operating system. Otherwise, the app defaults to English.

SEE ALSO:

[Configure Work Order Settings](#)

[Guidelines for Using Knowledge with Work Orders](#)

Resource Absences in the Field Service Lightning Mobile App

Learn about types of resource absences and how to empower your mobile workforce to log their time off from work.

 **Note:** Read Only users with Read permission on service resources can create resource absences.

To allow users to create, update, and delete absence records from the app, make the following configurations.

1. Add the Absences related list to the service resource page layout, and customize its fields as needed.

 **Tip:** The date picklist values on resource absences are based on the `Picklist Time Interval in Minutes` setting on the Field Service Mobile Settings page in Setup.

2. Ensure that users have Read access to service resources so they can view, create, edit, and delete absences.

Managing Absences in the App

View and manage absences from the Absences card on the Profile tab. Click the + icon to create a resource absence.

The Type field indicates the nature of the time off from work, and comes with the following values:

- Vacation (default)
- Meeting
- Training
- Medical

SEE ALSO:

[Service Resource Fields](#)

More Service Cloud Features

Locate documentation for earlier versions of Service features we've upgraded.

IN THIS SECTION:

[Setting Up Your Self-Service Portal](#)

[Using Zones to Organize Communities](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Field Service Lightning features, managed package, and mobile apps are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. Work orders are also available in **Professional** Edition.

Field Service Lightning mobile users must have the **Field Service Mobile** user license to access the app.

USER PERMISSIONS

To view, create, or update resource absences:

- Read on service resources

To delete resource absences:

- Edit on service resources

[Encourage Idea Creation and Sharing in Salesforce Communities](#)

[Set Up Answers in Communities](#)

[Setting Up Chatter Answers](#)

[Solutions Overview](#)

[Live Agent Console](#)

Setting Up Your Self-Service Portal

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

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

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

- **Jump Start** - Gets you up and running quickly; see [Self-Service Jump Start](#).
- **Self-Service Setup** - Complete setup which allows you more customization.

The setup consists of:

- [Enable Self-Service Features and Settings](#)
- [Customizing Your Self-Service Look and Feel](#)
- [Customizing Your Self-Service Fonts and Colors](#)
- [Customizing Your Self-Service Pages](#)
- [Generating Login HTML](#)
- [Managing Self-Service Users](#)

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

SEE ALSO:

[Getting the Most from Your Self-Service Portal Tip Sheet](#)
[Self-Service Implementation Guide](#)

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To use Self-Service Jump Start:

- Manage Self-Service Portal

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

Self-Service Jump Start

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

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

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

1. From Setup, enter *Self-Service Portal* in the Quick Find box, select **Settings**, then click **Jump Start**.
 2. Review the process and click **Continue**.
 3. Choose a color theme.
 4. Edit the default settings as needed and click **Save**.
 5. Test your Self-Service portal by:
 - a. Clicking **Generate** to retrieve a test username and password.
 - b. Clicking **Access Self-Service Portal** to preview your pages.
 - c. Optionally, click **Invite** to notify other users how to log in and preview your pages.
 6. Enable your Self-Service portal by copying the link provided in the **Enable Self-Service...** section to an appropriate place on your website.
 7. Click **Done** when finished.
 8. Enable your customers to use your Self-Service portal. See [Managing Self-Service Users](#) on page 1058.
-  **Tip:** To make changes to your settings, see [Enable Self-Service Features and Settings](#) on page 1037. The Self-Service Jump Start automatically enables the **Enable Self-Service** button on contact detail pages.

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

[Tip Sheet: Getting the Most from Your Self-Service Portal](#)

[Self-Service Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To use Self-Service Jump Start:

- [Manage Self-Service Portal](#)

Enable Self-Service Features and Settings

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

Setting	Description
	<p>Visible in Self-Service Portal in this category and its subcategories.</p> <p>Leave this blank to let customers view all solutions marked Visible in Self-Service Portal in all categories.</p>
Case Record Type	The record type to assign to any case submitted via the Self-Service portal.
"From" Email Address	<p>The email address from which all new user and password emails will be sent, for example, support@acme.com. When this field is blank, Salesforce uses:</p> <ul style="list-style-type: none"> • The Automated Case User's email address for users who receive an email with a temporary password by clicking Forgot your password? on the Login Page of the Self-Service portal. The Automated Case User is specified on the Support Settings page in Setup. • The email address of the user who last posted a comment for users who receive a case comment notification email.
"From" Email Name	<p>The name that will be associated with the "From" Email Address, for example, "Acme Customer Support." When this field is blank, Salesforce uses:</p> <ul style="list-style-type: none"> • Your organization's name for users who receive an email with a temporary password by clicking Forgot your password? on the Login Page of the Self-Service portal. • The name of the user who last posted a comment for users who receive a case comment notification email.
New User Template	The email template used to send a username and initial password to all newly-enabled Self-Service users. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as "Available for Use."
New Password Template	The email template used to send a new password to existing Self-Service users when you reset their passwords or when they reset their own passwords by clicking Forgot your password? on the Login Page of the Self-Service portal. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as "Available for Use."
Enable Notification Email on New Case Comment	<p>When selected, indicates that the Send Customer Notification option on a case comment is displayed.</p> <p>Even if this checkbox is not selected, the Send Customer Notification option still displays on cases if you have enabled email notifications to contacts who are not members</p>

Setting	Description
	of your Self-Service portal. See Customize Support Settings on page 5.
New Comment Template	The email template used to send a notification to Self-Service users when a public comment is added to one of their cases. Self-Service automatically selects a sample template for you, but you can modify the sample or create your own email template. This template must be marked as "Available for Use." Note that case owners are sent a separate notification that you can't customize.
Enable Case Auto-Response Rules for Self-Service Cases	Indicates if cases submitted through your Self-Service portal will trigger your auto-response rules.
Case Creation Template	The email template to use when cases submitted through your Self-Service portal do not match any auto-response rules.
Maximum Page Width	The maximum pixel width of the Self-Service pages from Salesforce. If hosting the portal yourself, this is the width of the inner HTML frame on your Self-Service login page.
Minimum Page Height	The minimum pixel height of the Self-Service pages from Salesforce.
Style Sheet URL	The complete, publicly accessible URL of your organization's Self-Service style sheet, for example, "http://www.acme.com/styles/selfservice.css." See Customizing Your Self-Service Look and Feel on page 1040. If you use a predefined color theme, leave this field blank.
Color Theme	Use one of Salesforce's color themes if you do not have your own style sheet to use. Click the View link to see template settings. To change the fonts and colors of one of Salesforce's color themes, see Customizing Your Self-Service Fonts and Colors on page 1041.
Case Single Term	Term used on the Self-Service portal instead of "case" (singular form).
Case Plural Term	Term used on the Self-Service portal instead of "cases" (plural form).
Solution Single Term	Term used on the Self-Service portal instead of "solution" (singular form).
Solution Plural Term	Term used on the Self-Service portal instead of "solutions" (plural form).

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

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

[Tip Sheet: Getting the Most from Your Self-Service Portal](#)

[Self-Service Implementation Guide](#)

Customizing Your Self-Service Look and Feel

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

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

1. Customize the headers and footers of the Self-Service pages; see [Create Your Custom Page Header and Footer Sections](#) on page 1050.
2. Customize the Self-Service portal fonts and colors via one of these options:
 - [Choose a predefined color theme or upload your own style sheet](#) on page 1044.
 - [Customize fonts and colors using a point-and-click editor](#) on page 1041.

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

Customizing Your Self-Service Fonts and Colors

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

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

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

2. Select the color theme you want to customize.

From the color theme page, you can:

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

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

From the portal page, you can:

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

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

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

5. Edit the visual element as desired.

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

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

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

For a list of all the page attributes you can edit, see [Self-Service Page Attributes](#) on page 1055.

6. Click **Save** to save all changes to the visual element and its attributes. Customizations are not visible to your Self-Service users until you set the color theme as active.

7. Repeat these steps to customize all visual elements and their attributes as necessary.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

8. Return to the list of color themes by clicking the **Back to All Pages** link and then the **Back to All Themes** link.
9. Click **Set Active Theme**.
10. Select the theme to activate for your portal, live and in real-time. Your organization can only have one active theme.
11. Click **Save**.

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

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

Customizing Your Self-Service Pages

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

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

 **Note:**

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

IN THIS SECTION:

[Preparation for Setting Up Your Portal](#)

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

[Customize the Self-Service Portal Login Page](#)

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

[Customize the Self-Service Portal Home Page](#)

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

[Enable the Solutions Page](#)

[Customize the Self-Service Portal Log a Case Page](#)

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

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To modify Self-Service pages:

- **Manage Self-Service Portal**

AND

Customize Application

[Customize the View Cases Page](#)

[Customize the Suggested Solutions Page](#)

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

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

[Supported HTML Elements and Attributes for Self-Service Portal Customization](#)

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

[Self-Service Page Attributes](#)

[Generating Login HTML](#)

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

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

[Self-Service Page Attributes](#)

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

Preparation for Setting Up Your Portal



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

Before setting up your [Self-Service portal](#):

- **Build your public solutions** - Review and mark your solutions as `Visible in Self-Service Portal`. Only solutions marked `Visible in Self-Service Portal` can appear in the Self-Service portal or the Customer Portal. For your Self-Service portal only, identify the top five solutions you want to feature on the Home Page.
- **Determine the information to show and collect** - Decide which case fields will be available when users view their cases. You should also decide which fields should be required when users submit cases online and which picklist values users can select when they solve their own cases with suggested solutions. (See [Case Fields](#) on page 100.)
- **Designate the portal's location** - Choose where to add your portal's login URL on your corporate website. To locate the login URL for your Self-Service portal, see [Generating Login HTML](#).
- **Customize your portal communication templates** - Decide which email templates to send to users to communicate a variety of information, such as reset passwords, notifications when public comments are added to cases, and case auto-responses with suggested solutions.
- **Customize and distribute the portal tip sheet** - Download the [Using the Self-Service Portal and Customer Portal](#) tip sheet and edit it to match your portal's branding and features, such as suggested solutions and the ability to attach files to submitted cases. Then distribute the document to your customers who want to learn how to answer their own inquiries using your portal.

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

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

Customize the Self-Service Style Sheet

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

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

 **Note:** To customize the Self-Service color theme using a point-and-click editor, see [Customizing Your Self-Service Fonts and Colors](#) on page 1041.

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

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

Customize the Self-Service Portal Login Page

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

5. Click **Save**.

SEE ALSO:

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

Customize the Self-Service Portal Home Page

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

Set the Top Solutions

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

SEE ALSO:

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

Enable the Solutions Page

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

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

1. To enable this page, click **Edit** on the Solutions Page line.
2. Select the `Show Solution Page` checkbox.
3. Check `Show Message` to display a message at the top of the Solutions Page.
4. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font.

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

5. Optionally, insert any merge fields for data that you want to replace dynamically.
6. Click **Save**.
7. To see how your Solutions Page will look, click **Preview** on the Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

SEE ALSO:

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal
- AND
- Customize Application

Customize the Self-Service Portal Log a Case Page

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

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

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

1. From Setup, enter *Self-Service Portal* in the *Quick Find* box, then select **Settings**.
2. In the Portal Pages list, click **Edit** next to Log a Case Page.
3. Select the *Show Log a Case Page* checkbox.
4. Select *Show Message* to display a message on this page.
5. If you enabled a page message, enter it in the text box, using the formatting toolbar to change the size, color, or font.
Select *Show HTML* to view and edit your page message in HTML. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
6. Optionally, insert merge fields for data that you want to replace dynamically.
7. Click **Save**.
8. To change the fields that display on the page, click the **Page Layout** link.

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

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

SEE ALSO:

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal
AND
Customize Application

Customize the View Cases Page

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

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

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

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

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

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

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

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

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

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

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

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

[Customizing Your Self-Service Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal
- AND
- Customize Application

Customize the Suggested Solutions Page

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

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

To customize the Suggested Solutions Page:

1. Click **Edit** on the Suggested Solutions Page line.
2. Select `Show Suggested Solutions Page` to enable the page in the Self-Service portal.
3. Select a `Self-Closed Case Status` to show in the `Status` field for cases closed by Self-Service users. You must select at least one "Closed" value for this field.
4. Choose the maximum number of suggested solutions to display to users at one time. You can show a maximum of ten.
5. Select the `Self-Closed Case Reasons` that Self-Service users can choose from when they self-close their cases.
6. Check `Show Message` to display a message on this page.
7. If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font. Optionally, check `Show HTML` to view your page message in HTML code. You can't save any JavaScript as part of your custom code, and [can only use certain HTML elements and attributes](#).
8. Optionally, insert any merge fields for data that you want to replace dynamically..
9. Click **Save**.
10. To see how your Suggested Solutions Page will look, click **Preview** on the Suggested Solutions Page line. If you have customized the Self-Service style sheet, the preview shows your custom styles.

SEE ALSO:

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify Self-Service pages:

- Manage Self-Service Portal
- AND
- Customize Application

Create Your Custom Page Header and Footer Sections

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

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

1. From Setup, enter *Self-Service Portal* in the **Quick Find** box, then select **Settings**.
2. Click **Edit** next to the Page Header or Page Footer listed in the Portal Page Sections.
3. Check **Show Header** or **Show Footer** to display a header or footer on your portal pages.
4. Check **Show Header Separator** or **Show Footer Separator** to include a line separating the header or footer from your body pages.
5. Optionally, enter a page message, and use the format toolbar to format it.

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

6. Click **Save**.

SEE ALSO:

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

Supported HTML Elements and Attributes for Self-Service Portal Customization

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

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

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

Supported Elements

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

EDITIONS

Available in: Salesforce Classic

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

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

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

Supported Attributes

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

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

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

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

SEE ALSO:

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

Self-Service Page Attributes

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

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

SEE ALSO:

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

Generating Login HTML

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

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

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

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

SEE ALSO:

[Setting Up Your Self-Service Portal](#)

Using the Portals Tab

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

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

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

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

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

SEE ALSO:

[Displaying the Portals Tab](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To generate Self-Service portal HTML:

- Manage Self-Service Portal

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up the Self-Service portal:

- Manage Self-Service Portal

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

Managing Self-Service Users

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

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

- To enable Self-Service users individually from the Contacts tab, select a contact and click **Enable Self-Service** on the contact's detail page.
- To enable multiple Self-Service users at once, see [Enabling Multiple Self-Service Users](#) on page 1058.
- To change Self-Service user information, see [Editing Self-Service User Information](#) on page 1059.
- To reset Self-Service user passwords, see [Resetting Self-Service User Passwords](#) on page 1060.

IN THIS SECTION:

- [Enabling Multiple Self-Service Users](#)
- [Editing Self-Service User Information](#)
- [Resetting Self-Service User Passwords](#)

SEE ALSO:

- [Setting Up Your Self-Service Portal](#)

Enabling Multiple Self-Service Users

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

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

To enable new users for your Self-Service portal:

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- Edit Self-Service Users

To mass manage Self-Service users:

- Manage Self-Service Portal

AND

Edit Self-Service Users

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- Edit Self-Service Users

To mass manage Self-Service users:

- Manage Self-Service Portal

AND

Edit Self-Service Users

7. Click **Save**.

SEE ALSO:

[Managing Self-Service Users](#)

Editing Self-Service User Information



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

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

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

SEE ALSO:

[Managing Self-Service Users](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- Edit Self-Service Users

To mass manage Self-Service users:

- Manage Self-Service Portal

AND

Edit Self-Service Users

Resetting Self-Service User Passwords

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

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

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

SEE ALSO:

[Managing Self-Service Users](#)

Portal Health Check

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage Self-Service users:

- Edit Self-Service Users

To mass manage Self-Service users:

- Manage Self-Service Portal

AND

Edit Self-Service Users

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- Customize Application

AND

Manage Users

AND

Modify All Data

- Folders

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

The following reports are included:

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

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

SEE ALSO:

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

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

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

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

View the Administrative and User Permissions Report for Portal Users

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

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

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- Customize Application
AND
Manage Users
AND
Modify All Data

To view this report:

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

From the report page, you can:

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

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

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

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

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

To view this report:

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

On the object detail page, you can:

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

From both report pages, you can:

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

- Customize Application
AND
Manage Users
AND
Modify All Data

View the Sharing Organization-Wide Defaults Report for Portal Users

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

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

To view this report:

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

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

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

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

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

From the report page, you can:

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

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

To set default sharing access:

- Manage Sharing

View the Sharing Rules Report for Portal Users

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

To view this report:

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

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



Note:

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

From the report page, you can:

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



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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view portal health check reports:

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

To create and edit sharing rules:

- Manage Sharing

Using Zones to Organize Communities

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

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

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

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

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

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

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

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

IN THIS SECTION:

[Creating and Editing Zones](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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

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

USER PERMISSIONS

To create or edit a zone:

- [Customize Application](#)

Creating and Editing Zones

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

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

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

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

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

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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

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

USER PERMISSIONS

To create or edit a zone:

- **Customize Application**

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

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

- d. In `Site That Hosts Your Zone`, click  and choose the Lightning Platform site on which you want to host the zone.
 - If you associated the zone with a portal, you can enter a Lightning Platform site domain.
 - If you associated the zone with a Salesforce Community that does not require authentication for users to view zone activity, we populate the Lightning Platform site domain for you.

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

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

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

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

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

- h. Select the data categories that you want exposed to the zone from the list of pre-defined data categories.
9. To set up Ideas for the zone, use the `Experts group` field to select the public group of experts who will monitor the zone for Ideas.

10. Click **Save**.

SEE ALSO:

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

[Designating Community Experts](#)

[Salesforce Ideas Implementation Guide](#)

Encourage Idea Creation and Sharing in Salesforce Communities

Add your Ideas users to Salesforce Communities to take advantage of new ways to collaborate.

Create more engagement and collaboration around Ideas as you enable your customers to post and comment on Ideas right from their Salesforce Communities home page. Adding Ideas to Salesforce Communities lets your users reap the benefits of a vibrant, creative partnership between community members. Communities are customizable, public or private spaces for employees, customers, and partners to collaborate on best practices and business processes. When you enable Ideas in Salesforce Communities, you give your community members the ability to create ideas and idea themes and have a dialog around them. You can create public communities that let your customers or partners exchange ideas, as well as private internal communities that are specific to your employees.

Moderating and managing ideation communities can be assigned to internal community members, depending on their privileges. Internal users can moderate both internal and external communities because they have access to internal communities as well as any public communities that they have permission to access.

To organize your community into smaller groups, you can create zones within a community that reflect special interests, product groupings, or types of customers. Zones are shared by the Ideas, Answers, and Chatter Answers applications, allowing you to view and create zones from those locations. For example, if you're a computer manufacturer you can create a community named Laptop Products and another named Desktop Products. Within each of those communities, you can create zones that are specific to different aspects of the products.

Community members have visibility into different zones based on their user profiles:

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

Ready to add ideas? Then let's get started!

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To customize Ideas settings for Salesforce Communities:

- [Customize Application](#)

Managing Ideas

Ideas is a community of users who post, vote for, and comment on ideas. Consider it an online suggestion box that includes discussions and popularity rankings for any subject. To further organize your community into smaller groups, you can create zones within a community that reflect special interests, product groupings, or types of customers.

You can display Ideas to internal Salesforce users, a Salesforce.com Community, Customer Portal or partner portal users, or to public users (requires setting up a Lightning Platform site). You can also manage Ideas from the console.

Professional Edition organizations can have only one internal zone. All other editions can have up to 50 zones shared between Ideas, Answers, and Chatter Answers.

As an administrator, you can:

- Control whether ideas are enabled for your organization and customize the [half-life](#) of ideas. See [Customizing Ideas Settings](#).
- Create zones to organize ideas. See [Creating and Editing Zones](#).
- Create [Idea Themes](#) that let you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company.
- Define picklist values for the `Categories` and `Status` fields. See [Define Picklist Values for the Categories and Status Fields](#).
- Specify the layout of custom fields. See [Set Page Layouts for Ideas](#).
- Make idea reports available to your users.
- Customize idea search layouts.
- Merge ideas to reduce the number of duplicate ideas.
- Assign a status to an idea.
- Delete a vote through the API to erase all history that the vote ever occurred.

Specifically, deleting a vote does the following:

- Removes 10 points from the idea's overall score
- Removes the user's name from the Last 100 Votes section on the idea's detail page

SEE ALSO:

[Salesforce Ideas Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To manage Ideas communities:

- [Customize Application](#)

Customizing Ideas Settings

To manage organization-wide settings for Ideas:

1. From Setup, enter *Ideas Settings* in the Quick Find box, then select **Ideas Settings**.
2. Click **Edit**.
3. Use the **Enable Ideas** checkbox to enable or disable Ideas for your organization.

Disabling Ideas removes the Ideas tab and users will no longer be able to access active zones, but these zones will reappear on the Ideas tab the next time you enable Ideas.

4. Optionally, select **Enable Text-Formatting, Images and Links** to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.



Warning: Once you enable the Ideas HTML editor, you cannot disable it. If you do not see the **Enable Text-Formatting, Images and Links** checkbox, the Ideas HTML editor is enabled for your organization by default.

5. If your organization does not already have the multi-select **Categories** field enabled, click the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the **Categories** field enabled.

If the **Categories** field is already enabled, the **Enable Categories** checkbox is selected. Once the field is enabled, you cannot disable it.

6. Select **Enable Reputation** to let users earn points and ratings based on their activity in each zone.
7. Select an **Ideas User Profile** type for all user profiles in the zone.

User Profile Type	Description
Chatter profile	The user's Chatter profile is the default user profile type. If you select this option and a user doesn't have a Chatter profile, then the Ideas zone profile is used.
Ideas zone profile	The profile that the user sets up for the Ideas zone. This profile type is used for Ideas zones in portals.
Custom profile with a Visualforce page	You can specify a Visualforce page for a custom profile for all Ideas users in the zone. If you select this profile type, you must specify a Visualforce page in Custom Profile Page .

8. In the **Half-Life (in Days)** field, enter a number of days.

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.



Note: This field does not appear if Ideas is disabled. To modify the **Half-Life (in Days)** field, save your changes after enabling ideas, and then click **Edit** on the Ideas Settings page.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To customize Ideas settings:

- **Customize Application**

9. Click **Save**.

SEE ALSO:

[Enable Idea Themes](#)

[Managing Ideas](#)

[Salesforce Ideas Implementation Guide](#)

[Encouraging Innovation with Idea Reputation](#)

Encouraging Innovation with Idea Reputation

Reward the most influential and innovative members of your Ideas community by acknowledging their participation and contribution to the community. By enabling Reputation in Ideas, and then choosing level names and thresholds, you let users earn points and ratings that reward and encourage frequent, meaningful activity in the community. As community members engage more frequently, they improve the overall quality of ideas, which means that everyone reaps the benefits of a vibrant, creative partnership with your customers.

Users are awarded points for many activities including:

- Creating an idea
- Receiving a comment on their idea
- Receiving an upvote on their idea or comment
- Commenting on someone else's idea

Reputation points are calculated separately for each zone, and for the cumulative activity within the entire organization. Users who participate in different zones will have different reputation values for each zone based on their activity in that zone. When users are logged into the internal application, their reputation score is based on their participation in all zones to which they belong.

Ideas comes with the following pre-defined reputation levels that apply to all zones and to the internal application. Using the API, reputation levels and points for each level can be added or edited to reflect the levels of participation in your community.

Name	Points per Level
Observer	0 – 99
Contributor	100 – 399
Influencer	400 – 1499
Thought Leader	1500+

Reputation levels are available through the API and can be displayed in custom Ideas implementations. To add or edit reputation level names, points per level, or other attributes of a reputation in any of your zones, use the IdeaReputation and IdeaReputationLevel objects in the API. You can create up to 25 different reputation levels for each zone.

SEE ALSO:

[Customizing Ideas Settings](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Designating Community Experts

Designate your star users as experts in their communities.

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When community experts post comments or ideas, a unique icon (★👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

If you want to have experts within your community, set up [Zones](#) and create a public group that includes the expert users. Then, during the setup process you can designate this public group as your community experts.

Before you select a public group to be community experts, note the following:

- A community expert can be an employee of your organization who is responsible for providing official responses to the community. A community expert can also be someone outside your organization who is active within the community and knowledgeable about the subject matter.
- The only difference between a community expert and other community members is the unique icon that displays next to the community expert's name. Community experts do not have any extra permissions beyond what is specified in their user profile and permission sets.
- Community experts must be part of a public group and that public group must be specified in the `Experts Group` drop-down list. You might need to create a public group for each community if the experts within those communities are different.
- If a community is displayed in a Customer Portal or partner portal, you can use a cascading style sheet (CSS) to change the icon associated with the community expert. When creating a portal, specify your CSS in the `Header` of your portal and use the `expertUserBadge` class to reference the new background image for the community expert. We recommend the icon be no larger than 16 by 16 pixels.

SEE ALSO:

[Creating and Editing Zones](#)

Set Page Layouts for Ideas

When you create a custom field for Ideas, you can add it to the Additional Information section that appears on the Post Idea and Idea Detail pages.

You can specify the order in which a custom field appears in the Additional Information section as well as remove a custom field from these pages without permanently deleting the field from the system. Although it's possible to move standard fields onto the page layout, by default they already appear in the Idea Detail section at the top of the page and their order is not customizable. However, you can drag the `Status` field to the Additional Information section to have the status of an idea appear in the page layout.

 **Note:** The label and layout of the Additional Information section can't be customized.

1. From the object management settings for ideas, go to Page Layouts.
2. Click **Edit**.
3. Select a custom field from the box on the right and drag it to the Additional Information section. Custom fields appear in the order they are placed in the Additional Information section.
4. To display an idea's status to zone members, select the `Status` field and drag it to the Additional Information section.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To set the layout of a Ideas custom field:

- Customize Application

5. To let users add files to ideas, select the `Attachments` field and drag it to the Additional Information section. Make sure you've set field-level security for your users.
6. Click **Save**.

SEE ALSO:

[Define Picklist Values for the Categories and Status Fields](#)

[Find Object Management Settings](#)

Adding Apex Triggers to Idea Comments

Adding Apex triggers to Idea Comments lets you perform actions related to comments that users post to an idea.

A trigger is a set of Apex code that fires at a particular time in the life cycle of a record. You can add Apex triggers to comments in Ideas to better manage ideas in your community.

Use triggers on comments to perform actions such as:

- Send an email notification to the moderator or other user when a comment is left on an idea.
- Send an email notification to the user with the contents of their comment.
- Notify the moderator when a specified number of comments is reached for an idea.
- Prevent posting of comments with specific words.

Migrating to the Community Application

If your organization enabled Ideas prior to the Winter '10 release, we recommend that you migrate to the new Community application. The Community application:

- Replaces the Ideas application in the Lightning Platform app menu.
- Includes the Ideas and Answers tabs.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

 **Warning:** Once you migrate to the Community application, you cannot return to the old Ideas application. The Ideas tab with all your existing data will still be available in the new Community application.

To migrate to the Community application:

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

The Community message appears at the top of the Ideas Settings page. If the Community message does not appear, the Community application is already enabled for your organization.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To define Apex triggers:

- Author Apex

To manage Ideas communities:

- Customize Application

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To customize Ideas settings:

- Customize Application

- Click **Enable** below the Community message. Salesforce checks your organization for any custom objects named Community. If such an object exists, you must delete or rename the object before enabling the Community app.
- Click **Enable** when Salesforce confirms it's okay to migrate to the Community application.

Customizing Ideas Standard and Custom Fields

USER PERMISSIONS

To define picklist values:	Customize Application
To set field level security:	Customize Application
To define or change field validation rules:	Customize Application
To create Ideas custom fields:	Customize Application
To enable attachments for ideas:	Customize Application

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Administrators can customize Ideas standard and custom fields to meet the needs of an organization's unique requirements:

- Define picklist values for the Categories and Status fields.
- Click the name of a standard or custom field to set field-level security.
- Click the name of a custom field to set validation rules.
- Create a custom field for Ideas. Custom fields appear in the Additional Information section on the Post Idea and Idea Detail pages.
- Add the `Attachment` field to the layout and set field-level security. Users can attach all supported file types, including Microsoft® PowerPoint® presentations and Excel® spreadsheets, Adobe® PDF files, image files, audio files, and video files. The maximum attachment size is determined by your organization.

 **Note:** In custom implementations of Ideas, you can use the `URL.getFileFieldURL` Apex method to retrieve the download URL for file attachments.

IN THIS SECTION:

- [Select Picklist Values and Defaults for a Zone](#)
- [Define Picklist Values for the Categories and Status Fields](#)
- [Enabling the Categories Field](#)

SEE ALSO:

- [Customizing Ideas Settings](#)

Select Picklist Values and Defaults for a Zone

After you define picklist values for the `Categories` and `Status` fields, you can add and remove picklist values from these fields on a per-zone basis and specify a default value. This allows you to customize the `Categories` and `Status` fields based on the unique purpose of a zone. For information, see [Define Picklist Values for the Categories and Status Fields](#) on page 1075.

To add or remove picklist values from a specific zone:

1. From Setup, enter `Zones` in the `Quick Find` box, then select **Zones**.
2. Click the name of the zone.
3. In the `Idea Picklists Available for Editing` section, click **Edit** next to the `Categories` or `Status` field.
4. To remove a picklist value, select the value from the Selected Values list and click **Remove**.
5. To add a picklist value to the zone, select the value from the Available Values list and click **Add**.
6. To specify a default value for the field, use the Default drop-down list.
7. Click **Save**.

SEE ALSO:

[Creating and Editing Zones](#)

Define Picklist Values for the Categories and Status Fields

Overview

For members of a zone to assign categories to an idea or be able to view an idea's status, the Ideas administrator needs to define picklist values for the `Categories` and `Status` fields. These fields are only available in an ideas community and not in an answers community.

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas.

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

 **Note:** If the `Category` field is displayed (instead of `Categories`), then your zone members can only assign a single category to an idea. To allow them to assign multiple categories to an idea, from Setup, enter `Ideas Settings` in the `Quick Find` box, then select **Ideas Settings** and enable `Categories`.

Defining Picklist Values

To define picklist values for the `Categories` and `Status` standard fields:

1. From Setup, enter `Ideas` in the `Quick Find` box, then select **Fields** From the management settings for ideas, go to Fields.
2. Click **Edit** next to the `Categories` or `Status` standard field.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or remove picklist values from a zone:

- Customize Application

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To define picklist values:

- Customize Application

3. On the picklist edit page, click **New** to add new picklist values to the standard field. You can also edit, delete, reorder, and replace picklist values.
 -  **Note:** Once you add picklist values to the `Categories` or `Status` field, the field will always require at least one picklist value. This means you can delete picklist values until there is one remaining for the field.
4. Add one or more picklist values (one per line) in the provided text area.
5. Select the zones that you want to include the new picklist values.
6. Save your changes.
7. To specify a default value for the `Categories` or `Status` fields, see [Select Picklist Values and Defaults for a Zone](#).
 -  **Note:** Do not use the **Edit** link on the Fields page to specify a default value for `Categories` or `Status`. You can only specify a default value from the Zone Detail page.
8. To display an idea's status to zone members, select the `Status` field and drag it to the Additional Information section. You can find this field from Setup by entering `Ideas` in the `Quick Find` box, then selecting **Fields**.
Once you select this checkbox, you can assign a status to any idea when you post a new idea or edit an existing idea.

SEE ALSO:

[Managing Ideas](#)[Select Picklist Values and Defaults for a Zone](#)[Find Object Management Settings](#)

Enabling the Categories Field

Organizations using the `Category` field can switch to the multi-select `Categories` field that allows zone members to associate more than one category with an idea. The `Category` field only allows one category to be associated with an idea.

 **Warning:** Once you enable the `Categories` field, you cannot disable it. Also, enabling the `Categories` field automatically disables the old `Category` field in Salesforce and the API.

When you enable the `Categories` field, Salesforce automatically does the following:

- Checks your organization's workflow rules, triggers, validation rules, custom fields, and Apex code and lists any area that references the `Category` field. You must manually fix or remove these references before Salesforce allows you to enable the `Categories` field.
- Automatically moves all picklist values and search layouts from the old `Category` field to the new `Categories` field.
- Ensures each idea is associated with the appropriate picklist value in the new `Categories` field.
- Makes the new `Categories` field available in Salesforce and the API.

To enable the `Categories` field:

1. From Setup, enter `Ideas Settings` in the `Quick Find` box, then select **Ideas Settings**.
2. Click **Enable** located below the `Categories` message at the top of the page. This button is not displayed if your organization already has the `Categories` field enabled.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To customize Ideas settings:

- [Customize Application](#)

Salesforce checks your organization's workflow rules, triggers, validation rules, custom fields, and Apex code for references to the `Category` field and lists any areas where this reference needs to be removed.

3. If you need to remove references to the `Category` field, click **Cancel**. Once you have removed the references, try enabling the `Categories` field again.



Note: For validation and workflow rules you must delete the rule or fix the `Category` reference within the rule. It is not sufficient to deactivate the rule. If you need to delete a custom field that references the `Category` field, make sure to erase the field after it has been deleted.

4. Read the information in the pop-up window, and click **Enable**. It may take several minutes for Salesforce to enable the new field.
5. Fix any custom reports that reference the old `Category` field.

SEE ALSO:

[Customizing Ideas Settings](#)

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

[Define Picklist Values for the Categories and Status Fields](#)

Enable Idea Themes

1. From Setup, enter *Idea Themes Settings* in the Quick Find box, then select **Idea Themes Settings**.
2. Click **Edit**.
3. Select **Enable Idea Themes**.
4. Click **Save**.

SEE ALSO:

[Customizing Ideas Settings](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To customize Idea Themes settings:

- [Customize Application](#)

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. In Lightning Experience, click *Your Name*, and then click *Your Name* again in the dialog. 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.

EDITIONS

Available in: Salesforce Classic

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

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

The screenshot shows a user profile for 'An Lin' in the 'Overview' tab. The profile includes a photo, a 'Moderator' badge, and contact information. A red box highlights the 'Community Activity' section, which displays the following statistics:

Community Activity	
Questions	
Questions Asked	1
Questions Answered	4
Solved Questions	0
Ideas	
Ideas Created	2
Idea Comments Received	1
Ideas Voted On	0

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

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

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

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

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

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

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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

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 subtab allows you to see the most popular ideas in the history of your Ideas zone.

Vote, Idea

In an ideas community, a vote means that 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](#)

[Salesforce Ideas Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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](#)

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 Lightning Platform 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.

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

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

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 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 ([not available in all orgs](#))

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 (not available in all orgs)

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](#)

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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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 Salesforce 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 ([not available in all orgs](#))

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 ([not available in all orgs](#))

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To merge multiple ideas:

- Edit on ideas

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

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
To create communities:	Customize Application

EDITIONS

Available in: Salesforce Classic

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

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 1092. 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>		<samp>
<acronym>		<small>
<address>	<h1>	
	<h2>	<strike>
<bdo>	<h3>	
<big>	<h4>	<sub>
<blockquote>	<h5>	<sup>
 	<h6>	<table>
<caption>	<hr>	<tbody>
<cite>	<i>	<td>
<code>		<tfoot>

<code><col></code>	<code><ins></code>	<code><th></code>
<code><colgroup></code>	<code><kbd></code>	<code><thead></code>
<code><dd></code>	<code></code>	<code><tr></code>
<code></code>	<code></code>	<code><tt></code>
<code><dfn></code>	<code><p></code>	<code></code>
<code><div></code>	<code><pre></code>	<code><var></code>
<code><dl></code>		

The above tags can include the following attributes:

<code>alt</code>	<code>face</code>	<code>size</code>
<code>background</code>	<code>height</code>	<code>src</code>
<code>border</code>	<code>href</code>	<code>style</code>
<code>class</code>	<code>name</code>	<code>target</code>
<code>colspan</code>	<code>rowspan</code>	<code>width</code>

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](#) on page 1070.

 **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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

The screenshot shows the 'Idea Theme Detail' page for the theme 'What colors should Spider Laptops use?'. The page includes a title, description, and a list of submitted ideas. A laptop image is displayed in the center of the page.

Action	Title	Posted By	Vote Score	Comments
Edit Del	ESD colors colors	ESD@MIA	20	1
Edit Del	Metallic colors, bronze, gold, silver	albrecht@M	10	0
Edit Del	Pastels are too boring	schmitt	20	2

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 ([not available in all orgs](#))

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](#)

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 ([not available in all orgs](#))

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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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](#)

Set Up Answers in Communities

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

To set up answers:

1. [Enable answers and set the default zone](#).
2. [Create a category group](#) for answers and [add data categories](#) to the category group.

 **Note:** Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions.
3. [Assign the data categories to your answers community](#).
4. [Review the category group visibility settings](#) to decide how you want to restrict access to categories and categorized questions in the answers community.
5. Using roles, permission sets, or profiles:
 - a. [Customize data category group visibility](#).
 - b. (Optional) [Designate default category group visibility](#) for users without visibility through roles, permission sets, or profiles.
6. (Optional) To allow community members who work with cases to [escalate an unanswered or problematic question to a new case](#):
 - a. From the object management settings for cases, go to Page Layouts. Then edit the case page layouts to include the `Question` field.
 - b. From the object management settings for cases, go to Fields. Then ensure that field-level security for the `Question` field makes the field visible in the necessary profiles.

Only community members who have permission to create cases will see an **Escalate to Case** option on questions.
7. (Optional) If your organization uses Salesforce Knowledge, users can convert particularly helpful replies into articles in the knowledge base. From Setup, enter *Knowledge Settings* in the `Quick Find` box, then select **Knowledge Settings** and ensure that `Allow users to create an article from a reply` is checked.
8. (Optional) Create validation rules for questions and replies to prevent offensive language from being posted to the answers community. To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.
9. (Optional) Create workflow rules for questions. For example, you may want to create a workflow rule that sends the community administrator an email whenever a question has ten or more replies but no best answer. Questions do not support approval processes or workflow tasks.
10. (Optional) Create reports for your answers community.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To customize answers settings:

- [Customize Application](#)

 **Tip:** Any custom fields you create for questions or replies can't display in the Salesforce user interface. However, you can add custom fields to questions or replies for API integration purposes. For example, add a custom text field to questions and use the API to populate that text field with the name of the country from which each question is posted.

SEE ALSO:

[Creating and Editing Zones](#)

[Salesforce Answers Implementation Guide](#)

[Set Up Answers in Communities](#)

Enabling Answers and Assigning the Default Zone

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

To enable the answers feature:

1. From Setup, enter *Answers Settings* in the **Quick Find** box, then select **Answers Settings**.
2. Click **Edit**.
3. Use the **Enable Answers** checkbox to enable answers.

Enabling answers adds the Answers tab to the Community application and creates a zone named Internal Zone.

4. Select the default zone for the Answers tab. You can only display one answers zone at a time. You can either use Internal Zone as the default or [create a new zone](#) and use it as the default.
5. Click **Save**.

SEE ALSO:

[Creating and Editing Zones](#)

[Salesforce Answers Implementation Guide](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To customize answers settings:

- [Customize Application](#)

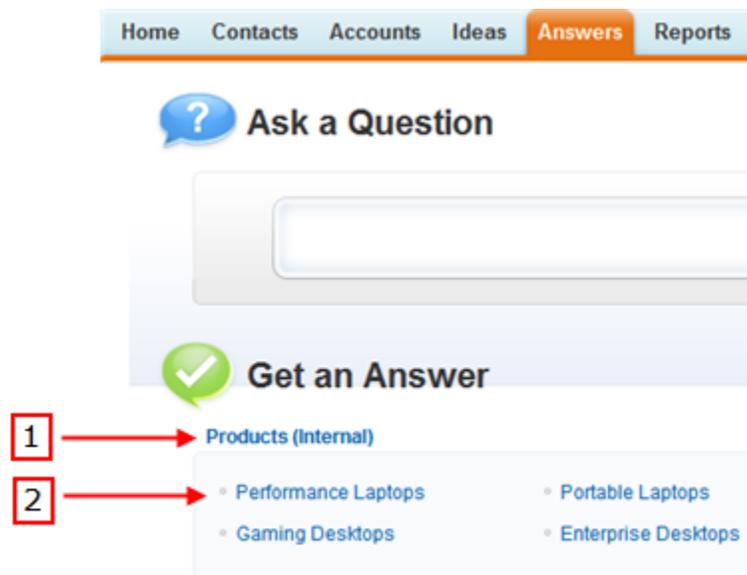
Assigning Data Categories to Answers

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

In an answers zone, a *category group* provides one or more categories that help organize questions for easy browsing. If the category group contains a hierarchy, only the first-level categories display on the Answers tab. For example, if you're a computer manufacturer you might create a Products category group for your Products zone that has four categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. Zone members can choose one of the categories to assign to a question.

The following example shows how the categories within a category group appear on the Answers tab.

Answers tab displaying categories



1. The zone assigned to answers.
2. When you assign a category group to answers, the data categories within the group appear beneath the zone name on the Answers tab. Zone members can assign these categories to their questions and browse within categories to see related questions. The name of the category group isn't displayed within the answers community.

The name of the category group is not displayed in the answers community; however, all the categories within the group appear below the zone name on the Answers tab.

To assign a category group to answers:

1. [Create a category group](#) for answers and [add data categories](#) to the category group.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To customize answers settings:

- [Customize Application](#)

We recommend naming the category group the same as the answers community so other administrators understand where the category group is being used.

 **Note:** Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions.

2. From Setup, enter *Data Category Assignments* in the **Quick Find** box, then select **Data Category Assignments** under Answers. The category group assignments page only displays after you [enable answers](#).

3. Click **Edit**.

4. Select the category group you want to assign to your answers zone.

 **Note:** If you change the category group for answers later, all the existing categories associated with your questions are removed. The questions in your answers community become uncategorized until community members assign the new categories to them.

5. Click **Save**.

You receive an email after the save process completes..

SEE ALSO:

[Data Categories in Salesforce.com](#)

Answers Overview

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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 that 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 .
	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:

[Chatter Answers Allocations](#)

Allocations for questions and Customer Portal customizations.

[Using Answers](#)

Chatter Answers Allocations

Allocations for questions and Customer Portal customizations.

Chatter Answers integrates Cases, Answers, Salesforce Sites, Customer Portal, and Salesforce Knowledge into a web community.

The following allocations apply to Chatter Answers.

- A question in Chatter Answers can receive up to 500 replies.
- When customizing Customer Portal, Answers supports all tab styles and only the following page styles:
 - Page Background
 - Text
 - Link
 - Link Hover

Using Answers

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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](#)

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:

- [Ask a Question](#)
- [Creating Questions from the Questions Tab](#)
- [Editing and Deleting a Question](#)
- [Find and View Questions](#)
- [Browsing Questions within a Zone or Category](#)
- [Replying to a Question](#)
- [Edit and Delete a Reply](#)
- [Voting for a Reply](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

[Choose the Best Answer to a Question](#)

[Viewing Your Questions and Replies](#)

[Create an Article from a Reply](#)

[Escalate a Question to a Case](#)

SEE ALSO:

[Answers Overview](#)

Ask a Question

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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**.

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.

SEE ALSO:

[Answers Overview](#)

[Using Answers](#)

[Replying to a Question](#)

[Escalate a Question to a Case](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Creating Questions from the Questions Tab

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.
-  **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**.

Editing and Deleting a Question

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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.

Find and View Questions

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.

- 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](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Browsing Questions within a Zone or Category

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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:

- 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:

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

- 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

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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](#)

[Choose the Best Answer to a Question](#)

[Escalate a Question to a Case](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Edit and Delete a Reply

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.

Voting for a Reply

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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 ([not available in all orgs](#))

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

USER PERMISSIONS

To edit replies:

- Edit on questions

To delete replies:

- Delete on questions

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Choose the Best Answer to a Question

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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:

[Create an Article from a Reply](#)

[Replying to a Question](#)

[Voting for a Reply](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Viewing Your Questions and Replies

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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](#)
- [Ask a Question](#)
- [Replying to a Question](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Create an Article from a Reply

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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](#)

[Salesforce Knowledge](#)

[Publish Articles and Translations](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

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

Salesforce Knowledge is available for an additional cost in: **Essentials, Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To view the Answers tab:

- Read on questions

To ask and reply to questions:

- Create on questions

To promote a reply:

- Create and Read on the article type used to promote replies

AND

Edit on questions

AND

Knowledge User checked on user detail page

Escalate a Question to a Case

 **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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:

[Ask a Question](#)
[Create Cases](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Setting Up Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

 **Note:** The steps below are general guidelines for setting up Chatter Answers. Chatter Answers integrates several Salesforce features, including features administrators may have implemented already, so each Chatter Answers implementation may be different. Contact Salesforce for specifics on your implementation.

Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).

1. [Enable Chatter Answers](#).
2. [Configure email notification settings](#).
3. Implement a Customer Portal (if one doesn't already exist for your organization).
4. [Configure your organization's Customer Portal for Chatter Answers](#).
5. [Configure high-volume portal users for self-registration](#).
6. [Implement a Lightning Platform site](#) (if one doesn't already exist for your organization and you want to use a site).
7. [Configure your organization's Lightning Platform site for Chatter Answers](#).
8. [Configure cases for Chatter Answers](#).
9. [Set Questions tab visibility](#).
10. Optionally:
 - [Assign data categories to Chatter Answers](#).
 - [Configure Salesforce Knowledge for Chatter Answers](#).
 - [Add Chatter Answers to your Customer Portals or Partner Portals](#).
11. [Configure one or more zones](#).
12. [Troubleshoot any setup issues](#).

 **Important:** After you set up Chatter Answers, it may not work properly if you change any of the configurations in the features mentioned above. If certain configuration issues are detected, Salesforce sends email notifications to the [Site Contact user](#).

 **Tip:**

- You can [add custom fields](#) to questions or replies for API integration purposes only. For example, add a custom text field to questions and use the API to populate that text field with the name of the country from which each question is posted. Any custom fields you create for questions or replies can't display in the Salesforce user interface.
- You can customize fields, page layouts, buttons and links, Apex triggers, and validation rules for questions and replies for Chatter Answers from Setup by entering "Chatter Answers" in the [Quick Find](#) box, then selecting **Chatter Answers** and choosing the appropriate setting.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To set up Chatter Answers:

- [Customize Application](#)
AND
[Manage Users](#)
AND
[Edit Self-Service Users](#)

- You can rename `Customer Support` on your zones' user interface. For example, you can change "Customer Support" to "Acme Support." Just edit the Customer Support label on the Question object.
- You can rename the Chatter Answers tab in your portal, as well.

Chatter Answers Implementation Overview

- 📌 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.
- 📌 **Note:** We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).

Unlike other Salesforce features, Chatter Answers spans across several areas of setup. There isn't one location in Salesforce where you can update and configure all the settings related to Chatter Answers. For example, configuring Chatter Answers might require you to update Customer Portal settings from Setup by entering `Customer Portal Settings` in the `Quick Find` box, then selecting **Customer Portal Settings**, and Lightning Platform Site settings by entering `Sites` in the `Quick Find` box, then selecting **Sites**.

Setting up Chatter Answers also includes customizing or maintaining:

- [Cases](#)
- [Case assignment rules](#)
- Workflow rules on cases or questions
- Apex triggers on questions
- Visualforce pages
- Organization-wide sharing defaults
- Feature licenses

Customizing the appearance of your Chatter Answers zone to match your company's branding involves creating or updating Visualforce pages and adding them to the Lightning Platform Site used to host your zone.

IN THIS SECTION:

- [Enable Chatter Answers](#)
- [Configuring Email Notifications for Chatter Answers Users](#)
- [Configuring a Customer Portal for Chatter Answers](#)
- [Configuring Portal Users for Self-Registration to Chatter Answers](#)
- [Configuring a Lightning Platform Site for Chatter Answers](#)
- [Configuring Cases for Chatter Answers](#)
- [Setting Q&A Tab Visibility](#)

EDITIONS

Available in: **Salesforce Classic**

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

- [Assigning Data Categories to Chatter Answers](#)
- [Configure Salesforce Knowledge for Chatter Answers](#)
- [Adding Chatter Answers to a Portal](#)
- [Troubleshooting Chatter Answers Setup](#)

SEE ALSO:

- [Setting Up Chatter Answers](#)

Enable Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Enable Chatter Answers to set up Chatter Answers zones.

1. From Setup, enter *Chatter Answers Settings* in the `Quick Find` box, then select **Chatter Answers Settings**.
2. Click **Edit**.
3. Select **Enable Chatter Answers**.
4. Optionally, select:

Option	Description
Show Chatter Answers in Portals	Lets you add Chatter Answers as a tab to your Customer Portal or Partner Portal. If you choose this option, you must add the Chatter Answers tab to each portal and assign the Chatter Answers User license to portal users. If you only want to display Chatter Answers in your portals, then you don't need to set up a Lightning Platform site to host Chatter Answers. However, a site lets guest users access some Chatter Answers data without a login, whereas portals do not.
Optimize Question Flow	Lets users filter search results by articles or questions before they post a question to any of your Chatter Answers zones. Also, adds <code>Title</code> and <code>Body</code> fields to questions for easier text input and scanning. This setting is turned on automatically when you enable Chatter Answers.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To enable Chatter Answers:

- [Customize Application](#)

Option	Description
Enable Rich Text Editor	<p>Lets zone members use the rich text editor to format text and upload images when posting questions and replies. This setting is turned on automatically when you enable Chatter Answers.</p> <p> Note: Optimize Question Flow must be enabled to select this option.</p>
Show Search/Ask Publisher Inline	<p>Embeds the Search/Ask Publisher inline instead of using a pop-up window.</p> <p> Note: Optimize Question Flow must be enabled to select this option.</p>
Enable Reputation	<p>Lets users earn points and ratings that display as hover text on their profile pictures. Reputation is enabled across all zones. This setting is turned on automatically when you enable Chatter Answers.</p>
Allow Posting Answers via Email	<p>Lets users post answers by replying to email notifications.</p>
Enable Facebook Single Sign On	<p>Lets users sign in to your Chatter Answers zones with their Facebook logins. If you choose this setting, your zones display an option to Sign in with Facebook next to your zones' Sign In. When a user signs in to Chatter Answers with a Facebook login, the first name, last name, and the photo associated with the Facebook account is used in posts to your zones.</p> <p>When you enable this feature, you must define and enable a Facebook authentication provider in your organization's security controls.</p>
Facebook Authentication Provider	<p>Lets you choose an existing Facebook authentication provider after you select Enable Facebook Single Sign On. You must choose a Facebook authentication provider to implement Facebook Single Sign On for your Chatter Answers zones. This setting is ignored if you have associated the Chatter Answers zone to a Chatter community with a different Facebook authentication provider.</p>
Custom Profile Page	<p>Lets you select a custom Visualforce page for users' profiles for Chatter Answers on a public Chatter community site. You must have Visible without authentication set for the zone in order for the user profile pages to be used. The following attributes are passed to the custom Visualforce page that you select:</p> <ul style="list-style-type: none"> • <code>communityId</code>. This attribute indicates which zone the currently selected feed item, such as a question or a reply, belongs to. • <code>userId</code>. This attribute indicates the owner of the currently selected feed item, such as a question or a reply.

Option	Description
	<ul style="list-style-type: none"> • <code>showHeader</code>. This attribute is a Boolean value that specifies whether the Salesforce tab header is included in the page. If this attribute is set to true, the Salesforce tab header is displayed.

5. Click **Save**.

After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:

- A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
- Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
- Visualforce pages that you can add to a Lightning Platform site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.
- An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
- An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
- A workflow field update named `chatter_answers_num_subscriptions_above` so that when a question is escalated to a case, `Priority` on questions is updated.
- Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.

IN THIS SECTION:

[Visualforce Pages for Chatter Answers](#)

[Customizing Chatter Answers using Visualforce Pages](#)

You can create a Visualforce page that displays a Chatter Answers zone customized for your users.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

Visualforce Pages for Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

After you enable Chatter Answers, the Visualforce pages below are automatically added to your organization. You can use these pages to set up and configure Chatter Answers.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Visualforce page	Description
ChatterAnswersAgentView	The Visualforce component that displays questions on case detail pages when questions are converted to cases. This component is optional and offers an alternative to the case detail page.
ChatterAnswersChangePassword	The page where users can change their passwords to your zone.
ChatterAnswersForgotPassword	The forgot password page for your zone.
ChatterAnswersForgotPasswordConfirm	The forgot password confirmation page for your zone.
ChatterAnswersHelp	The online help page displayed to users when they click Need Help?
ChatterAnswersLogin	The login page for your zone.
ChatterAnswersRegistration	The page where users can self-register for access to your zone.
When you create a zone, the following page is added to your organization: <i>Community Name_main</i> (Home Page)	<p>The page that includes the question, reply, and Salesforce Knowledge article feeds for your zone. This page is also used to determine the community from which email notifications are sent to users.</p> <p>This page is automatically generated when you save a new zone without choosing <i>Visualforce Page That Hosts Your Community's Feeds</i>. The generated page includes your zone's ID so that topics, questions, and replies are associated with your specific zone and can display on it. The page is named after your zone with a suffix of "_main," for example, <i>ZoneName_main</i>. The page also includes a language attribute that matches your organization's default language.</p>

SEE ALSO:

[Enable Chatter Answers](#)

[Setting Up Chatter Answers](#)

[Visualforce](#)

[Customizing Chatter Answers using Visualforce Pages](#)

Customizing Chatter Answers using Visualforce Pages

You can create a Visualforce page that displays a Chatter Answers zone customized for your users.

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

By using a Visualforce page, you can add custom widgets to Chatter Answers, such as announcements or ads, which let you extend your branding and change the experience for users. You can also control the arrangement of elements on the page. Your customers can access your custom Chatter Answers zone through a Lightning Platform site, a tab in a Community, or a Customer Portal to which you've added the Visualforce page. When internal users access a Chatter Answers zone that uses a Visualforce page, they see only the zone that is related to the page; they can't switch zones as they can when using the standard Q&A tab.

 **Note:** You can't customize the Chatter Answers Q&A tab with a Visualforce page, but you can add a Visualforce tab in your organization and create an internal Chatter Answers experience with your custom Visualforce page.

In order to display the zone, the Visualforce page you create must include either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:datacategoryfilter`.

Example: Custom Visualforce Page using the `chatteranswers:allfeeds` Component

The `chatteranswers:allfeeds` component provides an out-of-the-box Chatter Answers Visualforce page. A page that uses the `chatteranswers:allfeeds` component includes the following Chatter Answers elements:

- Chatter Answers sign in
- Chatter Answers profile
- Data category filters
- The Search/Ask bar
- Feed filters
- The questions feed

For example, the following Visualforce page including the `chatteranswers:allfeeds` component has all of the Chatter Answers elements in the standard arrangement for a zone without any other custom widgets.

```
<apex:page>
  <body>
    <chatteranswers:allfeeds communityId="09aD00000000K7c"/>
  </body>
</apex:page>
```

Example: Custom Visualforce Page using All of the Chatter Answers Page Components

Using the Chatter Answers page components allows you to pick and choose which elements of your Chatter Answers zone appear to your customers. You can use as few as one component or you can customize your page to use all of them. You can include the following components:

- `chatteranswers:aboutme`
- `chatteranswers:guestsignin`
- `chatteranswers:feedfilter`
- `chatteranswers:feeds`
- `chatteranswers:searchask`
- `chatteranswers:datacategoryfilter`

Using the Chatter Answers page components instead of the `chatteranswers:allfeeds` component allows you more flexibility over the arrangement of the elements on the page. For example, the following Visualforce page includes all of the standard Chatter Answers elements, but they appear in a different order on the resulting page than they do when you use the

`chatteranswers:allfeeds` component. In this example, the Search/Ask component and the feed filter appear below the feed instead of above it.

```
<apex:page language="en_US" showHeader="false" cache="true">
  <body>
    <div class="csMini">
      <div class="threecolumn">
        <div class="leftContent">
          <chatteranswers:guestsignin />
          <chatteranswers:aboutme communityId="09aD00000000cfE"/>
          <chatteranswers:datacategoryfilter communityId="09aD00000000cfE"/>
        </div>
        <div class="mainContent">
          <div class="lowerMainContent" id="lowerMainContent">
            <div id="rightContent" class="rightContent"></div>
            <div id="centerContent" class="centerContent">
              <chatteranswers:feeds communityId="09aD00000000cfE"/>
              <chatteranswers:searchask communityId="09aD00000000cfE"/>
              <chatteranswers:feedfilter />
            </div>
          </div>
        </div>
        <div class="clearingBox"></div>
      </div>
    </div>
  </body>
</apex:page>
```

SEE ALSO:

[Adding a Custom Visualforce Page to Display Chatter Answers](#)

[Visualforce Pages for Chatter Answers](#)

Configuring Email Notifications for Chatter Answers Users

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Determine when emails are sent to users by configuring the notification settings that apply to all of your zones. Each email includes a link to a specific zone so that users can easily return to it.

1. From Setup, enter *Email Notification Settings* in the Quick Find box, then select **Email Notification Settings**.
2. Click **Edit**.
3. Choose from the following settings:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To configure email notifications for your Chatter Answers users:

- Customize Application

Option	Description
Replies to a question they own	Notify customers when other users reply to their questions.
Replies to a question they follow	Notify customers when other users reply to questions they're following.
Selects a best answer on a question they follow	Notify customers when a best answer is selected for a question they're following.
Sends a private reply to their question (Customer Support)	Notify customers when customer support responds to their questions privately.

4. Click **Save**.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

Configuring a Customer Portal for Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

 **Note:** Even if you don't plan on using a Customer Portal, you must configure one for Chatter Answers to authenticate users who sign in to your Chatter Answers zone.

1. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
2. Click **Edit** next to the Customer Portal you want to configure for Chatter Answers.
3. Click **Login Enabled** to let customers sign in to Chatter Answers.
4. In **From Email Address**, type the address from which all email communications from your Chatter Answers zone are sent. For example, support@acme.com.
5. In **From Email Address Name**, type the name associated with the **From Email Address**. For example, Acme Customer Support.
6. Click **Self-Registration Enabled** to let customers register themselves for access to Chatter Answers.
7. In **Default New User License**, choose the portal user license that's automatically assigned to customers who self-register. We recommend you choose the High Volume Customer Portal license.
8. In **Default New User Profile**, choose the profile that's automatically assigned to customers who self-register. We recommend you [choose the profile you cloned and customized for self-registration](#).
9. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- [Customize Application](#)

10. Assign the profile you selected as the `Default New User Profile` to your Customer Portal so that users can sign in to your zone:
 - a. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.
 - b. Select your portal's name.
 - c. In the Assigned Profiles section, click **Edit Profiles**.
 - d. Click `Active` next to the profile you selected as the `Default New User Profile`.
 - e. Click **Save**.

SEE ALSO:

- [Chatter Answers Implementation Overview](#)
- [Setting Up Chatter Answers](#)
- [Enable Customer Portal Login and Settings](#)

Configuring Portal Users for Self-Registration to Chatter Answers

-  **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Configure Customer Portal users for self-registration to your Chatter Answers community.

1. Clone the High Volume Customer Portal profile so that you can customize it:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click **Clone** next to High Volume Customer Portal.
 - c. Type a name for the new profile.
 - d. Click **Save**.
2. Customize the cloned profile to include permissions to the standard objects on your community:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click the name of the cloned profile.
 - c. Click **Edit**.
 - d. In Standard Object Permissions, click on the following permissions to these objects:

Object	Permissions
Cases	Read, Create
Contacts	Read
Questions	Read, Create
Account	Read

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- Customize Application

To manage Customer Portal users:

- Edit Self-Service Users

- e. Click **Save**.

SEE ALSO:

- [Setting Up Chatter Answers](#)
- [Configuring a Customer Portal for Chatter Answers](#)
- [Chatter Answers Users Overview](#)

Configuring a Lightning Platform Site for Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

 **Note:** Configuring a Salesforce site is recommended for self-service communities.

Configure a Lightning Platform site for Chatter Answers to host a domain and publicly display some of your Salesforce data, such as questions, replies, and Salesforce Knowledge articles.

1. From Setup, enter *Sites* in the **Quick Find** box, then select **Sites**.
2. Click **Edit** next to the name of the site you want to configure for Chatter Answers.
3. Click **Active** to activate the site.
You can activate the site after you've finished [setting up Chatter Answers](#).
4. In **Active Site Home Page**, choose a Visualforce page as the home page for your site.
5. Click **Save**.
6. Click **Edit** on the Site Visualforce Pages related list.
 - a. Use the **Add** and **Remove** buttons to enable the following Visualforce pages for your site:
 - ChatterAnswersAgentView
 - ChatterAnswersChangePassword
 - ChatterAnswersForgotPassword
 - ChatterAnswersForgotPasswordConfirm
 - ChatterAnswersHelp
 - ChatterAnswersLogin
 - ChatterAnswersRegistration
 - b. Click **Save**.
7. Click **Public Access Settings** to grant guest users (unauthenticated, non-Customer Portal users) access to cases, questions, and Salesforce Knowledge articles.
 - a. Click **Edit** on the profile for Chatter Answers users.
 - b. In Standard Object Permissions, click **Read** on Cases and Questions.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To create and edit Salesforce Sites:

- Customize Application

- c. Optionally, if you want articles to display in Chatter Answers, click **Read** on articles types in Article Type Permissions.
 - d. Click **Save**.
8. Click **Edit** next to a category group in the Category Group Visibility Settings related list to grant users access to the categories so that they can browse questions, replies, and Salesforce Knowledge articles.
 - a. Next to `Visibility`, click `All Categories`.
 - b. Click **Save**.
9. Return to the site and select its name from Setup by entering `Sites` in the `Quick Find` box, then selecting **Sites**.
10. Click **Login Settings** to enable user authentication for the site.
 - a. Click **Edit**.
 - b. In `Enable Login For`, choose the Customer Portal you created for Chatter Answers.
 - c. Click **Save**.

After you configure your Lightning Platform site for Chatter Answers, you can replace the default Visualforce pages that make up your community with customized ones. The Visualforce pages are automatically set to your site's URL so that portal users can navigate to them.

 **Note:** To make your site's page URLs short and easy to remember, you can use the Chatter Answers URL rewriter. The following pages use the URL rewriter:

- `ChatterAnswersHelp`
- `ChatterAnswersLogin`
- `ChatterAnswersRegistration`
- `ChatterAnswersForgotPassword`

Chatter Answers is also compatible with custom URL rewriters for sites.

1. From Setup, enter `Sites Settings` in the `Quick Find` box, then select **Sites Settings**.
2. Click **Edit** next to a site.
3. Choose the pages to replace. If you replace the `Change Password Page`, the `Change Password Page` for your site is automatically updated too.
4. Click **Save**.

 **Note:** Internet Explorer 8 users receive a security warning if you customize with URLs that don't include `https://`.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

[Visualforce Pages for Chatter Answers](#)

Configuring Cases for Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Configure case features for Chatter Answers so that cases are created, escalated, and accessed by the appropriate users of your Chatter Answers zones.

1. Set your organization-wide sharing defaults to `Private on Account, Controlled by Parent on Contact,` and `Private on Case` to prevent users from accessing each others' information.
2. Set field-level security on `Question` on cases to `Visible` for profiles assigned to your Customer Portal so that users can access their private questions.
3. Update `Origin` on cases with the value in the Question trigger so that support agents can see which cases originated from Chatter Answers.
4. Create a case assignment rule where Case Origin equals the value of Chatter Answers so that cases created from private questions are assigned to support agents.
5. Grant high-volume portal users access to cases so that they can access their private questions on Chatter Answers.

SEE ALSO:

[Setting Up Chatter Answers](#)

Setting Q&A Tab Visibility

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Set the visibility of the Q&A tab to `Default On` so that support agents can view, search, filter, and moderate questions posted to your Chatter Answers zones.

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
2. Select a support agent profile.
3. Depending on which user interface you're using, do one of the following:
 - Enhanced profile user interface—In the **Find Settings...** box, enter the name of the tab you want and select it from the list, then click **Edit**.
 - Original profile user interface—Click **Edit**, then scroll to the Tab Settings section.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

USER PERMISSIONS

To set organization-wide sharing defaults:

- Manage Sharing

To set field-level security:

- Manage Profiles and Permission Sets

AND

Customize Application

To customize fields:

To create assignment rules:

To grant high-volume portal users access to cases:

- Customize Application

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

USER PERMISSIONS

To set Q&A tab visibility:

- Manage Profiles and Permission Sets

4. Specify the visibility of the Q&A tab to `Default On`.
5. (Original profile user interface only) To reset users' tab customizations to the tab visibility settings that you specify, select **Overwrite users' personal tab customizations**.
6. Click **Save**.

SEE ALSO:

[Setting Up Chatter Answers](#)

Assigning Data Categories to Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Assign a data category group to Chatter Answers so that it's available to all of your Chatter Answers zones. You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. From Setup, enter *Data Category Assignments* in the `Quick Find` box, then select **Data Category Assignments** under Chatter Answers.
2. Click **Edit**.
3. Select a category group.
4. Click **Save**.

 **Note:** Each zone in Chatter Answers can be associated with a top-level category. For a zone to be visible to a customer, the customer's user profile must have visibility to that zone's top-level data category. In addition, if a customer has visibility to child data categories but not to the top-level data category associated with a zone, the zone won't be visible to them.

SEE ALSO:

[Setting Up Chatter Answers](#)

[Data Categories in Salesforce.com](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To assign data categories to Chatter Answers:

- [Customize Application](#)

Configure Salesforce Knowledge for Chatter Answers

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

To display Salesforce Knowledge articles in your Chatter Answers zones, you must:

1. [Implement Data Categories](#) (if you haven't done so already).
2. [Implement Salesforce Knowledge](#) (if you haven't done so already).
3. Configure both for Chatter Answers.

You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. If you use role-based data category visibility, [set the Default Data Category Visibility to All Categories](#) so that customers not included in your organization's role hierarchy, such as high-volume portal users, can access categories that include questions and Salesforce Knowledge articles.

Alternatively, use permission sets or profiles to [set data category visibility](#).

2. [Create one category group for all of your communities](#) so that you're less likely to reach the limit of three active data categories. Then add a child category for each community; and add child categories to those categories to provide topics.
3. [Activate the category group you want available to Chatter Answers](#) so that users can access it.
4. [Grant "Read" permissions to specific article types](#) on the profiles of Chatter Answers users so that they can access articles from your zones.
5. [Optionally, allow support agents to promote replies to draft articles in the knowledge base](#) so that your support team can capture useful information quickly.

SEE ALSO:

[Chatter Answers Implementation Overview](#)

[Setting Up Chatter Answers](#)

[Data Category Visibility](#)

[Create and Modify Category Groups](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

USER PERMISSIONS

To create or edit users:

- Manage Internal Users

To create article types and article actions:

- Customize Application AND Manage Salesforce Knowledge

To manage synonyms:

- Manage Synonyms

To create data categories:

- Manage Data Categories

Adding Chatter Answers to a Portal

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

You can add Chatter Answers to an existing Customer Portal or Partner Portal so that portal users can access Chatter Answers zones from one of your established channels. After users log in to one of your portals, they can access Chatter Answers from a tab and choose which zone to view from a drop-down list. If you only want to display Chatter Answers in your portals, then you don't need to set up a Lightning Platform site to host Chatter Answers. However, a site lets guest users access some Chatter Answers data without a login, whereas portals do not.

The following occurs to Chatter Answers when it appears in a portal:

- Chatter Answers displays as a tab, which you can rename.
- A drop-down list lets portal users switch between all of your Chatter Answers zones.
- The **My Settings** link for users is replaced by **Enable Emails** and **Disable Emails**.
- **Sign In** and **Sign Up** are removed because portal users can only view Chatter Answers after they've logged in to your portal.
- Chatter Answers displays a look and feel, which you can't customize.
- The **Need help?** link is removed.
- If you display Chatter Answers with a Visualforce page on a portal, the option for users to switch zones in a portal isn't available.

IN THIS SECTION:

[Add Chatter Answers to a Customer Portal](#)

[Adding Chatter Answers to a Partner Portal](#)

[Adding a Custom Visualforce Page to Display Chatter Answers](#)

Use a Visualforce page to provide a custom Chatter Answers experience for your customers.

Add Chatter Answers to a Customer Portal

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

You can add Chatter Answers to an existing Customer Portal so that portal users can access Chatter Answers zones from one of your established support channels.

1. Enable Chatter Answers for portals:
 - a. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
 - b. Click **Edit**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To add Chatter Answers to a Customer Portal:

- Customize Application

- c. Select `Show Chatter Answers in Portals`.
 - d. Click **Save**.
 2. Edit Customer Portal user profiles to support Chatter Answers.
Using the enhanced profile user interface, follow these steps:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click **Edit** next to a portal user profile.
 - c. In the Apps section of the page, select **Object Settings**.
 - d. On the Object Settings page, select **Q&A**.
 - e. In Tab Settings, select `Default On`.
 - f. Click `Save` and navigate back to the Objects Settings page.
 - g. Select **Questions and Answers**, and in the Object Permissions section select `Read` and `Create`.
 - h. Click **Save**.Using the original profile interface, follow these steps:
 - a. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
 - b. Click **Edit** next to a portal user profile.
 - c. In Tab Settings, select `Default On` for **Q&A**.
 - d. In Standard Object Permissions, select `Read` and `Create` on Questions.
 - e. Click **Save**.
 3. Add the Chatter Answers User feature license to Customer Portal users:
 - a. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
 - b. Click **Edit** next to a portal user.
 - c. In the General Information area, select `Chatter Answers User`.
 - d. Click **Save**.
 4. Add Chatter Answers as a tab to your Customer Portal:
 - a. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.
 - b. Click the name of a Customer Portal.
 - c. Click **Customize Portal Tabs**.
 - d. Select Q&A and click the **Add** arrow to move it into the Selected Tabs box.
 - e. Click **Save**.
 5. Optionally, rename the Q&A tab for your Customer Portal:
 - a. From Setup, enter `Rename Tabs and Labels` in the `Quick Find` box, then select **Rename Tabs and Labels**.
 - b. Click **Edit** next to Questions.
 - c. Click **Next**.
 - d. In Other Labels, rename Q&A. You can only rename it as `Singular`, not `Plural`.

- e. Click **Save**.

SEE ALSO:

[Adding Chatter Answers to a Portal](#)

Adding Chatter Answers to a Partner Portal

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

You can add Chatter Answers to an existing Partner Portal so that portal users can access Chatter Answers zones from one of your established partner channels.

1. Enable Chatter Answers for portals:
 - a. From Setup, enter *Chatter Answers Settings* in the **Quick Find** box, then select **Chatter Answers Settings**.
 - b. Click **Edit**.
 - c. Select *Show Chatter Answers in Portals*.
 - d. Click **Save**.
2. Edit Partner Portal user profiles to support Chatter Answers:
 - a. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
 - b. Click **Edit** next to a portal user profile.
 - c. In the Apps section of the page, select **Object Settings**.
 - d. On the Object Settings page, select **Q&A**.
 - e. In Tab Settings, select *Default On*.
 - f. Click *Save* and navigate back to the Objects Settings page.
 - g. Select **Questions and Answers**, and in the Object Permissions section select *Read* and *Create*.
 - h. Click **Save**.
3. Add the Chatter Answers User feature license to Partner Portal users:
 - a. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
 - b. Click **Edit** next to a portal user.
 - c. In the General Information area, select *Chatter Answers User*.
 - d. Click **Save**.
4. Add Chatter Answers as a tab to your Partner Portal:
 - a. From Setup, enter *Partners* in the **Quick Find** box, then select **Settings**.
 - b. Click the name of a Partner Portal.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To add Chatter Answers to a Partner Portal:

- **Customize Application**

- c. Click **Customize Portal Tabs**.
 - d. Select Chatter Answers and click the **Add** arrow to move the Chatter Answers tab into the Selected Tabs box.
 - e. Click **Save**.
5. Optionally, rename the Chatter Answers tab for your Partner Portal:
- a. From Setup, enter *Rename Tabs and Labels* in the **Quick Find** box, then select **Rename Tabs and Labels**.
 - b. Click **Edit** next to Questions.
 - c. Click **Next**.
 - d. In Other Labels, rename Q&A. You can only rename it as *Singular*, not *Plural*.
 - e. Click **Save**.

SEE ALSO:

[Adding Chatter Answers to a Portal](#)

Adding a Custom Visualforce Page to Display Chatter Answers

Use a Visualforce page to provide a custom Chatter Answers experience for your customers.

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

You must have a Visualforce page created that includes either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:categoryfilter`.

To add a custom Visualforce page for displaying Chatter Answers:

1. From Setup, enter *Tabs* in the **Quick Find** box, then select **Tabs** to display a list of your organization's Visualforce tabs.
2. In the Visualforce section, click **New** to create a new Visualforce tab.
3. Select the Visualforce page you want to use and add details for the other fields on the page.
4. Click **Next**.
5. Select which user profiles can see the tab.
6. Select the custom apps from which the tab will be available.
7. Click **Save**.

To add the Visualforce tab as a Community tab, make sure the page is available in the community's tabs.

To add the Visualforce tab to a Customer Portal, make sure the Visualforce tab is configured to show in the portal.

You don't need to add the Visualforce tab to a Lightning Platform site. Just make sure that you have created the Visualforce page with Chatter Answers components before you set up the site.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To create a Visualforce page:

- Customize Application

To add a Visualforce tab:

- Customize Application

Troubleshooting Chatter Answers Setup

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

After you set up a Chatter Answers community, you can view a snapshot of all of its configurations on one page so that you don't have to visit several pages in setup to diagnose issues.

1. From Setup, enter *Sites Settings* in the **Quick Find** box, then select **Sites Settings**.
2. In the Site Snapshot column, click **View** next to the Lightning Platform site associated with your community.
3. Click  to show or  to hide various settings.
4. Click **Go!** to go to a specific page in setup where you can change settings.

 **Example:** For example, you can use a site snapshot to see if the Lightning Platform site hosting your community is marked *Active* or to verify the names of the user profiles assigned to your Customer Portal.

SEE ALSO:

- [Chatter Answers Implementation Overview](#)
- [Chatter Answers Users Overview](#)
- [Setting Up Chatter Answers](#)

Chatter Answers Users Overview

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Use the following to manage the data and functions that are accessible to Chatter Answers users:

- Profiles, permissions, and access settings determine a user's permission to perform different functions, such as adding comments to a case.
- User licenses define which profiles and permission sets are available to a user, such as the High Volume Customer Portal (Service Cloud Portal User) or Customer Portal Manager Custom license.
- Feature licenses entitle a user to additional Salesforce features, such as Chatter Answers.
- Field-level security defines which fields users can access, such as fields on Salesforce Knowledge articles.

Chatter Answers excludes some features typically available to Customer Portal users, such as:

- Ideas

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To view Setup:

- View Setup and Configuration

To set up Chatter Answers:

- Customize Application

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

- Groups
- Teams
- Reports
- Content
- Page layouts
- Custom objects
- Delegated external user administration

Chatter Answers users can only access the following records from your zone:

- Cases
- Questions
- Replies (answers)
- Salesforce Knowledge articles

Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.

 **Note:**

- Chatter Answers users can't change their language, timezone, or locale settings.
- Portal users must have the Chatter Answers User feature license to use Chatter Answers. This feature license is automatically assigned to high-volume portal users who self-register for Chatter Answers. You can manually assign the license to users who don't self-register by editing a user and clicking `Chatter Answers User`.
- Authenticated Website User profiles don't have access to Chatter Answers.

Internal users with permission to see Chatter Answers can see all zones in the Q&A tab in their organization. If internal users sign in to a community, they see only those zones associated with that community.

IN THIS SECTION:

[Encouraging Participation with Chatter Answers Reputation](#)

SEE ALSO:

[Setting Up Chatter Answers](#)

Encouraging Participation with Chatter Answers Reputation

-  **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Tap into the expertise and knowledge of your most active community members by rewarding their activity. By enabling reputations, you let users earn points and ratings that display in hover details

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

over a user's photo in the feed. As your star posters engage more frequently, they improve the overall content in your community and provide better answers for users who are searching for help with an issue. This means that users who are searching for a solution can be confident that an answer from an expert can be trusted, which means fewer support calls for your organization.

The screenshot shows the Chatter Answers interface. On the left, there are navigation options: 'New here?' with a 'Sign Up' button, 'Have an account?' with a 'Sign In' button, 'Best Answers', 'Open Questions', and 'Topics' including 'Video Conferencing', 'General Questions', 'VX5', and 'Cirrus View'. The main content area features a search bar with the text 'What would you like to know?'. Below the search bar, a user's reputation is displayed: 'Newbie' (green), '5 Total Posts', and '1 Best Answer'. The user's name is 'Antony Passemard'. A question is posted: 'I need 4 webcams in the same room (one per person). Is this possible?' dated 'July 11, 2012' with 'Like 1' and 'Follow 0'. An answer is provided by 'Sarah Patel' dated 'July 11, 2012' with 'Like 0' and 'Follow 0'. The answer text is: 'We did this in one of our conference rooms. You do need to have the multiple HDMI in the extension card for your VX5. Once you have the card installed, you can have up to six web cams and have a split screen with everyone on the monitor.' A 'Show 3 answers' button is visible at the bottom of the answer section.

Users earn points when their posts receive votes or are selected as having resolved the question in any of the zones to which they belong. When they earn enough points, the hover details show their reputation as well as the number of posts and questions they've resolved in that zone. Reputation points are calculated separately for each zone, and for the cumulative activity within the entire organization. Users who participate in different zones will have different reputation values for each zone based on their activity in that zone. When users are logged into the internal application, their reputation score is based on their participation in all zones to which they belong.

Chatter Answers comes with the following pre-defined reputation levels that apply to all zones:

Name	Points per Level	Color
Newbie	0 – 499	Green
Smartie	500 – 1999	Blue
Pro	2000 – 4999	Purple
All Star	5000+	Orange

To add or edit reputation level names or points per level in any of your zones, use the `ChatterAnswersReputationLevel` object in the API. You can create up to 25 different reputation levels for each zone. Colors for the different reputation levels can be changed at the style sheet (CSS) level.

SEE ALSO:

[Chatter Answers Users Overview](#)

Chatter Answers Implementation Tips

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Consider the following information when planning and implementing Chatter Answers.

- We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.
- Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).
- You can customize fields, page layouts, buttons and links, Apex triggers, and validation rules for questions and replies for Chatter Answers from Setup by entering "Chatter Answers" in the `Quick Find` box, then selecting **Chatter Answers** and choosing the appropriate setting.
- After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:
 - A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
 - Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
 - Visualforce pages that you can add to a Lightning Platform site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.
 - An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
 - An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
 - A workflow field update named `chatter_answers_num_subscriptions_above_` so that when a question is escalated to a case, `Priority` on questions is updated.
 - Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.
- You can add Chatter Answers to an existing Customer Portal or Partner Portal so that portal users can access Chatter Answers zones from one of your established channels.
- Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.
- You can rename `Customer Support` on your zones' user interface. For example, you can change "Customer Support" to "Acme Support." Just edit the Customer Support label on the Question object.
- Questions escalated to cases display a Chatter-like feed on case detail pages. The case detail page also includes a Customer View section that lets support agents reply publicly or privately to the thread posted to the zone.
- Case comments marked `Public` display as private messages from customer support in Chatter Answers. They don't display to the entire community. For example, if a support agent adds a public case comment, it displays only to the case's contact private messages in Chatter Answers. Support agents can read all private and public case comments. .
- Chatter Answers sends email to users when they:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

- Sign up for an account.
- Follow a question (answers or comments).
- Receive an answer or comment to their question.
- Receive a private reply to their question from customer support.
- Internet Explorer 8 users receive a security warning if you customize with URLs that don't include https://.
- Before you make a zone public, add at least 20 frequently asked questions, answers, or articles. This content will generate conversations.
- Create Salesforce Knowledge articles that contain:
 - Your support organization's phone number so that customers can contact your support agents directly.
 - Terms and conditions for zone members, such as when support agents might delete customers' questions and comments.
- Chatter Answers uses the following API objects:
 - Case
 - ChatterAnswersActivity
 - ChatterAnswersReputationLevel
 - Community (Zone)
 - Question
 - QuestionReportAbuse
 - QuestionSubscription
 - Reply
 - ReplyReportAbuse

SEE ALSO:

[Chatter Answers Best Practices](#)

[Setting Up Chatter Answers](#)

Escalating a Question to a Case in Chatter Answers

If a question in Chatter Answers isn't resolved or its replies aren't satisfactory, administrators and trusted community members such as moderators can escalate the question to a case.

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

After a case is created, the question detail page provides a link to the case for the life of the question. This link also shows the status of the case.

To escalate a question to a case:

1. Click the question title.
2. Click the triangle next to the question to display the drop-down menu, and click **Escalate to Case**.

 **Note:** This option only appears if the user has permission to create cases. Users created from contacts cannot escalate questions to cases.

3. Update the case fields if you want to change any default values. The question title automatically becomes the case subject.
4. Click **Save**. You are returned to the question detail page, and the case is now available for the Case Owner to resolve.

 **Note:** Closing the case does not mark the question as resolved, and resolving the question does not close the case. The case and the question must be updated separately.

Chatter Answers Best Practices

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

Consider the following tips when planning and using Chatter Answers.

- We recommend that you tell support agents that:
 - The `Case Origin` field lists Chatter Answers on any case converted from a question.
 - If they answer a question privately, they can't convert it to a public answer.
- We recommend that you assign a support agent to review public questions from the Q&A tab. Agents can't click **Flag** next to questions or replies that are spam, hateful, or inappropriate, but they can edit and delete questions or replies from a zones via the Q&A tab if they have the "Delete" permission on questions.
- To moderate many questions quickly, we recommend that support agents review questions from pinned lists on the Salesforce console (this requires adding the Q&A tab to the console's Navigation tab).
- To see a list of cases converted from questions, we recommend that administrators or support agents create a case view where Case Origin equals Chatter Answers.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Q&A tab:

- Read on questions

To ask and reply to questions:

- Create on questions

To create cases:

- Create on cases

- Because photos added to profiles display externally on Chatter Answers, we recommend that support agents choose photos that match their company's policies and branding.

SEE ALSO:

[Chatter Answers Implementation Tips](#)

[Setting Up Chatter Answers](#)

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.

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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

USER PERMISSIONS

To view the Questions tab:	Read on questions
To ask and reply to questions:	Create on questions
To delete questions and replies:	Delete on questions
To escalate a question to a case:	Create on cases
To edit questions:	Edit on questions

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

-  **Note:** Answers will no longer be supported in all Salesforce orgs as of the Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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 will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.

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.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To view questions:

- Read on questions

- **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.

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

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.

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.com>.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.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Using the Chatter Answers Q&A Tab

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

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.
- View other users' total number of posts and number of replies marked as best answers by others.

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:

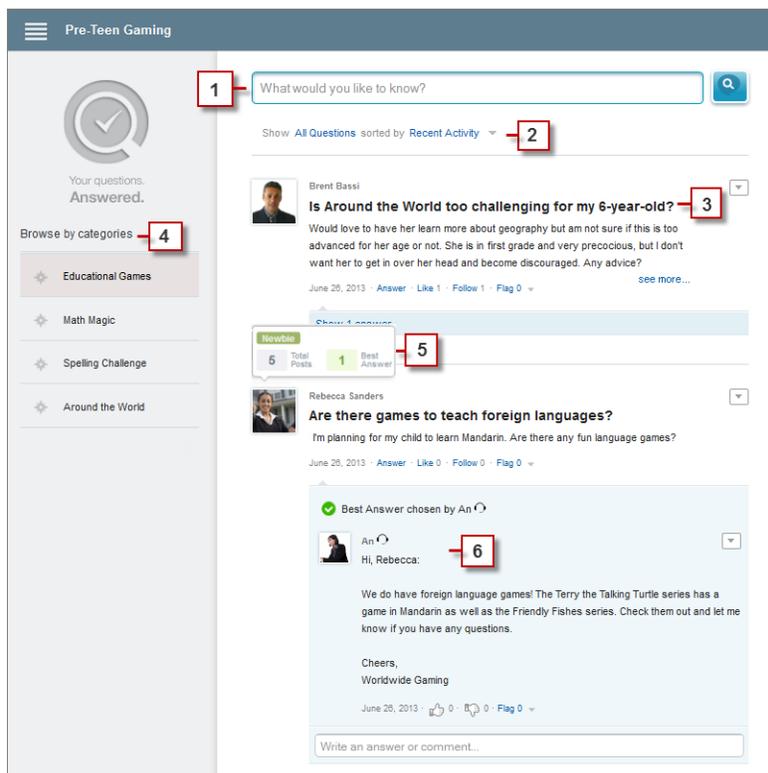
- Create on questions

To view cases:

- Read on case

To change cases:

- Edit on case



The screenshot shows the Chatter Answers interface for a community named "Pre-Teen Gaming". The interface includes a search bar (1), a filter dropdown (2), a list of questions (3), a "Newbie" badge (5), and a "Best Answer" section (6). The "Best Answer" section shows a question by Rebecca Sanders: "Are there games to teach foreign languages?" and an answer by An: "Hi, Rebecca. We do have foreign language games! The Terry the Talking Turtle series has a game in Mandarin as well as the Friendly Fishes series. Check them out and let me know if you have any questions." The interface also features a sidebar with categories like "Educational Games", "Math Magic", "Spelling Challenge", and "Around the World".

- 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
<ol style="list-style-type: none"> 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. 	<ol style="list-style-type: none"> 1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks Post Your Question. 2. No similar questions display in search results. 3. The customer continues to enter a description of the 	<ol style="list-style-type: none"> 1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks Post Your Question. 2. No similar questions display in search results. 3. The customer continues to enter a description of the 	<ol style="list-style-type: none"> 1. A customer types a question or keyword into the Chatter Answers Q&A tab and clicks Post Your Question. 2. A similar Salesforce Knowledge article with an answer displays in search results.

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
<p>3. The customer selects that question, and views the answer.</p>	<p>question and clicks Post to Community to post a public question.</p> <p>4. A community member or support agent reads the question and adds a comment, which answers the customer's question.</p>	<p>question and selects Post Privately to Representative to post a private question.</p> <p>4. The private question is converted to a case.</p> <p>5. A support agent reads the case and adds a private comment, which answers the customer's question.</p>	<p>3. The customer selects the article, and views the answer.</p>

IN THIS SECTION:

[Chatter Answers Terminology](#)

SEE ALSO:

[Chatter Answers Terminology](#)

Chatter Answers Terminology

 **Note:** Chatter Answers will no longer be supported in all Salesforce orgs as of Spring '18 release. For more information, see [End of Support for Chatter Answers 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.

The following terms are used when describing Chatter 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.

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.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

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.

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](#)

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.

EDITIONS

Available in: Salesforce Classic

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

 **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](#)
[HTML Solutions Overview](#)
[Tip Sheet: Tips & Hints for Solutions](#)
[Solutions Implementation Guide](#)
[Solutions Home](#)
[Tips on Writing Solutions](#)
[HTML Solutions Overview](#)
[Tip Sheet: Tips & Hints for Solutions](#)
[Solutions Implementation Guide](#)

Add Solutions

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.

IN THIS SECTION:

[HTML Solutions Overview](#)
[Multilingual Solutions Overview](#)
[Suggested Solutions Overview](#)
[Customizing Solution Settings](#)
[Getting Started with Categories](#)
[Enable Multilingual Solutions](#)
[Enabling Public Solutions](#)

EDITIONS

Available in: Salesforce Classic

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

HTML Solutions Overview

HTML solutions provide a more flexible way to create solutions, by allowing you to easily format paragraphs, and insert images and links. Using HTML solutions, you create solutions with an HTML editor and display those solutions to users in Salesforce, the Self-Service portal, the Customer Portal, and as public solutions.

Using the HTML editor, you can:

- Change fonts
- Increase or decrease font sizes
- Insert images from the Documents tab
- Set text color
- Set the background color of text
- Insert hyperlinks
- Change paragraph alignment
- Create bulleted and numbered lists

 **Note:** By default, solutions are created and displayed in text format. Your administrator must enable HTML solutions.

Before you begin creating HTML solutions for your organization, review the following implementation tips and best practices.

Implementation Tips

- Once you enable HTML solutions, you cannot disable it.
- If you open a text solution with the HTML editor and save it, the solution becomes an HTML solution.
- HTML solutions are presented as such to Self-Service portal, public solutions, Customer Portal, and Salesforce users.
- Any HTML tags entered into the HTML editor will display to users as text when the solution is saved.
- When the HTML solution detail is displayed in list views and search results, only the first 255 characters are displayed. This number includes HTML tags and images that are removed.
- Each HTML solution can contain up to 32000 characters, including HTML tags.
- HTML formatting is preserved in the printable view of a solution.
- Hyperlinks in HTML solutions open in a new browser window when users click on them.
- All images that you want to include in your HTML solutions must be uploaded to the Documents tab. Images in HTML solution details don't show up in list views and reports.
- HTML solutions can be created in any of the languages supported by Salesforce.

Best Practices

The following HTML tags are allowed in HTML solutions imported into Salesforce:

<a>	<dt>	<q>
<abbr>		<samp>
<acronym>		<small>
<address>	<h1>	
	<h2>	<strike>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create solutions:

- Create on solutions

<bdo>	<h3>	
<big>	<h4>	<sub>
<blockquote>	<h5>	<sup>
 	<h6>	<table>
<caption>	<hr>	<tbody>
<cite>	<i>	<td>
<code>		<tfoot>
<col>	<ins>	<th>
<colgroup>	<kbd>	<thead>
<dd>		<tr>
		<tt>
<dfn>	<p>	
<div>	<pre>	<var>
<dl>		

Within the above tags, you can include the following attributes:

alt	face	size
background	height	src
border	href	style
class	name	target
colspan	rowspan	width

The above attributes that can include a URL are limited to URLs that begin with the following:

- http:
- https:
- file:
- ftp:
- mailto:
- #

- / for relative links

SEE ALSO:

[Categorizing Solutions](#)

[Creating Solutions](#)

[Categorizing Solutions](#)

[Creating Solutions](#)

Multilingual Solutions Overview

The multilingual solutions feature helps you translate solutions and solution categories into the languages supported by Salesforce so that customers and support reps can find answers to inquiries in the language with which they are most comfortable.

Multilingual solutions can lower support costs by:

- Improving customer satisfaction by answering inquiries in the languages preferred by customers
- Deflecting unnecessary incoming calls by providing solutions in languages that are the most useful for customers
- Managing inquiries in multiple languages from one location, anytime and anywhere

Review the following key terms for multilingual solutions:

Master Solution

A solution created in any language supported by Salesforce. A master solution can have zero or more translations associated with it; it cannot be linked to another master solution.

Translated Solution

A solution translated into another language supported by Salesforce and associated with exactly one master solution. A translated solution cannot have the same language as its master solution or any other translated solutions associated with that master solution.

A translated solution cannot have other translated solutions associated with it. Translated solutions are represented by the  icon on solution detail pages, solution edit pages, solution list views, and solution search results.

You can work with multilingual solutions from the following:

Solutions Tab

When creating a new solution, users can choose a language in which to write the solution from the `Language` picklist field. Once the solution is saved, it becomes a master solution. Users can then create a translated solution by clicking **New** on the Translated Solutions related list of the master solution detail page. When a master solution is modified, users can adjust the statuses of its translated solutions to indicate that they may need translating.

Cases Tab

When users search for relevant solutions on a case by entering keywords in the Solutions related list and clicking **Find Solution**, search results include solutions in all languages that have matching keywords. Alternatively, if suggested solutions is enabled for cases, users can click **View Suggested Solutions** to find relevant solutions in multiple languages if they share common words with the case.

Self-Service Portal

If multilingual solution search is enabled for your Self-Service portal, customers automatically view solution search results in their preferred language as specified in their Self-Service user information settings. Customers can also choose to view solution search results in a specific language or all supported languages via a language drop-down list. By default, the Login Page of your Self-Service portal displays in your organization's language.

EDITIONS

Available in: Salesforce Classic

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

Public Solutions

If multilingual solution search is enabled for your public solutions, customers can choose to view solution search results in a specific language or all supported languages via a language drop-down list. By default, public solutions display in your organization's language.

Solution Categories

Users with the "Manage Translation" permission can use the translation workbench to translate solution categories so that they display in the language of each user on the Solutions tab and in the preferred language of each customer on the Self-Service portal as specified in the customer's user settings. Solution categories are not translated for public solutions.

Reports

You can track translated solutions marked `Out of Date` by choosing the Translated Solutions report. Running this report also lists the title and details of translated solutions. You can also create a custom report for multilingual solutions using the Master and Translated Solutions report type.

List Views

You can see which translated solutions are marked `Out of Date` and may need translating by creating a custom list view on the Solutions tab and entering the following search criteria: "Out of Date equals True".

Import

The Data Import Wizard includes options to import master and translated solutions and associate them with each other.

To learn more about enabling multilingual solutions, see [Enable Multilingual Solutions](#) on page 1157.

SEE ALSO:

[Enable Multilingual Solutions](#)

[Categorizing Solutions](#)

[Creating Solutions](#)

[Enable Multilingual Solutions](#)

[Categorizing Solutions](#)

[Creating Solutions](#)

Suggested Solutions Overview

The suggested solutions feature displays up to ten relevant solutions that may help users and customers solve a particular case from the case detail page, Salesforce Customer Portal, or the Self-Service portal.

Suggested solutions can lower support costs by:

- Reducing the time it takes for customer support reps to solve cases
- Improving customer support reps' productivity by offering them proactive access to all solutions for any case
- Enabling customers to solve and close their own cases

The solutions displayed are not simply found via a keyword search. Rather, the following variables are entered into a formula that automatically scores the relevancy of each solution to the particular case:

- Word frequency in all solutions
- Word frequency in similar cases with related solutions
- Proximity of the keywords within the solutions
- Word similarities to self-closed cases and solutions rated useful by Self-Service users
- The number of additional cases associated with a solution

You can enable suggested solutions for the following:

Cases tab

Users can click **View Suggested Solutions** from the case detail page to view a list of solutions relevant to their case. If multilingual solutions is enabled for your organization, search results return solutions in all languages that have matching keywords. However, search results across all languages might not be reliable because terms searched from one language to another are processed differently.

Customer Portal and Self-Service portal

Customers can view solutions relevant to their case when they submit a case or view cases online.

Customers can self-close their cases using suggested solutions.

When customers log new cases or click the **View Suggested Solutions** button on an existing case in the Customer Portal or Self-Service portal, a list of suggested solutions is displayed, including solutions in multiple languages for organizations with multilingual solutions enabled. When customers select a solution from the list, they can click **Yes** after **Does this Solution help you answer your question?** and then select a reason as to why they closed their case. The case will close with an indication on the `Closed by Self-Service User` case field. If the customer clicks **No**, they will be returned to the list of suggested solutions. If no suggested solutions are found, the Suggested Solutions Page is bypassed, and the customer is directed to their case.

Case auto-response rules and emails

Your support team can help customers solve their own cases without the assistance of customer support reps. Simply create email auto-responses for cases submitted via email, Web-to-Case, or the Self-Service portal. Within the auto-response email template, include the suggested solutions merge field, `{!Case_Suggested_Solutions}`, which provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries.

 **Note:** Sending mass emails using templates with the suggested solutions merge field can take several minutes and isn't recommended.

The `Closed by Self-Service User` field, along with a `Closed When Created` field, can be added to case [page layouts](#). These fields are automatically set by Salesforce and can't be modified. You can run reports on the `Closed by Self-Service User` and `Closed When Created` fields to see how cases have been closed.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable suggested solutions:

- Customize Application

To modify Self-Service pages:

- Manage Self-Service Portal

AND

Customize Application

- Report on the `Closed by Self-Service User` field to see how many cases have been closed by users via suggested solutions on the Self-Service portal
- Report on the `Closed When Created` field to see how many cases have been immediately saved and closed upon creation by support reps.

 **Note:**

- Suggested solutions don't display [Salesforce Knowledge](#) articles.
- Suggested solutions isn't available for the public solutions because public solutions users don't have an authenticated login that allows them to create or access cases.

SEE ALSO:

[Customize Support Settings](#)

[Multilingual Solutions Overview](#)

[Customize Support Settings](#)

[Multilingual Solutions Overview](#)

Customizing Solution Settings

To customize solution settings:

1. From Setup, enter `Solution Settings` in the Quick Find box, then select **Solution Settings**.
2. Click **Edit**.
3. Select `Enable Solution Browsing` to turn on the ability to browse for and find solutions by category.

This setting enables solution browsing on the Solutions tab, Customer Portal, and when solving a case.

4. Select `Enable Multilingual Solutions` to turn on the ability for users to [translate solutions](#) into multiple languages.

You can deselect the `Enable Multilingual Solutions` checkbox at any time, but deselecting it removes all associations between master and translated solutions and automatically disables the `Enable Multilingual Solution Search in Self-Service Portal` and `Enable Multilingual Solution Search for Public Solutions` settings. If you select the `Enable Multilingual Solutions` checkbox again, the associations between master and translated solutions are restored.

5. Select `Enable Multilingual Solution Search in Self-Service Portal` to add a language drop-down list to the Self-Service portal that automatically restricts search results to solutions that match the Self-Service portal user's language. From the language drop-down list, Self-Service portal users can choose whether to search for solutions in a specific language or any language supported by Salesforce.

Deselecting this checkbox removes the language drop-down list from the Self-Service portal, and search results include solutions in all languages, regardless of the Self-Service portal user's language.

6. Select `Enable Multilingual Solution Search for Public Solutions` to add a language drop-down list to public solutions so that public solutions users can choose which language to search for solutions. From the language drop-down list, public solutions users can choose whether to search for solutions in a specific language or any language supported by Salesforce.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change solution settings:

- [Customize Application](#)

Deselecting this checkbox removes the language drop-down list from public solutions, and search results include solutions in all languages.

7. Select **Enable HTML Solutions** to create and display solutions in HTML. When enabled, solutions appear in HTML in Salesforce, public solutions, Self-Service portal, and Salesforce Customer Portal. Using [HTML Solutions](#) allows users to easily format solution details by changing fonts and colors, and adding images and hyperlinks.



Warning: Once you select **Enable HTML Solutions**, you cannot disable it.

8. Select **Solution Summary** to display up to 150 characters of the solution details in the solution search results. Deselecting this checkbox removes the solution summary from the results.
9. Select **Inline Category Breadcrumbs** to display up to 150 characters of the breadcrumb trail of categories to which the solution belongs in the search results. Deselecting this checkbox removes the breadcrumbs from the results.
10. Click **Save**.
11. To enable solution browsing by customers in public solutions or your Self-Service portal, see [Enabling Public Solutions](#) on page 1159 and [Enable Self-Service Features and Settings](#) on page 1037.

In addition, you can customize the top-level category accessible by public solutions and Self-Service users. You do not need to modify this setting if you want customers to view all categories and all solutions that are visible in the Self-Service portal or visible in public solutions.



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

SEE ALSO:

[Categorizing Solutions](#)

[Managing Solution Categories](#)

[Enable Multilingual Solutions](#)

[Categorizing Solutions](#)

[Managing Solution Categories](#)

[Enable Multilingual Solutions](#)

Getting Started with Categories

Follow these steps to ensure a successful rollout of solutions:

1. Plan which categories your support team needs.

Keep in mind that you can also allow customers to find solutions by category in public solutions and your Self-Service portal. You can specify that customers can view only solutions in a particular category and all of its subcategories.

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

2. Define your categories; see [Defining Solution Categories](#) on page 1155.
3. Categorize your solutions; see [Categorizing Solutions](#) on page 1169. Administrators, and users with the "Manage Categories" permission, can categorize solutions prior to enabling solution categories for the entire organization.
4. Create a custom report of type Solution Categories to verify that all solutions are categorized appropriately. To find any uncategorized solutions, use the advanced report filters; choose the `Category Name` field and the "equals" operator, and leave the third field blank. Administrators, and users with the "Manage Categories" permission, can create solution category reports prior to enabling solution categories for the entire organization.
5. Enable solution category browsing for the Solutions tab; see [Customizing Solution Settings](#) on page 1153.
6. Enable solution category browsing for customers using public solutions and your Self-Service portal. See [Enabling Public Solutions](#) on page 1159 and [Enable Self-Service Features and Settings](#) on page 1037.
7. Specify the top-level category accessible by customers using public solutions and your Self-Service portal. This is useful if you want to have certain categories available only to internal staff.

Leave this blank if you want customers to view all categories and all solutions that are visible in Self-Service portal or visible in public solutions.

IN THIS SECTION:

[Defining Solution Categories](#)
[Managing Solution Categories](#)

SEE ALSO:

[Managing Solution Categories](#)
[Managing Solution Categories](#)

Defining Solution Categories

Begin by creating your solution categories. The All Solutions category is automatically created for you as the top of your solution hierarchy. Users cannot add solutions to this category or translate it.

1. From Setup, enter *Solution Categories* in the `Quick Find` box, then select **Solution Categories**.
2. Click **Add Category** to create a subcategory below a specific category.
3. Enter the category name. Category names cannot include the backslash "\" character.
4. Select a different parent category, if desired. The parent category is the category directly above this category in the hierarchy.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or change solution categories:

- [Manage Categories](#)

5. Select a sort order for any subcategories you create under this category.
 - Choose Alphabetical Order to sort subcategories alphabetically.
 - Choose Custom Order to sort subcategories in the order you specify; see [Adding and Sorting Subcategories](#) on page 1156.
6. Click **Save**.
7. After creating categories, categorize your solutions. See [Categorizing Solutions](#) on page 1169. Administrators, and users with the “Manage Categories” permission, can categorize solutions prior to enabling solution categories for the entire organization.
8. Then, after categorizing solutions, turn on solution category browsing on the Solutions tab. See [Customizing Solution Settings](#) on page 1153.
9. To enable solution category browsing for the public knowledge base or your Self-Service portal, see [Enabling Public Solutions](#).

Editing and Deleting Categories

From the list of solution categories, you can:

- Click **Edit** to modify the category name, parent category, or sort order.
- Click **Del** to delete the category. The solutions associated with the category are not deleted.
 -  **Note:** You cannot delete a category in use by a Salesforce Customer Portal. For more information, see [Enable Customer Portal Login and Settings](#).
- Click the category name to view the category details.

Adding and Sorting Subcategories

From a category detail page, you can:

- Click **New** to add a subcategory below the category.
- Enter a custom sort order for the subcategories.
 1. Edit the category to set the `Subcategory Sort Order` to Custom Order.
 2. Enter numbers in the Order column to specify the order of the subcategories.
 3. Click **Reorder**.

SEE ALSO:

[Categorizing Solutions](#)

[Categorizing Solutions](#)

Managing Solution Categories

Create solution categories so that users can group similar solutions together. Once your solutions are categorized, users can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse solutions by category in public solutions, the Self-Service portal, and the Customer Portal.

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

SEE ALSO:

[Getting Started with Categories](#)

[Defining Solution Categories](#)

[Getting Started with Categories](#)

[Defining Solution Categories](#)

Enable Multilingual Solutions

You can turn on multilingual solutions so users have the ability to translate solutions into multiple languages.

Preparing for Multilingual Solutions

Before you enable multilingual solutions:

- Run solution reports to locate any existing solutions that are already translated and will need to be converted to translated solutions after you enable multilingual solutions.

When multilingual solutions is enabled for the first time, all existing solutions automatically become master solutions. You can create translated solutions from master solutions by associating a master solution without any translated solutions with a master solution of a different language via the `Master Solution` lookup field.

- Translate any existing solution categories.

Translated solutions inherit the solution categories of their master solution. We recommend that you translate your solution categories before enabling multilingual solutions and then associate solutions with each other. This will help you associate solutions with the correct categories.

Enabling Multilingual Solutions

To enable multilingual solutions:

1. From Setup, enter `Solution Settings` in the `Quick Find` box, then select **Solution Settings**.
2. Click **Edit**.
3. Select **Enable Multilingual Solutions**.

Optionally, select **Enable Multilingual Solution Search in Self-Service Portal** and **Enable Multilingual Solution Search for Public Knowledge Base** to allow customers to view solution search results in a specific language or all supported languages via a language drop-down list.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or change solution categories:

- `Manage Categories`

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable multilingual solutions:

- `Customize Application`

4. Click **Save**.
5. Customize solution page layouts to include the `Master Solution Title` field, `Master Solution Details` field, `Out-of-Date` field, and the Translated Solutions related list. The `Language` picklist and `Master Solution` lookup fields are automatically added to solution page layouts when you enable multilingual solutions.

 **Tip:** You can make solution edit pages easier for users to translate multilingual solutions by setting the Detail Information section to two columns and placing the `Master Solution Title` and `Master Solution Details` fields alongside each other. Underneath those fields, place the `Solution Title` and `Solution Details` fields alongside each other so that users can effortlessly compare the master and translated solutions. Note that the `Master Solution Title` and `Master Solution Details` fields display only on the translated solution edit page.

6. Set the field-level security settings of the `Master Solution` lookup field to editable for profiles or permission sets with the “Create” and “Edit” permissions on solutions.

When the `Master Solution` lookup field is editable, users can associate translated solutions with master solutions. Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

7. Set the field-level security settings of the `Out of Date` checkbox field to visible for all profiles or permission sets with the “Read” permission on solutions.

Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

8. As a best practice, add a long text area custom field to solutions called `Translation Comments` and include it on solution page layouts so that users can add any comments regarding the translation of the solution. Users should include a date with their comments so that other users can see when each comment was added.

 **Note:** You can deselect the `Enable Multilingual Solutions` checkbox at any time, but deselecting it removes all associations between master and translated solutions and automatically disables the `Enable Multilingual Solution Search in Self Service Portal` and `Enable Multilingual Solution Search for Public Solutions` settings. If you select the `Enable Multilingual Solutions` checkbox again, the associations between master and translated solutions are restored.

Rolling Out Multilingual Solutions

After enabling multilingual solutions:

- Associate any existing translated solutions with the appropriate master solutions.

You can do this manually using the `Master Solution` lookup field, or you can export a report of existing translated solutions and then import those solutions to associate them with a master solution. For each translated solution you import, include the 15 to 18 character `Solution ID` field of its master solution in a master solution column on your import file. To view the `Solution ID` field for master solutions, run the Translated Solution report. If you import solutions by mistake, you can use mass delete to remove them from your organization.

SEE ALSO:

[Multilingual Solutions Overview](#)

[Support a Multilingual Knowledge Base](#)

[Categorizing Solutions](#)

[Multilingual Solutions Overview](#)

[Support a Multilingual Knowledge Base](#)

[Categorizing Solutions](#)

Enabling Public Solutions

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

Using the Solutions tab, your customer support team can create solutions that people outside of your organization may find helpful. Using HTML code supplied by Salesforce, and with the help of your website administrator, you can add a search box and button to your website that allows your customers to search for solutions. This functionality is known as Public Solutions.

With public solutions, your customers can find answers to frequently asked questions without having to call your customer support center. All solutions with a `Status` of Reviewed and the `Visible in Public Knowledge Base` field checked will be available as public solutions, including any solution attachments.

Public solutions are different from the Self-Service portal because users are not required to log in, and they can only search for solutions, not submit cases. For more information about the Self-Service, see [Setting Up Your Self-Service Portal](#) on page 1035.

 **Note:**

- The search box and button are displayed in a frame; your website must support frames in order for the solution search feature to work.
- Suggested solutions don't display [Salesforce Knowledge](#) articles.

To enable Web access to solutions:

1. From Setup, enter `Public Solutions` in the `Quick Find` box, then select **Public Solutions**.
2. Click **Edit**.
3. Check `Public Solutions Enabled`.
4. If your organization uses solution categories, check `Enable Solution Browsing` to allow customers to browse solutions by category. Solution categories cannot be translated into other languages for public solutions.

If multilingual solutions is enabled for your organization, you can add a language drop-down list to public solutions so that customers can choose which language to search for solutions. For more information, see [Customizing Solution Settings](#) on page 1153.
5. If solution category browsing is enabled, select the `Top-Level Category` accessible by customers in public solutions. Customers can view all solutions in this category and its subcategories if they are marked `Visible in Public Knowledge Base`. Leave `Top-Level Category` blank if you want customers to view all solutions in all categories when they are visible as public solutions.
6. If desired, you can change the appearance of the frame on your website by specifying the `Maximum Page Width` and `Minimum Page Height`.
7. Provide the URL of your CSS page in `Style Sheet URL`. The CSS file does not have to exist yet; you can download a sample file as a starting point later, or use your own file.
8. You can change the word or phrase that is used to describe solutions in the frame in `Alternative Term`. Provide singular and plural versions of the term.
9. Click **Save**.
10. If desired, click **Download Sample CSS File** to get the Salesforce style sheet.
11. Click **Generate HTML**.
12. Copy the resulting HTML code and click **Finished**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable web access to solutions:

- [Customize Application](#)

13. Send the HTML (and the CSS file, if you downloaded it) to your website administrator to be added to your site as follows:

- Add the HTML to your Web page.
- Customize the downloaded style sheet.
- Host the style sheet in a publicly accessible location on your Web server.

Work with Solutions

Use solutions to provide detailed descriptions and resolutions of customer issues.

IN THIS SECTION:

[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](#)

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view solutions:

- Read on solutions

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:

[Solve Cases](#)

[Multilingual Solutions Overview](#)

[Solve Cases](#)

[Multilingual Solutions Overview](#)

Displaying and Selecting Solutions

USER PERMISSIONS

To view solutions:	Read on solutions
To attach a solution to a case:	Read on solutions and cases AND Edit on cases
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

EDITIONS

Available in: Salesforce Classic

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

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](#)

[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](#)

[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**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view solution lists:

- Read on solutions

To create solutions:

- Create on solutions

To change solutions:

- Edit on solutions

To delete solutions:

- Delete on solutions

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create solutions:

- Create on solutions

 **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](#)

[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](#)

[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**.

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](#)
- [Solution Fields](#)
- [Creating Solutions](#)
- [Categorizing Solutions](#)

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

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](#)

[Solutions Overview](#)

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.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To categorize solutions:

- Edit on solutions

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:

[Searching for Solutions](#)

[Solve Cases](#)

[Searching for Solutions](#)

[Solve Cases](#)

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:

[Multilingual Solutions Overview](#)

[Solution Fields](#)

[Multilingual Solutions Overview](#)

[Solution Fields](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change the status of translated solutions:

- Edit on solutions

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 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](#)
- [Solutions Overview](#)
- [Creating Solutions](#)
- [Searching for Solutions](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view Solutions tab:

- Read on solutions

To view solutions:

- Read on solutions

To create solutions:

- Create on 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](#)

[Solutions Overview](#)

[Solution Fields](#)

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.
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)

EDITIONS

Available in: Salesforce Classic

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

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Field	Description
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	<p>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.</p> <p>Available for organizations with multilingual solutions enabled.</p>
Public	<p> Note: Before Spring '14, this field was called <code>visible in Self-Service Portal</code>.</p> <p>Indicates the solution is available in the Self-Service Portal and Customer Portal.</p> <p>If Communities is enabled in your organization, this field specifies whether a solution is visible to external users in communities.</p>
Solution Details	<p>Detailed description of the solution. Up to 32 KB of data are allowed.</p> <p>Solution details are either displayed in text or HTML, depending on how your organization is set up.</p> <p>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.</p>
Solution Number	<p>Automatically generated identifying number. (Read only)</p> <p>Administrators can modify the format and numbering for this field.</p>
Solution Title	Title of the solution describing the customer's problem or question.
Status	<p>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.</p>
Visible in Public Knowledge Base	<p>Indicates the solution is a public solution.</p> <p>This field only applies to solutions, not articles in the public knowledge base.</p>
Custom Links	Listing of custom links for solutions set up by your administrator.

SEE ALSO:

[Creating Solutions](#)

[Displaying and Selecting Solutions](#)

[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?](#)

EDITIONS

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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](#)
- [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](#)
- [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](#)
- [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](#)

[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](#)

[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](#)

Service Cloud Printed Resources

In addition to online help, the Service Cloud has guides to help you learn about and successfully administer your Service Cloud features.

If you're looking for the HTML version of our developer doc, head over to [Salesforce Developer Documentation](#) and search for your feature there.

Case Management

	End Users	Admins	Developers
Core Cases			
Case Management Implementation Guide		✓	
Publisher and Quick Action Developer Guide			✓
Entitlements and Milestones			
The Admin's Guide to Entitlement Management		✓	
Omni-Channel			
Omni-Channel for Administrators		✓	
Omni-Channel Supervisor	✓		
Omni-Channel Developer Guide			✓

Console

	End Users	Admins	Developers
Salesforce Console Implementation Guide for Salesforce Classic		✓	
Salesforce Console Developer Guide			✓

Channels

	End Users	Admins	Developers
Call Center			
Open CTI Developer Guide			✓
Live Agent			
Live Agent for Administrators		✓	
Live Agent for Support Supervisors	✓		
Live Agent for Support Agents	✓		
Live Agent Developer Guide			✓
Live Agent REST API Developer Guide			✓
Snap-Ins			
Snap-ins Chat		✓	

	End Users	Admins	Developers
Service Cloud Snap-Ins for iOS			✓
Service Cloud Snap-Ins for Android			✓
Set Up SOS Video Chat and Screen-Sharing		✓	
Social Customer Service			
Complete Guide to Social Customer Service	✓	✓	
Social Studio API Developer's Guide			✓

Knowledge

	End Users	Admins	Developers
Complete Guide to Salesforce Knowledge		✓	
Lightning Knowledge Guide		✓	
Salesforce Knowledge Developer Guide			✓

Field Service

	End Users	Admins	Developers
Complete Guide to Field Service Lightning	✓	✓	
Field Service Lightning Mobile User Guide	✓		
Field Service Lightning Developer Guide		✓	✓

More Features

	End Users	Admins	Developers
Salesforce CRM Content Implementation Guide		✓	
Self-Service Portal Implementation Guide		✓	
Salesforce Customer Portal Implementation Guide		✓	

SEE ALSO:

- [Service Cloud](#)
- [Salesforce Console](#)

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