Chatter Customer Online Help

Salesforce, Summer '18

@salesforcedocs

CONTENTS

ABOUT CHATTER

What is Chatter and what can I use it for?

Chatter is a collaboration application that helps you connect with colleagues, partners, and customers to share business information securely and in real time.

- Update your profile so that your colleagues can identify you and learn more about you.
- Post updates, files, or links to groups you belong to.

What browsers does Chatter support?

Chatter supports the following browsers:

- Google Chrome™, most recent stable version
- Mozilla® Firefox®, most recent stable version
- Windows® Internet Explorer versions 7, 8, and 9
- Apple® Safari® versions 5.x, 6.x and 7.x on Mac OS X

Note: For all browsers, you must enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017. We recommend a minimum screen resolution of 1024 x 768 for the best possible user experience.

GROUPS

What are Chatter groups?

Chatter groups let you collaborate with specific people. For example, if you're working with a team on a project, you may be invited to a Chatter group to collaborate with that team. You can share files and updates relevant to the project or other team members.

How do I join Chatter groups?

Customers can't join groups. You must be added to a group by the group's owner or one of its managers.

Can I create Chatter groups?

Customers can't create and own Chatter groups, but they can be group managers.

What are broadcast groups and how can I create them?

Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can create new posts. Group members can comment on the posts created by the group owner or manager. By restricting the ability to post, group owners and managers can keep group discussions focused and relevant by cutting down noise from off-topic posts. Public, private, and unlisted groups support this feature.

To set a group to broadcast mode, select **Broadcast Only** in the group settings. You can do this only if you’re the group manager.

What are archived groups?

When a Chatter group is archived, group members can no longer post content or share files with the group. Previous posts, comments, and files remain available in the group.

Archived groups allow users to focus on the active groups in your organization:

- Archived groups don't count toward a user's group membership limits.
- Posts from archived groups don't display in Chatter feeds, unless someone adds a comment. Posts with new comments display in the All Company (Salesforce Classic) feed. They may display in the Company Highlights (Lightning Experience) feed, provided they rank highly due to their popularity or degree of engagement (such as their comments, likes, and views). Posts with new comments also display in the feed of each group member.
- File and feed sharing is limited to active groups only, making group searches more efficient.
- Archived groups display only in My Archived Groups and not in the Active Groups list.

How do I archive a group?

You can archive a group if you're a manager of the group.

1. Click **Group Settings** on the group detail page in the Salesforce Classic. In the Lightning Experience, click **Edit Group** from the buttons in the group header.
2. Configure archiving for the group in one of two ways:
   - Click **Archive** to archive the group right away.
   - Select **Archive this group if there are no posts or comments for 90 days** and click **Save** to set up automatic archiving.

After you archive a group:

- The publisher on the group page is hidden and members can't create new posts or share files in the group.
- The group no longer appears in the Active Groups filter on the Groups tab.
- Previous group posts and comments no longer appear in the Chatter feed, unless someone adds a comment. Posts with new comments display in the All Company feed (Salesforce Classic) and the feed of each group member. They may appear in the Company Highlights feed (Lightning Experience), depending on the post's popularity ranking and engagement (such as likes, comments, and views).

Group members don't receive email notifications when a Chatter group they own, manage, or belong to is archived or activated.

How do I activate an archived group?

You can activate groups that you manage. Use the **My Archived Groups** filter on the Groups tab to find the group to activate. You can also use global search to find archived groups. On the group detail page, click **Activate**.

What are unlisted groups?

Unlisted groups offer more privacy for compared to private groups. Only group members and users with the "Manage Unlisted Groups" permission can access unlisted groups in list views, feeds, and search results.

Unlisted groups are similar to private groups, in that, only members can view an unlisted group's detail page, feed, or files. However, unlisted groups provide more privacy compared to private groups.

- Unlisted groups don’t display in list views, feeds, and search results for nonmembers. Only members and users with the “Manage Unlisted Groups” permission can find and access unlisted groups.
- Nonmembers can’t visit the group detail page.

  (With private groups, nonmembers can see a truncated version of the detail page, which shows the name, description, and member list, but not the feed or files.)
- You can convert unlisted groups to public or private groups, but not the other way around.
- Only group owners, group managers, and users with the “Manage Unlisted Groups” permission can add group members. Users can’t ask to join them.
- Users can’t see unlisted groups on other user profiles unless they have access to the group.
- Files shared in unlisted groups are visible only to the members of the unlisted group. If the file is shared outside the unlisted group, then other users with permissions can update the file.
- Even users with the “Modify All Data” or “View All Data” permissions can’t access an unlisted group or its files unless they’re members. They also can’t change group settings unless they own or manage the group.
- Only users with the “Manage Unlisted Groups” permission can access or modify unlisted groups and its files and feed content without membership.

Are there any limitations of unlisted groups that I should be aware of?

If you decide to create an unlisted group, make sure that you consider these limitations.

- Custom pages or third-party applications integrated with Salesforce could expose unlisted group information to users who don't have access via the Salesforce UI. Check in with your administrator about who can access information in unlisted groups in your organization.
- You can’t use topics in unlisted groups. You can add a hashtag topic when writing a post or comment in an unlisted group, and the topic will be formatted as a link after you post. However, a topic detail page isn’t created, and the link won’t work.
- You can’t mention unlisted groups in posts or comments.

Can I invite people to join a group I'm in?

If you're the group manager, you can invite people.

Note: You can only invite people whose profiles you can see to join a group. As a customer, you only see profiles of people in your groups and therefore can't invite other Chatter users that aren't in common groups with you.

How do I accept or decline requests to join a group I manage?

How do I filter and sort groups?

Click **Groups** in the Chatter sidebar, then click:

- **My Groups** to see you the groups you belong to or manage
- **Recently Viewed** to see the groups you recently looked at, starting with the group you viewed last
- Click a column header to sort the list. The Group column sorts by group name; the Last Activity column sorts by the date of the last post or comment on a group; the Membership column sorts based on your membership status.

What can Chatter group members, managers, and owners do?

Customers can't be owners.

Action	Owner	Manager	Member
Post, comment, and search group feeds	Yes	Yes	Yes
Add and remove records in groups (if configured)	Yes	Yes	Yes
Post group announcements	Yes	Yes	
Delete posts and comments	Yes	Yes	
Add and remove members	Yes	Yes	
Change member roles	Yes	Yes	
Edit group settings	Yes	Yes	
Edit the Information field	Yes	Yes	
Archive groups and activate archived groups	Yes	Yes	
Change group owner	Yes		
Delete group	Yes		

Users with the “Modify All Data” permission can perform all actions on all private and public groups, and users with the “View All Data” permission can view details of all private and public groups, regardless of membership.

Additionally, in unlisted groups:

- Users with the “Manage Unlisted Groups” permission can find and perform all of these actions in unlisted groups, even if they aren’t members.
- Users with the “Modify All Data” or “View All Data” permission can only find and access unlisted groups if they are members. Unlike public and private groups, users with the “Modify All Data” permission can’t perform group owner actions in unlisted groups. They can perform group manager actions if that role is assigned to them in the unlisted group.

How do I post group announcements?

Post group announcements to highlight important messages on the group page. If your administrator has added the Announcement action to the group publisher, group owners, group managers, and users with the “Modify All Data” permission can post and delete group announcements.

1. On the group page, click **Announcement** in the publisher.
2. Type your message. The character limit is 5,000, and you can include links or mention users and groups in your announcement. Due to space constraints, approximately 137 characters of the announcement displays on the group page. Click **More** to see the rest of the message.

3. Click **Share**.

The group announcement displays in a yellow highlighted area below the group photo and as a post in the group feed. Group announcements display until 11:59 p.m. on the selected expiration date, unless they're replaced by a new group announcement. Users can discuss, like, and post comments on announcements in the group feed. Group members receive an email notification when you post an announcement, same as for other posts, depending on their selected group email notification frequency.

PROFILES

What are profiles?

Your profile is a personal page that summarizes your user information. The Feed tab displays your personal Chatter feed, and the Overview tab includes contact information, group membership, file ownership, and activity statistics and influence.

Why should I customize my profile?

Customize your profile with a photo and information about yourself so colleagues can learn more about you. To view and update your profile, click your name in the Chatter sidebar, or `Your Name` > **My Profile** at the top of any page.

How do I view someone else's profile?

View other people's profiles by clicking **People** in the Chatter sidebar, then clicking their name. You can also click a name on a feed or anywhere else around Chatter. You can see their photo, name, title, email, common group memberships, common files, and activity statistics and influence.

How do I search the feed on a user’s profile?

Use feed search on page 25 to find information in posts and comments that display on a user’s profile page.

How do I add or update my photo?

Upload a photo to your profile so people can see who you are.

1. View your profile by clicking your name in the Chatter sidebar, or `Your Name` > **My Profile** at the top of any page.
2. Hover over the stock photo and click **Add Photo**, or if you previously added a photo, click **Update**.
3. Click **Browse...**.
4. Select a file to upload and click **Open**.

Note: Photos can be .jpg, .gif, or .png format up to 8 MB.

5. Drag the dotted lines in the photo to create a thumbnail image that displays next to your name or the group's name around the application.
6. Click **Save**.

FILES

- What can I do on the Files page?
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- How do I delete a file?

What can I do on the Files page?

Click **Files** on the Chatter sidebar to view the Files page, where you can easily upload, store, find, share, preview, download and collaborate on files in the cloud. This includes files you own or have access to from Chatter groups you're a member of and files shared privately with you. All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files.

What files are in the Files list?

Files are automatically added to the file list when:

- You upload a file.
- You attach a file to a record.
- You or someone else attaches a file to a Chatter feed or comment.
- Someone else shares a file privately with you using the Sharing dialog box.
- You upload a file to a Salesforce CRM Content library.
- Someone else uploads a file to a library you're a member of.

- You or someone else creates a content pack or uploads a Web link in Salesforce CRM Content. You only see files from content packs and Web links you have access to.
- You or someone else shares a file with a group you're a member of.
- Someone shares a file privately with you.

Can I upload a new version of a file?

File owners and collaborators can upload new versions. When you upload a new version of a file, people with access to the previous version get a notification in their Chatter feed, including options to preview and download the file. Uploading a new version replaces all previous versions in Chatter, but previous versions are still available by clicking **Show all versions** on the file detail page.

To upload a new version:

1. Upload a new version from any of these locations:
   - On the file detail page—Click **Upload New Version**.
   - Next to the file in a feed—Click **More Actions** > **Upload new version**.
   - Next to the file on the **Files** page, the Files Shared with list on a group, or the Files Owned by list on a profile—Click > **Upload New Version**.
   - On a file hover—Click **Upload New Version**.
2. Click **Browse**, and select a file from your computer.
3. Optionally, add information about the changes you made to the file in the `What Changed` dialog box. The information is shown on the Version History list.
4. Click **Upload New Version**.

The file detail page and any previous posts show the updated version.

Can I see a file's version history?

Yes. The file detail page shows the current version number of the file. View the Version History list to see all versions of the file that have been uploaded, including the current version. From the list you can download the file, see who updated it and when, and see the description if provided. The file detail page always shows the most current version of a file.

How do I post a file to a group's feed?

You can post files to feeds on groups you belong to, except archived groups.

1. Click **File** at the top of your feed to attach a file to a post, or **Attach File** below a comment to attach a file to a comment.
2. Click **Upload a file from your computer** to attach new files from your computer.
3. Browse for the file you want to attach.
4. Add a post or comment about the file. If you don't enter any text, a generic update is posted with your attachment.
5. Click **Share**.

When a file is posted to a feed, everyone in your company can see it even if the file started out as private. Only files posted in a private group stay private within that group.

How do I share a file with someone?

1. Start by sharing the file from one of these locations:
   - On the detail page of the file you want to share—Click **File Sharing Settings** > **Share with people**. Or click **Sharing Settings** and then click **People** on the Sharing Settings dialog box.
   - Next to the file in a feed—Click **More Actions** > **File Sharing Settings** then click **People** on the Sharing Settings dialog box.
   - Next to the file on the Files home page—Click **Share with people**.
   - On a file hoverClick **Share File** then click **People** on the Sharing Settings dialog box.
2. Type the name of the person you want to share the file with and click the name to select it. .
3. Choose the file permission you want them to have. By default, they have collaborator permission which lets them view, download, share, change permission, edit the file, and upload new versions. Select **Viewer** to give them permission to view, download, and share files.
4. If you want to share the file with more people, enter more names.
5. Optionally, add information to the message that recipients receive.
6. Click **Share** and **Close**. Recipients receive a message that you have shared a file with them, along with a link to the file. Lightning Experience users receive this message as an email notification. Salesforce Classic users get a private Chatter message on their My Messages page on the Chatter tab, and also get an email notification if they have email notifications for Chatter messages enabled.

On the Sharing Settings dialog box, click next to a person's or group's name to stop sharing the file with them.

How do I let someone know I shared a file with them?

Recipients automatically receive a message in their My Messages page. The message lets the recipient know you shared a file with them, along with any additional information you provided. If they're already receiving email notifications, they'll be notified of a new message.

How do I share a file with a group?

1. Share the file from one of these locations:
   - On the detail page of the file you want to share—Click **File Sharing Settings** > **With group**. Or click **Show All** on the Shared With list then click **Groups** on the Sharing Settings dialog box.
   - Next to the file in a feed—Click **More Actions** > **File Sharing Settings** then click **Groups** on the Sharing Settings dialog box.
   - Next to the file on the Files page, the Files Owned by list, or the Group Files list—Click **Share with groups**.
   - On a file hover—Click **Share File** then click **Groups** on the Sharing Settings dialog box.
2. Type the name of the group you want to share the file with and click the name to select it. Repeat this step to share with more groups.
3. Select access levels for each group. By default, private group access is set to **Collaborator**, while public group access is set to **Viewer**.
4. Optionally, add a message to your post. You can @mention people and groups in your message to notify them and post the file in their feed.
5. Click **Share** and **Close**. The file is posted to each group you shared it with and @mentioned.

On the Sharing Settings dialog box, click next to a person's or group's name to stop sharing the file with them.

How do I share a file with anyone via link?

You can share a file with anyone by creating a file link and sending it via email or IM. Creating a link generates an encrypted URL that you can send to any recipient, such as leads, customers, partners, and coworkers, inside or outside of your company. The recipient opens a web-based version of the file that they can easily preview and download. File link recipients can only view and download files. They can't be collaborators.

Create and Share a File Link in Salesforce Classic

1. Start by sharing the file from one of these locations:
   - On Files home —Click **Upload files**, select a file from your device, then click **Sharing Settings**and choose **Anyone with Link**. Copy the link provided to share with people inside or outside your company.
   - On a file detail page—Click **File Sharing Settings** > **Via link**.
   - On the Sharing Settings dialog box—Click **Anyone with link** from the Share with list.
   - Next to the file on the Files page, the Files Owned by list, or the Group Files list—Click > **Share via link**.
   - Next to the file in a feed or on a file hover—Click **More Actions** > **File Sharing Settings**, then click **Anyone with link** from the Share with list.
2. Click **Copy** if available (or copy the link manually), and paste the link into an email or IM. File link recipients can only view and download files. They can't be collaborators.

On the Sharing Settings dialog box, click next to a link to stop sharing it. Anyone with the link will no longer be able to access the file.

Can I see where a file is shared?

The **Shared With** list on a file detail page shows you who the file is shared with, and their level of access. click **Show All** to open Sharing Settings, where you can:

- – See who the file is shared with and their permission: owner, collaborator, viewer, or no access.
  – Click **People** on the Sharing Settings dialog box to share the file with specific people.
  – Click **Groups** on the Sharing Settings dialog box to share the file with specific groups.
  – Click **Library** to share the file with a library.
  – Click **Anyone with link** on the Sharing Settings dialog box to create and share a file link.
  – Click **Make private** to remove the file and file link, if applicable, from everywhere it's been shared. Only owners and users with the "Modify all Data" permission can make a file private ().
  – On the Sharing Settings dialog box, click next to a person's or group's name to stop sharing the file with them.

What if I shared a file, but want it to be private again?

To stop sharing a file you own, make the file and the file link private ().

1. From the file detail page of the file you want to make private, click **Share File** > **Sharing Settings** or **Show All** on the Shared With list.
2. On the Sharing Settings dialog box, click **Make private**.
3. On the confirmation dialog box, click **Make private**.

Can I preview files without downloading them?

To preview a file, click:

- The preview ( ) icon next to the file on:
  - The Files list
  - The Files Owned by list on a profile
  - The Group Files list on a group
- The file thumbnail on a feed or on a file hover
- **More Actions** > **Preview** next to a file on a feed

Note: Files larger than 25 MB, unknown file types, password-protected files, and copy-protected PDFs can't be previewed. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce admin who may be able to regenerate the preview.

How do I see more details about a file?

Click a file name to view the file detail page.

Can I edit a file's details?

To edit a file's name and description:

1. On a file detail page, click **Edit Details** or click the edit icon ( ) next to the description.
2. Optionally, edit the file name and description.
3. Click **Save**.

Can I search for or filter the list of files on the Files page?

Yes. Click a filter in the sidebar to see and search within that selection of files.

- **Recent**—The most recent files you've viewed.
- **Owned by Me**—Files you have uploaded to Salesforce in Chatter, libraries, and directly in File home.:
- **Shared with Me**
- **Following**

What actions can a file owner, file collaborator, and file viewer perform?

Action	File Owner	File Collaborator	File Viewer
View or Preview	Yes	Yes	Yes
Download	Yes	Yes	Yes

Action	File Owner	File Collaborator	File Viewer
Share	Yes	Yes	Yes
Attach a File to a Post	Yes	Yes	Yes
Upload New Version	Yes	Yes	
Edit Details	Yes	Yes	
Change Permission	Yes	Yes	
Make a File Private	Yes		
Delete	Yes		

How do I change someone's permission on a file?

File owners can also change file permissions for files shared with their company.

To change a file permission:

1. On a file detail page, click **Share File** > **Sharing Settings**.
2. Find the person or group whose access you want to change. Or change access for `Any Chatter user in your company`.
3. Select **Viewer**, **Collaborator**, or **No Access** (for your company). Or, for files shared with records (Salesforce Classic only), change to **Set by Record**. The change happens immediately.
4. Click **Close**.

How do I remove a file from a feed?

To remove a file from a feed, you must delete its post by clicking , which appears on hover. When you delete a post that includes a file, you're not deleting the file, just the reference to the file. The file remains in its original location or goes back to the owner's Files list. You can delete your own posts from groups you belong to or from your profile feed.

How do I delete a file?

Click **Delete** on a file detail page to delete the file and remove it from all locations where it's been shared. If the file is shared via link, anyone with the link will no longer have access to the file. You can only delete files you own.

INVITATIONS

Can I invite other customers to join a group?

If you are the manager of the group, you can invite others to join. You can invite:

- People that aren't part of the Chatter network
- People already on the Chatter network that you're in common groups with

If you're not a manager, you can ask a manager to invite the people you want included.

How do I invite other customers to a group?

If you're the group manager, you can invite other customers to join.

1. Go to the group.
2. In the Members section, click **Invite People**.
3. Enter email addresses and, optionally, a personal message.
4. Click **Send**.

> Note: If a user doesn't accept the invitation within the first day, Chatter sends an email reminder the second day. If the user doesn't accept that invitation, Chatter sends another reminder the following day.

Why do I get an error saying that I can't send invitations to certain people for security reasons?

You'll see this message if you try to invite someone that is already part of this Chatter network, but you don't have access to their profile. As a group manager, you can only invite people whose profiles you can see to join a group. Since you're also a customer, you only see profiles of people in your groups and therefore can't invite other Chatter users that aren't in at least one group with you.

CHATTER MESSAGES

What are Chatter messages and what can I use them for?

Use Chatter messages to privately communicate with a few select people when a discussion isn't relevant to everyone you work with. Messages also notify people when a file has been shared with them.

Who can I send messages to and who can see them?

You can send messages to anyone who belongs to a group that you belong to, including other customers. Messages don't appear in your feed, your profile, global search results, or any other part of Chatter that's publicly visible.

How do I view my messages?

View your messages by clicking **Messages** in the Chatter sidebar. On the messages page, you can:

- See the most recent message in each of your conversations. The most recent message displays at the top of the list.
- See the photo of the person who sent the most recent message in a conversation.
- See if you have unread messages ( ).
- See if you sent the most recent reply ( ) in a conversation.
- Click any message to view the full history of messages exchanged in that conversation.
- Send a message by clicking **New Message**.

Your messages are organized into conversations, with each conversation defined by the unique combination of people participating in it. For example, let's say you send a message to Sally Smith. When Sally replies, her message continues your one-on-one conversation. Every new message you send to Sally—even if it's about a different topic—also continues the same conversation. Over time, you build a rich conversation history with Sally that contains every message you've ever exchanged with her. At the same time, let's say you send a message to both Sally Smith and Bob Johnson. That message is considered part of a separate conversation between you, Sally, and Bob. When Sally replies, her message continues a separate conversation from your one-on-one conversation with Sally.

How do I send a message?

To send a Chatter message:

1. Start the message from one of these locations:
   - Click **Messages** in the Chatter sidebar, then click **New Message**.
   - Click a person's name anywhere in Chatter to view their profile and click **Send a message**.
   - Click **Send a message** on a person's hover.
   - When viewing the full message history of a conversation, use the text box under the most recent message to send a reply.
   - When viewing the email notification about a message you've received, reply to the email.

   Sharing a file with people is another way to send a Chatter message. When you share a file, recipients automatically receive a message that lets them know the file has been shared, as well as any additional information you provided.
2. If you started in the Send a Message dialog box, you can add people's names to the recipient list. Type a name in the **To** field and click the name to select it. Add more people to the conversation by entering additional names. If you're replying within a conversation or via email, the conversation participants can't be changed.
3. Write your message. Messages can be up to 10,000 characters.
4. Submit your message using the appropriate method:
   - In the Send a Message dialog box, click **Send**.
   - If you're replying within a conversation, click **Reply** (or **Reply All** if the conversation involves multiple recipients).
   - If you're replying via email, use the Send option in your email application.

If your message continues an existing conversation, your reply is added to the conversation and appears at the top of the list in My Messages. If your message starts a new conversation because you haven't previously exchanged messages with that unique combination of recipients, your message appears at the top of the list in My Messages as a brand new conversation.

How many people can I send a message to?

Conversations can involve just one other person, or up to 10 people total, including yourself. You can't send a message to yourself.

How do I know when I have new messages?

The **Messages** link on the Chatter sidebar shows the number of conversations with new messages. If you're already receiving email notifications, you'll automatically be notified of new messages.

How do I add or remove people after a conversation has started?

Conversation participants are established when someone sends the first message in the conversation. No one can add people or remove people from the conversation after the first message is sent.

Can I search my messages?

Yes. You can search for people and text in your messages.

1. In My Messages, enter your search terms in the search box above your messages. Keep in mind these simple search tips:
   - If you're viewing your list of conversations, search looks for matches across all conversations. If you're viewing a single conversation, search looks for matches only within that conversation.
   - Searching for a person's name (such as `bob johnson`) finds both the conversations where Bob Johnson is named in the text as well as conversations where he's a participant. If you search for your own name, search results will include all of your messages and conversations because you're a participant in every conversation.
   - Searching for `bob jo` finds both Bob Jones and Bob Johnson. We automatically search for terms starting with `bob jo`, as if you had entered the * (asterisk) wildcard (`bob jo*`)
   - If you search for the term `customer`, you'll see matches on that term within the text of messages. Matches don't include people who are identified as customers in a conversation's participant list.
2. Click **Search**.
3. Once you see the search results, you can:
   - Refine your search by entering additional search terms.
   - Click a message to view the full conversation if you initially searched across all conversations.

Note: If there are matches on names in the participant list and the conversation involves lots of people, the match might not be visible because the participant list doesn't show everyone's name. In other words, you'll see the conversation included as a match but the highlighted name match might be hidden from view.

Clear your search terms by clicking . Chatter automatically clears your search when you enter a reply, send a new message, or leave My Messages.

Can I delete messages I no longer want?

No. You can't delete messages or conversations.

@MENTIONS

I see names with an @ symbol before them in my feed. What does that mean?

@Mentioning individual people or a group is a way to keep them informed when you're discussing something relevant to them.

How do I mention someone in a post or comment?

To mention someone:

1. Enter `@` followed by the first few letters of the person's name.
2. Select the person from the list of matches.
3. Post your update.

   The following happens:

   - The person's name becomes a link to their profile.
   - Your update appears on the mentioned person's profile feed and in their To Me filter.
   - Chatter emails a notification to the person you mentioned. The person also receives a notification every time somebody comments on the update where they were mentioned.

   You can't have more than 25 mentions in a single post or comment.

How do I see all posts where people mention me?

Click **To Me** in the Chatter sidebar.

How do I search for mentions?

Search for mentions by entering `@` followed by a person's name (such as *`@Madison Rigsby`*) in the header search box. In the search results, click **Search Feeds** to see where Madison Rigsby is mentioned in Chatter posts and comments.

To search for mentions in a specific feed, use the feed search on that page.

Can I mention someone who's not in a group?

No, mentions must be to people in the same group. If you mention someone in a group they don't belong to, the mention appears as a gray link (instead of a blue link), and the mentioned person won't see the update.

FEEDS

How do I sort the posts in my feed?

You can either see the latest posts or latest posts that have comments at the top of your feed. To sort your posts, click **Post Date** or **Most Recent Activity** at the top of your feed.

What are bookmarks?

Bookmarks are a way to keep track of Chatter and quickly find posts that interest you. When you bookmark a post, you get an email notification when someone comments on that post.

How do I bookmark a post?

1. Click the down arrow at the top right corner of the post you want to bookmark to expand the drop-down menu.
2. Click **Bookmark**. The bookmark icon ( ) displays next to the post to indicate that you successfully saved the post to your bookmarks.

Click **Feed** > **Bookmarked** on the Chatter sidebar to see your bookmarked posts in your feed.

How do I remove a bookmark?

1. Click **Feed** > **Bookmarked** on the sidebar to see your saved posts in your Chatter feed.
2. Find the saved post in your Chatter feed.
3. Click the down arrow at the top right corner of the post to expand the drop-down menu.
4. Click **Remove Bookmark**.

After you remove the bookmark, the post no longer shows up in your bookmarked posts when you click **Bookmarked**.

Can I search within a specific feed?

Use feed search to find information in any feed, including on a user's profile, and in a public or private group (if you're a member).

TOPICS

I see # followed by a word in my feed, such as **#file**. What does it mean?

When you post or comment in Chatter, you can associate your post or comment with all other posts and comments on the same subject by adding a topic. A topic is a way to categorize your post or comment so other people can find it more easily.

How do I add a topic to my update?

1. When writing an update, type `#` followed by any text. As you type, you can pick a topic from the list of suggestions, or press ENTER at any time to add a new topic that can be up to three words.
2. Click **Share**. For single word topics, the topic becomes a link that you can click to view all posts an comments that use the same topic.

   To see all the posts and comments that use a multiple word topic, you must search for the topic using brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type `#[universal paper]` in the search box. If you know you're interested in staying on top of this particular topic and you don't want to manually search for it, you can add it to your favorites. See Chatter Favorites.

How do I search for a topic?

Search for hashtag topics by entering `#` followed by the topic (such as `#SalesReport`) in the header search box. Search results return feed items that contain your search terms.

To search for a topic in a specific feed, use the feed search on that page.

To search for hashtag topics with multiple words, use brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type `#[universal paper]` in the search box.

Can I delete a topic from my update?

Once you post an update, the only way to delete a topic is to delete the entire post or comment.

Are there any characters I can't include in a topic?

Commas (,) and closing square brackets ( ]) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

CHATTER FAVORITES

What are Chatter favorites?

Chatter favorites give you easy access to Chatter feed searches and hashtag topics that you want to stay on top of. For example, if you and your coworkers use the hashtag topic #acme to track information about your customer Acme, you might want to add #acme as a favorite so you can easily access these updates.

You can have up to 50 favorites. If you haven't added any favorites, the Favorites section doesn't appear in the Chatter sidebar.

How do I add feed search favorites?

1. Enter terms in the header search box and click **Search**.
2. Click **Search Feeds** to see the posts and comments that include your search terms.
3. Click **Add to Favorites**. The favorite name is the same as the search terms.

How do I add hashtag topic favorites?

1. Click a single word hashtag topic, such as #acme, to see the posts and comments with the hashtag topic.

   To see all the posts and comments that use a multiple word topic, you must search for the topic using brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type `#[universal paper]` in the search box.

2. Click **Add to Favorites**. The favorite name is the same as the hashtag topic or the search terms, for example, **#acme** or **#[universal paper]**.

How do I remove Chatter favorites?

Click , which appears on hover, to remove a favorite.

CHATTER SEARCH

How do I find information in Chatter?

Use the global search at the top of the page to find feeds, files, groups, and people.

1. Enter your search terms in the header search box.
2. Click **Search**.
3. From the search results, click an item to open it.

   Click **Search Feeds** at the top of the page to view Chatter feed search results that include your search terms. Click **People, Groups & Files** to return to Chatter people, groups, and files results.

You can also use feed search to find information in a specific context.

How can I use Chatter feed results?

Search results for Chatter feeds display posts and comments that include your search terms.

- Sort your search results by posts only or by posts and comments, just as in feeds.
- Comment on, like, share, bookmark, and delete posts in the search results, just as in feeds.
- Share, download, preview, and upload files in the search results, just as in feeds.
- View the detail pages for Chatter files, groups, and people by clicking the respective name in the update.
- View a single feed update by clicking the timestamp below the update, for example, **Yesterday at 12:57 AM**.
- Click **Add to Favorites** to save a feed search to your favorites on the Chatter sidebar.

How do I search feeds in a specific context?

Use feed search ( ) to find information in a feed in a specific context. You can search for information in feeds on groups, and user profiles.

Click above the feed to look for information in that feed. For example, use the feed search on a group's page to find information in that group. Type your search terms and press ENTER or click .

You can search for hashtag topics, mentions, and files posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases. Search results display with matching terms highlighted. Filters or sorting criteria used in the feed apply to feed search results as well. Click to clear your search results and return to the feed.

How do I find all posts and comments with a specific hashtag topic?

Search for hashtag topics by entering `#` followed by the topic (such as *`#SalesReport`*) in the header search box. Search results return feed items that contain your search terms. To search for hashtag topics with multiple words, use brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type *`#[universal paper]`* in the search box.

How do I find all posts and comments with a specific mention?

Search for mentions by entering *`@`* followed by a person's name (such as *`@Madison Rigsby`*) in the header search box. In the search results, click **Search Feeds** to see where Madison Rigsby is mentioned in Chatter posts and comments.

How can I refine my search?

You can use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. For example, searching for *`bob jo*`* finds items with *Bob Jones* and *Bob Johnson*, and searching for *`jo?n`* finds items with *john* and *joan*. You can also use the AND, OR, AND NOT, ( ) (parentheses), and " " (quotation marks) operators to refine results.

SETTINGS

Approved Connections Settings

What are approved connections?

Approved connections is the list of external applications that can access your data in Chatter. You authorize this access the first time you run the external application. For example, if you use Chatter Desktop, you created a connection between the Chatter Desktop application and the login you use to access Chatter on the Web. The first time you authorized the connection in Chatter Desktop, it was saved as an approved connection.

To view your approved connections, click `Your Name` > **My Settings** at the top of any page, then click **Approved Connections**. You can view and remove your approved connections on this page but you can't add them directly.

What happens if I remove an approved connection?

Removing an approved connection means that you're revoking the external application's access to your data in Chatter. The next time you access the external application, you won't be able to connect using the previously authorized login.

Warning: Only click **Remove** if you're sure you want to revoke the connection. There is no confirmation step and the approved connection is removed immediately.

To restore a connection that you've removed, simply create the connection again the next time you access the external application. After you authorize the connection, it's saved as a new approved connection.

Email Settings

What do my Chatter email notification settings control?

Chatter can email you when someone comments on your posts or comments, or when you receive a new message.

How do I change Chatter email notification settings?

1. Click `Your Name` > **My Settings** > **Email Settings**.

2. In General Settings, select `Receive emails` to receive Chatter email.

   Warning: Deselecting this option prevents you from receiving all Chatter email notifications.

3. In Personal Settings, select the types of email you want to receive.
4. Click **Save**.

Consider these email tips:

- Daily digests include up to the 50 latest posts from the previous day while weekly digests include up to the 50 latest posts from the week. Both include the three latest comments on each post.
- Chatter sends daily digests at approximately 12:00 a.m. every day, and weekly digests at approximately 12:00 a.m. on Sunday. For user digests, the time is according to the user's time zone. For group digests, the time is according to the organization's time zone. Neither time is configurable.
- You won't receive digests when there are no updates.
- In communities, the `Email on every post` option is disabled once more than 10,000 members choose this setting for the group. All members who had this option selected are automatically switched to `Daily digests`.
- Chatter personal email digests are not supported in Communities.
- If you select `Comments after me` or `Comments on an item I like`, you receive email notifications for up to 10 comments after yours. Commenting again later in the post resets the count and allows you to receive email notifications for up to another 10 subsequent comments.
- Get `Sends me a message` notifications when people send you private Chatter messages, including notifications about files that have been shared with you.

Can I turn on email notifications for my Chatter groups?

Yes, click a group's name in Email Settings and select or deselect the types of email you want to receive for that group. You can also turn on, off, and modify email notifications for a group by clicking `Email Me...` on a group page and selecting a frequency.

I see that I can reply to some Chatter email notifications. How do email replies work?

When you receive certain email notifications, you can conveniently perform some actions by replying directly from your email. You can reply to the types of email listed in the table, or any notification that displays a `From` address of `reply@chatter.salesforce.com`.

Action	Type of Email	Text to Include in Your Reply	Limits
Bookmark a post	Someone posted to your profile or a group, mentioned you in a post, or shared your post	*`bookmark`*	N/A
Comment on a post	Someone posted, commented on your post, also commented after you, or mentioned you in a post or comment	The text of your comment	1,000 characters maximum. Replies that exceed the limit are truncated to the first 1,000 characters.

Action	Type of Email	Text to Include in Your Reply	Limits
Follow someone	Someone posted, commented on your post, also commented after you, or mentioned you in a post or comment	`follow`	N/A
Like a comment	Someone commented on your post or also commented after you	`like` or `+1`	N/A
Like a post	Someone posted to your profile or a group, mentioned you in a post, or shared your post	`like` or `+1`	N/A
Mute a post	Any post or comment email when you no longer want to receive notifications for the original post	`mute`	N/A
Respond to a Chatter message	Someone sent you a message	The text of your response	10,000 characters maximum. Replies that exceed the limit are truncated to the first 10,000 characters.
Unfollow someone	Someone posted, commented on your post, also commented after you, or mentioned you in a post or comment	`unfollow`	N/A
Unlike a post	Someone posted, commented on your post, or also commented after you on a post that you previously liked	`unlike` or `-1`	N/A

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 aren't processed.
- Replies to bookmark, mute, like or unlike, and follow or unfollow must contain only the single word or exact text, such as `like` (case insensitive) or `+1`. If you include extra white spaces or the original message that some email applications automatically include, we ignore them and process the reply as a like, bookmark, etc. However, if you include any other text in the body, such as `Like!` or `Like this?`, we process your reply as a comment rather than a like, bookmark, etc.
- 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 Chatter. Or, add a separator line to the top of your signature to have it automatically removed. The separator line must have a minimum of one of the following characters:
  - Dash (–)
  - Equal sign (=)

- Underscore (_)

You can also use any combination of these characters or dash dash space (`-- `), which respects RFC 3676 4.3.

- Attachments and mentions in replies are ignored.
- 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.yourInstance.salesforce.com`. Some email applications automatically use the `From` address from the original email, `reply@chatter.salesforce.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 `Reply-To` section, copy the email address that looks like: `w8t27apy1@j321imd9gbs.d8rx.d.chatter.yourInstance.salesforce.com`.
  4. Paste the reply-to address in the `To` field of your reply email.

Location Settings

- Can I change my language or timezone?

Can I change my language or timezone?

Yes. To set up your date, time, and language settings for Chatter, click *`Your Name`* > **My Settings** at the top of any page, then click **Location Settings**.

You can change the following fields (in alphabetical order):

Field	Description
`Language`	Your preferred language. All text and online help is displayed in this language.
`Locale`	Your country or geographic region. The `Locale` setting affects the format of date, date/time, and number fields, and the calendar. For example, dates in the English (United States) locale display as 06/30/2000 and as 30/06/2000 in the English (United Kingdom) locale. Times in the English (United States) locale display using a twelve-hour clock with AM and PM (for example, 2:00 PM), whereas in the English (United Kingdom) locale, they're displayed using a 24-hour clock (for example, 14:00).
`Time Zone`	Your closest time zone. Your region's Daylight Savings Time rules are respected.

Security Settings

- How do I change my password?

- How do I change my security question?
- I was trying to remember my password, but couldn't and now I'm locked out of Chatter. How long will this last?
- When I'm locked out of Chatter, can I reset my password?

How do I change my password?

1. Click `Your Name` > **My Settings** > **Security Settings**.
2. Type your current password in the `Current Password` field.
3. Type a new password in the **New Password** and **Verify New Password** fields.
4. Click **Save**.

How do I change my security question?

1. Click `Your Name` > **My Settings** > **Security Settings**.
2. Type your current password in the `Current Password` field.
3. Select a new security question and type the answer.
4. Click **Save**.

I was trying to remember my password, but couldn't and now I'm locked out of Chatter. How long will this last?

You can enter a password up to 10 times before being locked out of Chatter. After that you are locked out for 15 minutes.

When I'm locked out of Chatter, can I reset my password?

After the 15 minute lockout period ends, you can reset your password.

Chatter Desktop

Important: Chatter Desktop is retiring in June 2018. For more information, see Chatter Desktop Retirement.

- What is Chatter Desktop?
- Can I use Chatter Desktop?
- How can I get Chatter Desktop?
- How can I learn more about Chatter Desktop?

What is Chatter Desktop?

Chatter Desktop is a free desktop application that lets you collaborate in Chatter without a browser. Use Chatter Desktop to post and comment in Chatter, and receive updates about your groups and the people and files you follow. Chatter Desktop also supports chat, private Chatter messages, and displays Chatter updates and private messages as popup notifications in your Windows taskbar or Mac OS X Dock.

Can I use Chatter Desktop?

Yes, customers can use Chatter Desktop to perform the same Chatter tasks they perform in the browser.

How can I get Chatter Desktop?

To install Chatter Desktop, click `Your Name` > **My Settings** > **Chatter Desktop**, then click **Download Now** and follow the on-screen instructions.

How can I learn more about Chatter Desktop?

Chatter Desktop has its own help system. To access it, launch Chatter Desktop, click , and select **Help**.

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