



# Salesforce.com Summer '14 Release Notes



Last updated: September 10, 2014



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# About the Release Notes

The release notes provide information about new major Salesforce features and major enhancements to existing features.

You can choose from PDF and [HTML](#) versions. The release notes include:

- Brief, high-level descriptions of the functionality
- Setup information
- Implementation tips to help you get started
- Best practices to ensure your continued success

The release notes also identify all other changes and provide details about how those changes might affect your organization.

## ***Feature Summary and User Impact Tables Are Easier to Use***

Easily find out which features are already enabled for users.

## ***Stay Informed about Updates***

Use Twitter to get documentation updates.

## ***You Asked for It!***

We delivered the features you asked for on IdeaExchange.

## ***Your Feedback Matters***

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

## ***Links in the Release Notes May Not Work before the Salesforce Release***

Some links to the Salesforce Help, implementation guides, tip sheets, and developer guides won't work until the Salesforce release itself is available in your sandbox or production organization.

## ***Other Resources***

In addition to these release notes, we provide other resources to get you up to speed quickly.

## ***Release Notes Changes***

Changes to the release notes are documented here.

# Feature Summary and User Impact Tables Are Easier to Use

Easily find out which features are already enabled for users.

The headings in the [Feature Summary and User Impact](#) tables now show more clearly whether features:

- Are enabled for users
- Are enabled for administrators or developers
- Require administrator setup
- Require you to enable them by contacting salesforce.com

## Stay Informed about Updates

Use Twitter to get documentation updates.

When you follow [@salesforcedocs](#) on Twitter, you'll receive notices whenever we publish new documentation or make significant updates to existing documentation.

## You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered
Activity Due Date and Type Fields Available in Formulas and Validation Rules: Partially implemented	Use Formulas to Track and Validate Activities by Date or by Date and Time
Standard "Send an Email" function for Salesforce1 app	Add a Simple Version of the Case Feed Email Action to Salesforce1
Visualforce Home Page Component Type	Home Page Components
Increase case attachment size	Attach Larger Files, Up to 25 MB, to Objects
Contact Full Name (Middle Name, Suffix, etc)	Middle Name and Suffix Fields Available for Person Objects (Beta)
Customize PricebookEntry Object	Customizable Price Book Entries
Allow Standard Pricebook in 24.0 Apex Test @isTest(SeeAllData=false) feature	Create Price Book Entries in Apex Tests
Historical Trending for Forecasts	Historical Forecast Comparisons & Trending
Keep Favorite Report Folders In View	Pin Reports Folders
Custom Settings Need Permissions	Custom Permissions (Developer Preview)

## Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

- **Feedback forms:** As you're working with our documentation—whether it's in the Salesforce Help, release notes, or developer guides at Developer Force—look for the feedback form and vote up or down. Add comments if you have them.
- **Twitter:** Tweet us at [@salesforcedocs](#).

# Links in the Release Notes May Not Work before the Salesforce Release

Some links to the Salesforce Help, implementation guides, tip sheets, and developer guides won't work until the Salesforce release itself is available in your sandbox or production organization.

## Other Resources

In addition to these release notes, we provide other resources to get you up to speed quickly.

- [Release Readiness community](#). Join a community of Salesforce experts.
- [Release demos](#). Get quick video overviews of what's coming this release.
- [Release Training](#). Learn about online and instructor-led training changes and additions.

## Release Notes Changes

Changes to the release notes are documented here.

### September 10, 2014

#### [API Access Change for Connected Apps](#)

Added information about an API access change for some salesforce.com and partner connected apps, including Salesforce1, Salesforce for Outlook, and Connect for Outlook. All users of connected apps affected by this change must have the "API Enabled" profile permission turned on to allow access to all features.

### September 3, 2014

#### [Data Loader Now Supports Partner User Logins](#)

Added information about Data Loader support for partner userlogins.

### August 27, 2014

#### [Differences in Working with Salesforce Data in Salesforce1](#)

Added information clarifying support for rich text area fields in the different versions of the Salesforce1 app.

#### [Knowledge One Search Page Generally Available](#)

Added information on the Knowledge One search page, when it is enabled automatically, how it is enabled manually, and how to search articles and external sources on the new page.

### August 20, 2014

#### [New Security Requirement for Addresses Used as From Addresses in Case Feed Email Action](#)

Added a release note for this new security requirement.

#### [Configure a Custom Domain for Your Community](#)

Added information about how your domain name affects the target of your CNAME.

## August 13, 2014

### Salesforce1 Enhancements

Salesforce1 for iOS Version 6.0 Generally Available

What's new in version 6.0:

- View Salesforce data with Offline Cache
- Access publisher actions without Chatter enabled
- Quickly switch between accounts in multiple organizations and communities
- Sort list views

## August 6, 2014

### Configure a Custom Domain for Your Community

You can now set up a custom domain with HTTPS so that your community URLs reflect your company brand. Contact salesforce.com to enable HTTPS custom domains.

## July 30, 2014

### Help and Training

Added the new "How to Build an Image Formula" video.

### Multi-User Calendar View Security Improvements Enabled

Corrected the Sales feature impact table to indicate that the security improvements in the multi-user calendar view are enabled for users. It's not necessary to contact salesforce.com to enable the improvements.

### Salesforce Notification Banner

Specified that the Salesforce Notification Banner is not customizable.

### Increased Limits for Total Rules

Clarified that the limit for active rules hasn't changed.

### BlackBerry Z30 Support for the Salesforce1 Mobile Browser App

Announcing new support for using the Salesforce1 mobile browser app in BlackBerry® Browser on BlackBerry Z30 devices with BlackBerry OS 10.2.1.3175 or later.

## July 23, 2014

### LMA Support for Sandbox Installations

Updated the ISVforce feature impact table to show that LMA support for sandbox installations is enabled by default.

## July 16, 2014

### Add the Attachment Component to Case Feed

Corrected the name of the Attachment Component Visualforce component to `<support:caseUnifiedFiles>`.

### End of Support for Legacy Answers

Added the End of Support for Legacy Answers announcement.

### Other Changes in Live Agent

Added the Desktop Notifications Supported in More Browsers announcement.

## July 9, 2014

### Community Engagement Console

Added link to the new *Communities Managers Guide*.

### Salesforce1 Enhancements

Salesforce1 for iOS Version 5.3 Generally Available

What's new in version 5.3:

- Salesforce1 for iOS version 5.3 requires iOS 7 (iOS 6 users can continue to download version 5.2.1)
- The Publisher now has a transparent background when opened so you can stay in context when performing an action
- Larger image previews in the main feed
- Share fires externally via web link
- Performance improvements and bug fixes

### Sync Owned Files Directly from Feed Posts, Comments, File Lists, and File Detail Pages

Updated the screenshot and instructions to account for a minor change to the UI text.

## July 2, 2014

### Salesforce1 Enhancements

Added information that Salesforce Events are available from the navigation menu in the Salesforce1 downloadable apps, version 5.3 or later. Also added information that default custom links are now available on record detail pages when viewed in Salesforce1.

### Store, Sync, and Share with Salesforce Files Sync (Generally Available)

Added a note explaining that Salesforce Files Sync is available within 24 hours of the release.

### Improved Help & Training Search Experience

Updated details about survey prizes.

### New and Changed Apex Classes

Added two new methods: `System.equals` and `System.hashCode`.

### New Partner Community

Updated topic to reflect addition of integrated search, online training signup, and cases functionality.

### Enhanced Privacy for Data.com Contacts with Canadian Addresses

Added information about changes to the Data.com do-not-contact preference.

## June 26, 2014

### Status and Account Fields Make Task Lists More Useful

Corrected the description of one of the fields added to the task lists on the Home tab and the calendar day view. The field `Account` was added, not the field `Related To`.

### Other Changes in Analytics

Added a note about limitations on floating headers in report charts.

## June 20, 2014

### Auto-Complete for Article Keyword and Title Searches

Added a release note for Auto-Complete in Salesforce Knowledge.

### Track Forecasting Changes

Updated the release note to clarify that forecast historical trending applies to Collaborative Forecasts only.

### Help and Training

Added a section about Trust and Compliance Documentation.

### Improvements to Remote Objects (Developer Preview)

Added a section explaining a new error when attempting to make changes that violate field level security.

### Improved Help & Training Search Experience

Added a section about new enhancements to the Help & Training search experience.

## June 11, 2014

### Salesforce1 Enhancements

Salesforce1 for Android Version 5.3 Generally Available

What's new in version 5.3:

- Push notifications for new Tasks
- Additional push notification settings
- Call History with contact matching for easy call logging and contact creation
- Share fires externally via web link
- Ability to search dashboards

### Sync Owned Files Directly from Feed Posts, Comments, File Lists, and File Detail Pages

Added a release note describing another way to sync files using Salesforce Files Sync.

### Changes to the Files Tab with Salesforce Files Sync Enabled

Updated the screenshot and added information about syncing files from the Files tab.

### New and Changed Objects

Moved the process approval history objects from the SOAP API section to the New and Changed Objects sections.

### Microsoft® Windows® 8.1 Phone Support for the Salesforce1 Mobile Browser App (Beta)

Announcing beta support for the Salesforce1 mobile browser app in Internet Explorer® 11 on Nokia™ Lumia™ 1020 and HTC™ 8X phones that are running Windows 8.1. The mobile browser app isn't supported on mobile phones with Windows 8.0 or on Windows tablets.

### Match Production Licenses to Sandbox without a Refresh

Updated this section with the Salesforce version requirement for sandbox and production and clarified the license matching process.

## June 4, 2014

### Cross-Object Field References in Flows

Updated the syntax requirements to identify that in cross-object field references, API names for custom objects must end in \_\_r.

### Increased Maximum Number of External ID Fields

The release note was slightly revised to clarify the change. Additionally, the release note was moved to group it with several other limit increases.

**May 28, 2014****Generate Orders (Pilot)**

Improved the screen image callouts.

**Community Templates for Self-Service (Beta)**

Changed from Generally Available to Beta release.

**Enable Territory Management 2.0**

Updated the topic to state that enabling Territory Management 2.0 (Beta) automatically clears the value (if any) in the `territory` field on opportunity records in your organization.

**Metadata Types and Fields**

Updated the topic to identify the addition of `Territory2` as a value for the `ReportType Categories` field.

**Metadata Types and Fields**

Added information about the new `QuestionPost FeedItemType` value for `FeedLayout`.

# Feature Summary and User Impact

Summer '14 has features that immediately affect all users after the release. You may want to communicate these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

When will you start seeing Summer '14 changes on your instance? The best way to find out is to check the Major Release Schedule section of the Salesforce trust site at [trust.salesforce.com/trust/maintenance/](http://trust.salesforce.com/trust/maintenance/).

These release notes describe the new and modified features available in this release. For visibility into known salesforce.com issues, please refer to the [Known Issues Site](#).

This table summarizes the Summer '14 features and their impact on users. Review the feature details for the applicable Salesforce editions.

## General Enhancements

### Mobile

### Chatter

### Communities

### Sales

### Data.com

### Work.com

### Service

### Analytics

### Site.com

### Force.com Customization

### Force.com Development

## General Enhancements

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
API Access Change for Connected Apps	✓			
Updates to Browsers	✓			
Improved Help & Training Search Experience	✓			
Attach Larger Files, Up to 25 MB, to Objects	✓			
Receive Incoming Emails of up to 25 MB	✓			
Salesforce Notification Banner	✓			
Improved Previews for Microsoft PowerPoint® (.pptx) Presentations	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Orders Included in Data Storage Limits	✓			
Separate Database.com Documentation Discontinued	✓			
Updates to Translated Terminology	✓			
Middle Name and Suffix Fields Available for Person Objects (Beta)				✓
Increased App Limits with Expansion Pack and Unlimited Apps Pack				✓

## Mobile

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>The Salesforce1 App</b>				
Salesforce1 Enhancements	✓			
Salesforce1 Differences from the Full Salesforce Site	✓			
Salesforce1 App Development Overview		✓		
<b>The SalesforceA App</b>				
SalesforceA		✓		
<b>Other Changes</b>				
End of Support for Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry	✓			
Configure Push Notifications for Your Mobile Connected Apps (Generally Available)			✓	
Package Mobile Connected Apps (Generally Available)		✓		

# Chatter

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Files</b>				
Salesforce Files Sync (Generally Available) (available within 24 hours after the Summer '14 release)			✓	
Run File and Content Reports from the File Detail Page	✓			
Other Changes in Files	✓			
<b>Topics</b>				
See Topics People Know about on User Profiles	✓			
Report on Knowledgeable People in Your Organization			✓	
View Records on Topic Detail Pages			✓	
Search Feeds on Topic Detail Pages	✓			
Delete Topics Directly in Salesforce		✓		
<b>Feeds</b>				
Profile-Based Rollout of Chatter (Generally Available)				✓
Add Action Links to Posts (Pilot)				✓
Ask Questions in the Feed with Chatter Questions (Beta)				✓
<b>Other Chatter Changes</b>				
Mobile User Context Switching from Emails	✓			
New Preview Links	✓			
Dismiss Group Announcements	✓			
<b>API Enhancements</b>				
Chatter REST API		✓		
Chatter in Apex (ConnectApi)		✓		

## Communities

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Community Engagement Console		✓		
Communities Analytics			✓	
Dashboards for Community Managers			✓	
Communities Reporting Enhancements			✓	
Reputation			✓	
Configure a Custom Domain for Your Community				✓
Guest User Access to Public Chatter Groups Without Logging In			✓	
Data Loader Now Supports Partner User Logins		✓		
Share URL Moved To The Communities Settings Overlay	✓			
Communities Now Tracked in Login History	✓			
Task Reminders for Partner Users	✓			
Caching Now Available for Unauthenticated Visualforce Pages (available the week of July 21 <sup>st</sup> )	✓			
“Create and Manage Communities” Permission Renamed	✓			
Company Community License Renamed	✓			

## Sales

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>The Salesforce1 App</b>				
Manage Sales on the Go!	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Opportunities and Collaborative Forecasting</b>				
Complete Customization Available for Opportunity Splits		✓		
Edit Custom Fields on Opportunity Splits	✓			
Add Custom Split Types for Opportunity Splits				✓
Create Custom Split Types for Opportunity Splits				✓
Opportunity Splits Appear in Subtabs	✓			
View Opportunity Split Details in Forecasts	✓			
Custom Field Forecasts (Pilot)				✓
Overlay Forecasts (Pilot)				✓
Track Forecasting Changes	✓			
Forecasts 1.0 (Classic) is Retired in Summer '14	✓			
<b>Territory Management</b>				
Territory Management 2.0			✓	
<b>Salesforce for Outlook</b>				
Salesforce Side Panel Available in Contact Manager and Group Editions	✓			
Create More Kinds of Salesforce Records Directly from the Side Panel			✓	
Customize Side Panel Publisher Menus for Different Users			✓	
Users Can Download Salesforce for Outlook without Administrative Support	✓			
Schedule Logouts for Salesforce for Outlook with Connected Apps			✓	
<b>Salesforce Console</b>				
Salesforce Console Enhancements				✓
<b>Activities</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Default Event Action Lets Users Create Events from Any Publisher	✓			
Use Formulas to Track and Validate Activities by Date or by Date and Time			✓	
Report on Sales Reps' Meetings with Customers			✓	
Use Additional Activities Fields to Run More Comprehensive Reports	✓			
Status and Account Fields Make Task Lists More Useful	✓			
Security is Improved in the Multi-User Calendar View	✓			
Custom Reports Based on Activity Relationships Not Fully Supported without Shared Activities			✓	
<b>Price Books</b>				
Customizable Price Book Entries	✓	✓		
<b>Orders</b>				
Generate Orders (Pilot)				✓
<b>Other Changes in Sales</b>				
Territory Field Removed on Accounts for Organizations Using Territory Management 2.0 (Beta)	✓			
Territory Field Value Cleared on Opportunity Records for Organizations Enabling Territory Management 2.0 (Beta)	✓			
Custom Formula Fields on Accounts		✓		
Users Can Associate Records Related to Pipeline with Records Related to Sales in Progress			✓	

## Data.com

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
<a href="#">Enhanced Privacy for Data.com Contacts with Canadian Addresses</a>		✓		

## Work.com

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<a href="#">Skills (Generally Available)</a>			✓	
<a href="#">Give Different Types of Rewards</a>			✓	
<a href="#">Work.com Goal Enhancements</a>	✓			
<a href="#">Added Support for Triggers and Workflow</a>		✓		
<a href="#">Other Changes in Work.com</a>				

## Service

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Case Feed</b>				
<a href="#">Customize Case Feed Layouts in New Ways</a>			✓	
<a href="#">Associate Contacts with Outgoing Email in Case Feed in New Ways</a>	✓			
<a href="#">Make Quick Text Messages Available to Agents in More Case Feed Actions</a>		✓		
<a href="#">Simple Version of the Case Feed Email Action Available for Salesforce1</a>			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Inline Images Now Appear Correctly in Email Replies from Case Feed	✓			
Add the Attachment Component to Case Feed			✓	
Increase Agent Collaboration and Productivity with Case Experts (Pilot)				✓
See Feed Items for Attachments Added from the Case Detail View on page 163	✓			
Exclude Email Threads from Drafts in the Feed		✓		
Customize the Appearance of Emails in the Feed		✓		
New Security Requirement for Addresses Used as From Addresses in Case Feed Email Action	✓			
<b>Case Management</b>				
Receive Larger Emails with On-Demand Email-to-Case	✓			
<b>Community Templates for Self-Service</b>				
Community Templates for Self-Service (Beta)		✓		
Available within 24 hours of Summer '14.				
<b>Entitlement Management</b>				
Add the Milestone Tracker as a Salesforce Console Component		✓		
<b>Knowledge</b>				
Auto-Complete for Article Keyword and Title Searches			✓	
Available within three business days of Summer '14.				
Provide Code Samples with the Click of a Button	✓			
Next-Gen Knowledge Search (Pilot)				✓
Search Synonym Groups More Easily		✓		
Search Suggested Queries Resource in REST API (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Knowledge One Search Page Generally Available			✓	
<b>Live Agent</b>				
Transfer Files During a Chat (Generally Available)	✓			
Transfer Chats to a Chat Button Queue		✓		
Create and Share Articles Using the Knowledge One Widget			✓	
Limited Support for Right-to-Left Languages	✓			
Chat Workspace Closes When a Chat Is Transferred to Another Agent	✓			
Live Agent Deployment API: New Methods	✓			
Live Agent REST API: New Visitor Resources		✓		
<b>Open CTI</b>				
Open CTI: New Directory Numbers Method			✓	
<b>Salesforce Console</b>				
Related Lists as Console Components		✓		
Add the Topics List and Milestone Tracker as Salesforce Console Components		✓		
Salesforce Console Integration Toolkit: New Methods			✓	
Saved User Sessions Include Multi-Components		✓		
Add Call Data to an Interaction Log	✓			
Clear Notes from an Interaction Log	✓			
Limited Support for Right-to-Left Languages	✓			
App Launcher Removed from the Navigation Tab	✓			
New Look for Lookup Components	✓			
<b>Service Communities</b>				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Introducing Chatter Questions (Beta)				✓
End of Support for Legacy Answers	✓			
<b>Social Customer Service</b>				
Moderation for Social Customer Service			✓	
Quick Text for Social Customer Service			✓	
Other changes in Social Customer Service	✓			

## Analytics

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Track Forecasting Changes			✓	
Keep Favorite Report Folders In View	✓			
Delete Multiple Reports at Once		✓		

## Site.com

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Rename Site Assets	✓			
Edit Plain Text Files	✓			
Pane Names Replaced with Icons	✓			
Make Rich-Text Area Fields Compatible with Internet Explorer® 11	✓			

# Force.com Customization

## General Administration

### Data

### Business Logic and Process Automation

### Security

### Sharing

### Globalization

### Critical Updates

### Other Changes in Customization

## General Administration

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Custom Permissions (Developer Preview)		✓		
Description Field Added to Login IP Ranges			✓	
Improvements to Setup Search (Beta)			✓	
More Specific Permissions for Managing Users		✓		
Customize Feed-Based Page Layouts in New Ways		✓		
All Custom Objects Classified as Light or Enterprise Objects			✓	
Home Page Components		✓		
Monitor Your Organization's Usage-based Entitlements (Generally Available)		✓		
<b>Actions</b>				
Publisher Enabled for Chatter Off Organizations	✓			
Global Publisher Layouts and Global Actions Have New Locations in Setup		✓		
Changes to Mobile Smart Actions Behavior	✓			

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Default Event Action Lets Users Create Events from Any Publisher	✓			
Default Action Lets Users Ask Questions in Chatter				✓

## Data

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Retain Field History Data (Pilot)				✓

## Business Logic and Process Automation

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Critical Updates</b>				
Governor Limits Enforced on All Flows			✓	
<b>Visual Workflow</b>				
Manipulate Multiple Salesforce Fields and Records at One Time in a Flow (Generally Available)		✓		
Changes to Trigger-Ready Flows		✓		
Cross-Object Field References in Flows		✓		
Send Email from a Flow		✓		
Submit Records for Approval from a Flow (Pilot)				✓
Use an Object-Specific or Global Action in a Flow		✓		
Flow Formulas Can Resolve to Non-Numeric Values		✓		
Date/Time Values in the Cloud Flow Designer Include GMT Offset		✓		
<b>Workflow</b>				

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Workflow Target User Merge Fields for Email Templates (Beta)		✓		
Default Workflow User is Notified When Email Alerts Approach or Exceed Limits	✓			
Flow Triggers Can Pass Previous Record Values into SObject Variables (Pilot)			✓	
Verify Formula References to Custom Fields in Workflow Rule Criteria and Workflow Actions		✓		
Increased Limits for Total Rules		✓		
<b>Approvals</b>				
Expanded Approval History Reports			✓	
Submit Records for Approval from within the Salesforce1 App			✓	
Submit Records for Approval from a Flow (Pilot)				✓

## Security

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Password Changes</b>				
Additional Password History Options: Remember Up to 24 Passwords		✓		
Longer Minimum Password Length Option		✓		
Uppercase and Lowercase Password Complexity Option		✓		
Minimum Password Lifetime Option		✓		
<b>Authentication</b>				
Specify an Authorization Endpoint as a Request Parameter		✓		
Community ID and URL Values Included in OAuth Responses		✓		

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Organization ID Allowed as a Salesforce Identity Provider Custom Attribute		✓		
Identity Provider Logout URL Supported for External Users of a Community		✓		
Get Custom Permissions in the Identity URL Response		✓		
New Conditions for Access To Multiple Identity URLs With One Access Token		✓		
OpenID Connect Discovery Endpoint Added		✓		
Improved Internet Explorer Browser Compatibility for Login Features	✓			
Log in to a Custom Domain Field Suggestions for Communities	✓			
Microsoft Authentication Provider Support		✓		
<b>Identity</b>				
App Launcher Available for More Profiles		✓		
10 Identity Connect Licenses for New Developer Edition Organizations			✓	
<b>Administration</b>				
Force Logout On Session Timeout		✓		
More Session Types Available for User Session Information		✓		
New Fields Available for User Session Information	✓			
Cross-Domain Exchanges Switch to POST Requests		✓		

## Sharing

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
User Sharing Auto-Enabled for All Organizations	✓			
Control Manual Sharing for User Records		✓		
External Organization-Wide Defaults Auto-Enabled for All Organizations		✓		
Asynchronous Parallel Recalculation of Sharing Rules (Generally Available)		✓		

## Globalization

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Language Additions and Changes	✓			
Additional Globalization Changes	✓			

## Critical Updates

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Governor Limits Enforced on All Flows			✓	
Enhanced Session ID Management for Visualforce			✓	

## Other Changes in Customization

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Link to Success Community Site in Force.com App Menu	✓			
Twitter Component Added by Default onto Page Layouts		✓		
Permission Sets and Enhanced Profile User Interface: Users Section Added to System Permissions		✓		
Increased Maximum Length for Long Text and Rich Text Fields (available within 24 hours after the Summer '14 release)		✓		
Increased Maximum Number of Relationship Fields (available within 24 hours after the Summer '14 release)		✓		
Increased Maximum Number of External ID Fields		✓		
Increased Validation for Custom Web Tabs		✓		
Support for Compound Address Fields in the <code>DISTANCE ()</code> Formula Function	✓			
Support for Compound Address Fields in Custom Geolocation Indexes				✓

# Force.com Development

*Sandboxes*

*Change Sets and Deployment*

*Force.com Canvas*

*Developer Console*

*Visualforce*

*Apex Code*

*API*

*ISVforce*

## Sandboxes

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Packaged Connected Apps Copied to Sandboxes		✓		
Match Production Licenses to Sandbox without a Refresh		✓		

## Change Sets and Deployment

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Entitlement Types Available in Change Sets		✓		
Territory Account Access Included in Change Sets		✓		
Change Sets Included in the Deployment Status Page		✓		
Force.com Migration Tool Support for rollbackOnError		✓		

## Force.com Canvas

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<a href="#">entityFields Attribute Added to &lt;apex:canvasApp&gt;</a>		✓		
<a href="#">SDK Object and Field Changes</a>		✓		
<a href="#">Orientation Event for Handling Mobile Device Orientation</a>		✓		
<a href="#">Canvas Apps in a Page Layout or a Mobile Card</a>		✓		
<a href="#">Custom Icon Support in the Salesforce1 Navigation Menu</a>		✓		
<a href="#">Request a Signed Request On Demand</a>		✓		
<a href="#">Signed Request Canvas Apps Can Be User-Approved</a>		✓		
<a href="#">SAML Single Sign-On for Canvas Apps</a>		✓		
<a href="#">Custom App Lifecycle</a>		✓		

## Developer Console

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<a href="#">Search and Edit Files with the Edit Menu</a>		✓		
<a href="#">Find Files By Name</a>		✓		
<a href="#">Speed Up Queries with the Query Plan Tool</a>		✓		
<a href="#">View Color-Coded Logging Expiration Data</a>		✓		

## Visualforce

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
<b>Visualforce Development</b>				
Improvements to Remote Objects (Developer Preview)		✓		
API Versioning for <code>sforce.one</code> Functions		✓		
Deferred Creation of Dynamic Components		✓		
<b>Other Changes in Visualforce</b>				
<code>renderStyle</code> Attribute Added to <code>topics:widget</code>		✓		
<code>&lt;apex:lineSeries&gt;</code> <code>markerFill</code> and <code>fillColor</code> Attributes Default to <code>strokeColor</code>			✓	
Consolidated Inclusion of Salesforce CSS and JavaScript Resources	✓			
Enhanced Session ID Management for Visualforce			✓	

## Apex Code

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Describe Limits Removed		✓		
Script Statement Limits Methods Removed		✓		
Create Price Book Entries in Apex Tests		✓		
Submit More Batch Jobs with Apex Flex Queue (Pilot)				✓
Run Future Methods with Higher Limits (Pilot)				✓
New and Changed Apex Classes		✓		
Chatter in Apex (ConnectApi)		✓		

## API

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Developer Edition Changes		✓		
New and Changed Objects		✓		
<b>APIs</b>				
REST API		✓		
SOAP API		✓		
Chatter REST API		✓		
Bulk API		✓		
Tooling API		✓		
Metadata API		✓		
Salesforce Console API (Integration Toolkit)		✓	✓	
Open CTI API		✓		
Analytics Dashboards API		✓		

## ISVforce

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
New Partner Community				✓
Simplified Package Installer	✓			
Usage Metrics (Generally Available)				✓
Usage Metrics Visualization				✓
License Management App (LMA) Supports Sandbox Installations		✓		
Assign Package Licenses Using the API		✓		
Create Partner Organizations in the Environment Hub				✓

Feature	Visible to users	Enabled for administrators/ developers	Requires administrator setup	Contact salesforce.com to enable
Package Mobile Connected Apps (Generally Available)	✔			

# General Enhancements

General enhancements affect many users.

## ***API Access Change for Connected Apps***

Beginning with the Summer '14 release, all users of approved connected apps must have the “API Enabled” profile permission turned on to allow access to all features.

## ***Updates to Browsers***

We’ve made some changes to the way Salesforce works with browsers.

## ***Improved Help & Training Search Experience***

We’ve improved search in Help & Training to make it easier to find the content you’re looking for.

## ***Attach Larger Files, Up to 25 MB, to Objects***

We’ve increased the size limit for attachments to objects from 5 MB to 25 MB. Collaborate more easily with larger attachments to cases, accounts, orders, and other objects.

## ***Receive Incoming Emails of up to 25 MB***

We’ve increased the size limit for incoming email messages from 10 MB to 25 MB, making it more likely that you’ll receive even long messages with multiple attachments in their entirety.

## ***Salesforce Notification Banner***

The Salesforce Banner is an announcement banner that appears on some pages.

## ***Improved Previews for Microsoft PowerPoint® (.pptx) Presentations***

We’ve enhanced the technology used to preview PowerPoint® files inside the browser. Users now enjoy presentations rendered with noticeably higher quality.

## ***Orders Included in Data Storage Limits***

Orders (but not order products) now count against the data storage limits of your organization.

## ***Separate Database.com Documentation Discontinued***

The Database.com documentation set has been replaced by the standard Salesforce documentation.

## ***Updates to Translated Terminology***

We’ve updated some terminology, including tab and field names for our Dutch, French, Hebrew, Hungarian, Russian, Spanish, and Turkish language users. For each term, we provide the English version and the corresponding previous and new translations.

## ***Middle Name and Suffix Fields Available for Person Objects (Beta)***

We’ve added the `Middle Name` and `Suffix` fields to person objects so that you can better represent the name of a person who’s associated with a record. Using these fields also helps to avoid confusion when two records have the same first and last names.

## ***Increased App Limits with Expansion Pack and Unlimited Apps Pack***

Get Expansion Pack for Professional Edition or Unlimited Apps Pack for Enterprise Edition to add and use more custom apps in your organization.

## API Access Change for Connected Apps

Beginning with the Summer '14 release, all users of approved connected apps must have the “API Enabled” profile permission turned on to allow access to all features.

In Winter '14 we introduced a program that allows specific approved, security-reviewed connected apps from salesforce.com and our partners to integrate with Salesforce using a process that lets the connected app establish an API connection regardless of user profile settings. To ensure your users' access to data is consistent with the permissions you have enabled, these apps will be required to respect user profile permissions for API access starting in Summer '14.

With this change, users who don't have the “API Enabled” profile permission turned on will no longer be able to use the affected connected apps. The list of affected connected apps from salesforce.com includes:

- Salesforce1 downloadable apps for iOS and Android devices
- Salesforce for Outlook
- Connect for Outlook
- Connect for Office

This change affects all Salesforce, Chatter, and Communities users. For the complete list of affected apps and expected changes in app behavior for different types of users, see the [API Access Change for Connected Apps Knowledge article](#).

If you want your users to continue to have access to the affected connected apps, turn on the “API Enabled” permission. You can accomplish this through either a profile update or an appropriate permission set. Keep in mind that this will grant users API access to your organization and its data.

If you decide not to grant access, you should notify end users who do not have the “API Enabled” profile permission that they will not be able to use the affected connected apps once your organization is upgraded to Summer '14.

If you are using an affected connected app developed by a salesforce.com partner or ISV, you should contact the app provider for details on the potential impact. A list of affected partner connected apps is available in the [API Access Change for Connected Apps Knowledge article](#).

Your data is protected by security tools in the application, including org-wide sharing settings, object-level security, and field-level security. This applies regardless of how users are accessing data, whether through the API or an application, to ensure that users don't have improper access to data. For further information on application security settings, see [Securing Data Access](#) in the Salesforce Help.

## Updates to Browsers

We've made some changes to the way Salesforce works with browsers.

While we haven't made any changes to our browser support for the full Salesforce site, we have made improvements to our [browser and device support for the Salesforce1 mobile browser app](#).

## Currently Supported Browsers (full Salesforce site)

Browser	Comments
Microsoft® Internet Explorer® versions 7, 8, 9, 10, and 11	<p>If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.</p> <ul style="list-style-type: none"> <li>• The full Salesforce site is not supported in Internet Explorer on touch-enabled devices for Windows. Use the Salesforce1 mobile browser app instead.</li> <li>• The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.</li> <li>• The Compatibility View feature in Internet Explorer isn't supported.</li> <li>• The Metro version of Internet Explorer 10 isn't supported.</li> <li>• Internet Explorer 6 and 7 aren't supported for login hints for multiple accounts.</li> <li>• Internet Explorer 7 and 8 aren't supported for the Developer Console or the Data Import Wizard.</li> <li>• Internet Explorer 7 isn't supported for Open CTI.</li> <li>• Internet Explorer 7 and 11 aren't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.</li> <li>• Internet Explorer 7 isn't supported for Force.com Canvas.</li> <li>• Internet Explorer 7 isn't supported for Salesforce console features that require more advanced browser performance and recent Web technologies. The console features not available in Internet Explorer 7 include:               <ul style="list-style-type: none"> <li>◇ The Most Recent Tabs component</li> <li>◇ Multiple custom console components on sidebars</li> <li>◇ Multi-monitor components</li> <li>◇ The resizable highlights panel</li> <li>◇ The full-width feed option on feed-based page layouts</li> </ul> </li> <li>• Internet Explorer 7 and 8 aren't supported for Community Templates for Self-Service.</li> <li>• Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.</li> </ul> <p>For configuration recommendations, see “Configuring Internet Explorer” in the Salesforce Help.</p>
Mozilla® Firefox®, most recent stable version	<p>Salesforce.com makes every effort to test and support the most recent version of Firefox.</p> <ul style="list-style-type: none"> <li>• Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service.</li> </ul> <p>For configuration recommendations, see “Configuring Firefox” in the Salesforce Help.</p>
Google Chrome™, most recent stable version	<p>Google Chrome applies updates automatically; salesforce.com makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Chrome isn't supported for the Console tab or the <b>Add Google Doc to Salesforce</b> browser button.</p>

Browser	Comments
Apple® Safari® versions 5.x and 6.x on Mac OS X	<p>There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.</p> <ul style="list-style-type: none"> <li>• Safari isn't supported for the Salesforce console.</li> <li>• Safari isn't supported for Salesforce CRM Call Center built with CTI Toolkit versions below 4.0.</li> </ul>

For more information about our browser policy, see “Supported Browsers” in the Salesforce Help.

## Improved Help & Training Search Experience

We've improved search in Help & Training to make it easier to find the content you're looking for.

The new search experience provides:

- Better results, faster performance
- Federated results of all content types, including video
- The number of results for each category
- Powerful, easy-to-use filters
- Sorting by relevance or date
- Suggested content and frequent searches as you type

To see the updates yourself, go to <http://help.salesforce.com>. Complete our [two-minute survey](#) for a chance to win a gift card or grand prize. See survey for details.

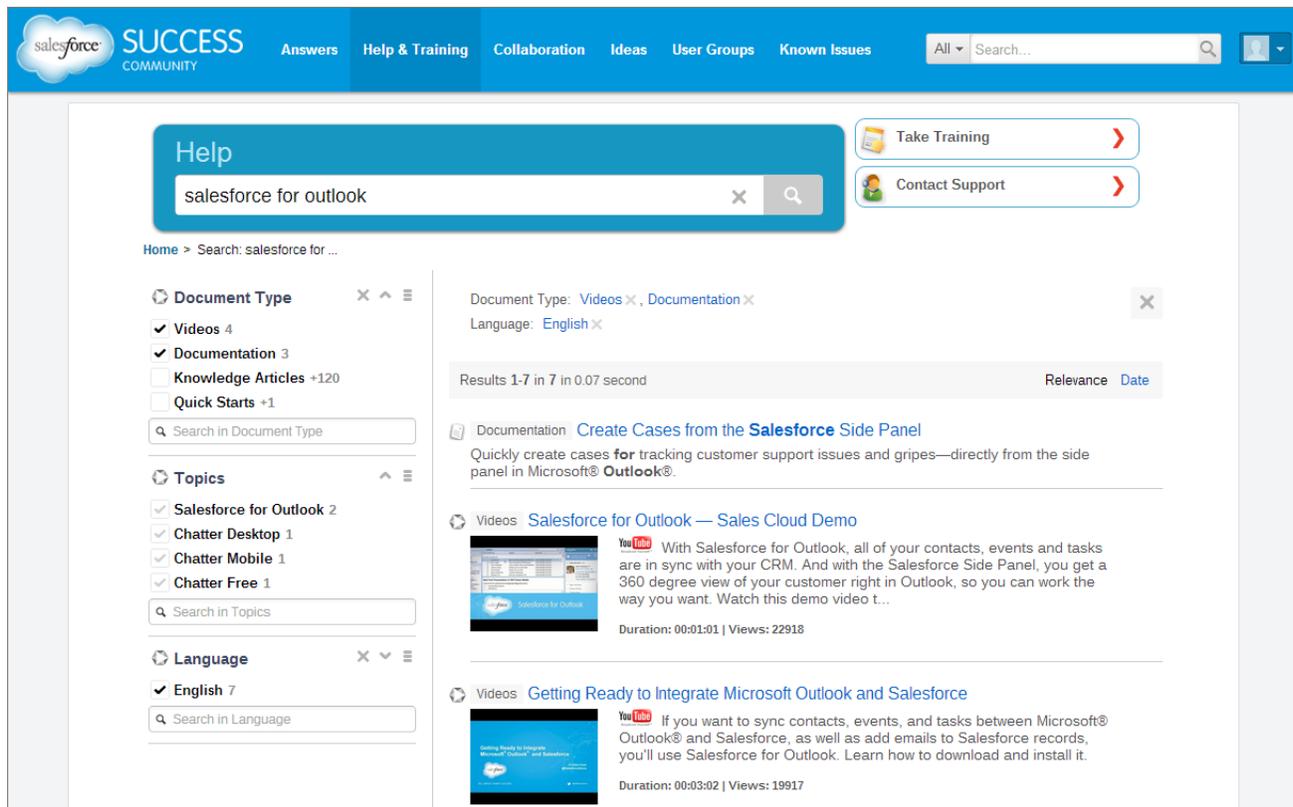
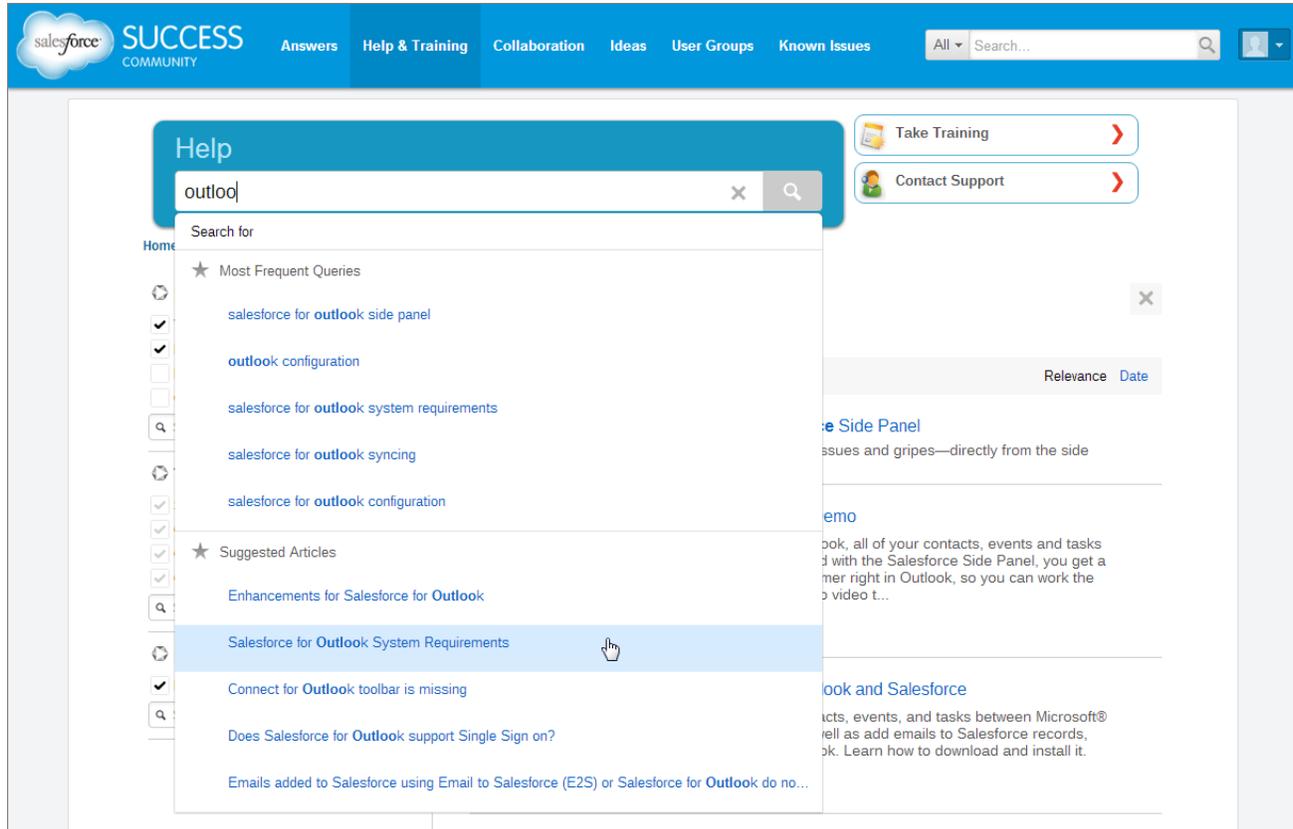


Figure 1: The improved search experience



**Figure 2: Suggested content and frequent searches as you type**

## Attach Larger Files, Up to 25 MB, to Objects

We've increased the size limit for attachments to objects from 5 MB to 25 MB. Collaborate more easily with larger attachments to cases, accounts, orders, and other objects.

Attachment limits in Salesforce Knowledge remain unchanged.

## Receive Incoming Emails of up to 25 MB

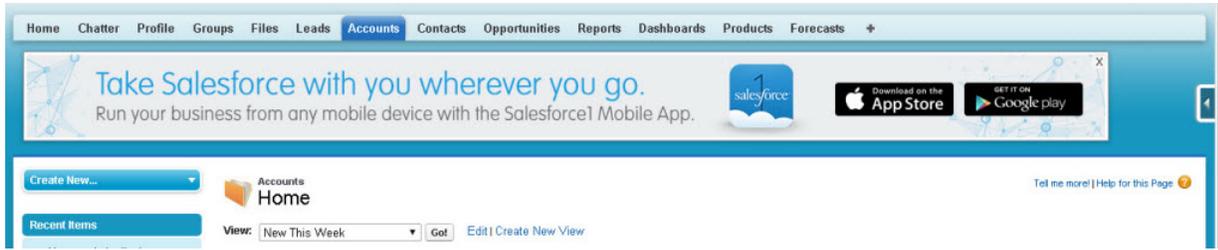
We've increased the size limit for incoming email messages from 10 MB to 25 MB, making it more likely that you'll receive even long messages with multiple attachments in their entirety.

The 25 MB per message limit applies to the entire message: the headers, the body, all attachments, and the encoding. This limit increase applies to all incoming email messages, including those that come in through Email to Salesforce, Email to Chatter, and On-Demand Email-to-Case.

## Salesforce Notification Banner

The Salesforce Banner is an announcement banner that appears on some pages.

In Summer '14, the Salesforce Notification Banner will appear on all pages for accounts, contacts, and dashboards, and in the setup area for your organization.



The Salesforce Banner is not customizable. However, your users can dismiss the banner from all pages by clicking , or you can disable the banner for your entire organization.

### **Disable the Salesforce Notification Banner**

Easily remove the Salesforce Notification Banner for all users in your organization.

## **Disable the Salesforce Notification Banner**

Easily remove the Salesforce Notification Banner for all users in your organization.

Available in: **All Editions**

#### **User Permissions Needed**

To disable the Salesforce Notification Banner: "Customize Application"

The Salesforce Notification Banner is automatically enabled if your organization accepts auto-enabled features in Summer '14, unless Salesforce1 is disabled for your entire organization. You can dismiss the banner from all pages for all users in the organization for the Summer '14 release.

1. From Setup, click **Customize > User Interface**.
2. Deselect **Enable Salesforce Notification Banner**.
3. Click **Save**.

## **Improved Previews for Microsoft PowerPoint® (.pptx) Presentations**

We've enhanced the technology used to preview PowerPoint® files inside the browser. Users now enjoy presentations rendered with noticeably higher quality.

Available in: **All editions**

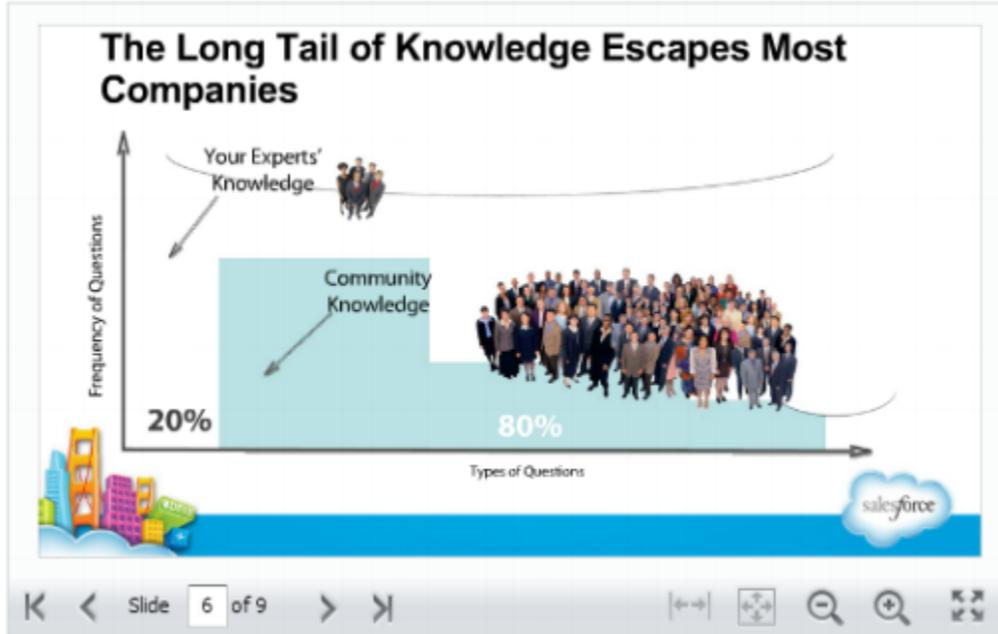


Figure 3: Before



Figure 4: After

## Orders Included in Data Storage Limits

Orders (but not order products) now count against the data storage limits of your organization.

For data storage, Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated either 1 GB or a per-user limit, whichever is greater.

# Separate Database.com Documentation Discontinued

The Database.com documentation set has been replaced by the standard Salesforce documentation.

Starting in Summer '14, Database.com refers to the Salesforce documentation, with a list of features that Database.com supports. You can use this list to identify the subjects in the Salesforce documentation that apply to Database.com. This means that instead of referring to Database.com-specific documentation, you use the Salesforce online help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

The following Database.com developer guides are no longer available. Use the Salesforce equivalent guides along with the Database.com features list instead.

- *Object Reference for Database.com*
- *Database.com Apex Code Developer's Guide*
- *Database.com SOQL and SOSL Reference*
- *Database.com Bulk API Developer's Guide*
- *Database.com Metadata API Developer's Guide*
- *Database.com REST API Developer's Guide*
- *Database.com Streaming API Developer's Guide*
- *Database.com Chatter REST API Developer's Guide*
- *SOAP API Developer's Guide*

This is the list of Database.com features.

## Administration

- Audit Trail
- Company Information
- Delegated Administrator and Login As
- Enhanced Profile Management
- Field-Level Security
- Login History
- Mass Transfers
- New Profile UI
- Permission Sets
- Profiles

**Apex** (Libraries are available only for features supported in Database.com.)

## API

- API Clients
- Bulk API
- Data Loader
- Metadata API
- Chatter REST API
- Web Services API Data Replication
- Web Services API Reads
- Web Services API Writes

## Application Lifecycle Management

- Change Sets

**Chatter**

- Ability to stop following records that you own in Chatter
- At Mentions (API only)
- Chatter Activity and Influence
- Customize Chatter settings
- Feed Tracking
- Feeds
- Files (API only)
- Group Layouts
- Group Trigger and Group Member Triggers
- Groups
- Hashtags and Topics
- Publisher Actions
- Rich Link Previews in Feed
- Triggers for Feed Comments and Feed Items

**Content****Custom Settings****Customer Domains****Data**

- Ability to mass transfer records of custom objects
- Data Loader

**Declarative App Builder and Custom Schema****Custom Objects and Fields**

- Customforce
- Formula Fields
- Rich Text Area
- Roll-up Summary Fields
- Validation Rules

**Developer Tools**

- Force.com IDE

**Divisions****Enhanced Profile User Interface**

- Enabling
- Field Level Security
- Field/Object Perms
- Object and Tab settings – Objects only
- Search
- System Perms
- Viewing and editing app perms

- Viewing and editing Login Hours
- Viewing and editing Login IP Ranges
- Viewing and editing Service Provider Access
- Viewing Profile Lists

**Field Accessibility** (for custom objects)

**Field Dependency Matrix**

**Fileforce**

**Localization and Globalization**

- Multi-Currency
- Timezones

**My Personal Information**

- Change My Password
- Editing personal information
- Granting Login Access (Send Activation Link button)

**Offline**

- Force.com Flex Desktop applications
- Force.com Flex Web applications

**Permission Sets**

- Ability to search permissions
- Viewing, Editing, and Creating

**Profile List Views**

- Creating
- Editing

**Restricting Logins**

- Hours and IP Ranges on Profiles

**Sandbox**

- Developer Sandbox (for an additional fee)
- Full Copy Sandbox (for an additional fee)
- Setup Only Sandbox (for an additional fee)

**Search**

- Personal Tags
- Public Tags

**Security**

- Connected Apps (OAuth)
- Encrypted Custom Fields
- General Security
- Identity Feature
- Inbound Single Sign-On

- Password and Login Policies
- Retrieving forgotten passwords

### **Single Sign-On**

#### **Sharing**

- Apex Managed Sharing
- Criteria Based Sharing Rules
- High Volume Portal User
- Ownership Based Sharing Rules
- Public Groups
- Queues
- Role Hierarchy
- Sharing Model and Manual Sharing

#### **Topics**

- Topic and TopicAssignment Triggers

#### **User Setup**

- Creating and editing Personal and Public Groups
- Send Activation Link

#### **Users**

- Expiring Passwords
- Manage Users
- Managing Roles
- Monitoring User Events (logins and training)
- Resetting Passwords
- Role Fields
- Role List page
- Set Up Password Expiration
- Setting Login Restrictions

#### **Viewing the Public Group Related List**

#### **Weekly Export**

#### **Workflow**

- Outbound messages (as both immediate and time-dependent actions)
- Time-Based Workflow (Workflow Queue)
- Workflow Field Updates and Outbound Messages
- Workflow rules

## **Updates to Translated Terminology**

We've updated some terminology, including tab and field names for our Dutch, French, Hebrew, Hungarian, Russian, Spanish, and Turkish language users. For each term, we provide the English version and the corresponding previous and new translations.

You can find the complete list of term changes in knowledge article number [000193875](https://help.salesforce.com/apex/HTViewSolution?urlname=Summer-14-Updates-to-Translated-Terminology&language=en_US) (URL: [https://help.salesforce.com/apex/HTViewSolution?urlname=Summer-14-Updates-to-Translated-Terminology&language=en\\_US](https://help.salesforce.com/apex/HTViewSolution?urlname=Summer-14-Updates-to-Translated-Terminology&language=en_US)) on the salesforce.com Customer Support site.

These terminology changes are available to all organizations. To keep your current tab and field labels, system administrators can change the name back using our rename tabs and labels functionality. For more information, see “Renaming Tab and Field Labels” and “Considerations for Renaming Tab and Field Labels” in the Salesforce Help or contact Customer Support.

For more information about supported languages, see “What languages does Salesforce support?” in the Salesforce Help.

## Middle Name and Suffix Fields Available for Person Objects (Beta)

We’ve added the `Middle Name` and `Suffix` fields to person objects so that you can better represent the name of a person who’s associated with a record. Using these fields also helps to avoid confusion when two records have the same first and last names.

Available in: <b>All Editions</b>
-----------------------------------

User Permissions Needed	
To show the <code>Middle Name</code> and <code>Suffix</code> fields:	“Customize Application”



### Note:

This release contains a beta version of the `Middle Name` and `Suffix` fields that has known limitations.

The `Middle Name` and `Suffix` fields are available for the following person objects: `Contact`, `Lead`, `Person Account`, and `User`.

To show these new fields, you need to do a few things.

1. Contact salesforce.com Customer Support to enable the new fields.
2. Click **Setup** > **Customize** > **User Interface**.
3. In the Name Settings section, select `Enable Middle Names for Person Names` and `Enable Name Suffixes for Person Names`.
4. Click **Save**.

The values of the `Middle Name` and `Suffix` fields appear in most places where a person’s full name is displayed with the following exceptions.

- Activities, including new events, new tasks, and shared activity lookup search results
- Calendar, including meeting invitations and the Scheduled Meetings section on the Home tab
- Campaigns, including Campaign Member lists
- Chatter
- Cloud Scheduler
- Data.com records
- Forecasts, including the Collaborative Forecasting page
- Opportunities, including opportunity stage history, the Opportunity Sharing Detail page, and the Opportunity Split Edit page
- Price Books, including price book history

- Recycle Bin
- Search results for users

## Increased App Limits with Expansion Pack and Unlimited Apps Pack

Get Expansion Pack for Professional Edition or Unlimited Apps Pack for Enterprise Edition to add and use more custom apps in your organization.

Available in: **Professional** and **Enterprise** Editions

### Expansion Pack Available for Professional Edition

You can purchase Expansion Pack units for your Professional Edition organization to increase app, tab, and object limits. Each Expansion Pack unit corresponds to a user license in your organization.

The following table shows the limits that are upgraded by Expansion Pack.

Feature	Professional Edition	Professional Edition + Expansion Pack
Custom Apps	5	15
Custom Tabs	10	25
Custom Objects	50	200

### Unlimited Apps Pack Available for Enterprise Edition

You can purchase Unlimited Apps Pack units for your Enterprise Edition organization to increase app, tab, and object limits, as well as the maximum number of API calls and data storage capacity. Each Unlimited Apps Pack unit corresponds to a user license in your organization.

The following table shows the limits that are upgraded by Unlimited Apps Pack.

Feature	Enterprise Edition	Enterprise Edition + Unlimited Apps Pack
Custom Apps	10	Unlimited (9,999)
Custom Tabs	25	Unlimited (9,999)
Custom Objects	200	2,000
API Calls	Depends on the license type. See the Salesforce Help.	Current limit + 4,000 calls
Data Storage	20 MB per user or 1 GB per organization, whichever is greater	120 MB per user or 1 GB per organization, whichever is greater

### Adding Pack Units

Expansion and Unlimited Apps Pack units are available for Sales Cloud, Service Cloud, Force.com, and Site.com-Only users. An organization can be upgraded only once with Expansion Pack or Unlimited Apps Pack. If your organization needs higher app limits than what the pack provides, we recommend that you upgrade your organization's edition. To add Expansion Pack or Unlimited Apps Pack units, contact your salesforce.com representative.



**Note:** Custom apps, tabs, and objects that are contained in a managed package that's publicly posted on the AppExchange don't count toward the limits for your Salesforce edition.

# Mobile

Not in the office? No worries! Salesforce mobile apps help you stay productive no matter where you are.

## ***Salesforce1***

Users can stay up to date on their most important records, activities, conversations, and dashboards while out of the office.

## ***SalesforceA***

Salesforce administrators can manage users and view information for Salesforce organizations from mobile devices.

## ***End of Support for Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry***

In case you missed the announcement last release, the Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry apps are no longer supported effective Summer '14. This is because the BlackBerry OS platform on which these apps run is nearing the end of its lifecycle and the new BlackBerry 10 platform doesn't support these apps. Both of these apps will remain fully functional until they are officially deprecated.

## ***Configure Push Notifications for Your Salesforce Mobile SDK Connected Apps (Generally Available)***

We've expanded connected app settings to support mobile push notifications. With these mobile app settings, developers of Salesforce Mobile SDK connected apps can configure their users' mobile devices to receive push notifications from Salesforce.

## ***Package Mobile Connected Apps (Generally Available)***

Mobile packaging is now available to all customers for free. Mobile packaging solves the app distribution problem for customers building mobile apps on the Salesforce platform, by providing an easy mechanism for distributing those apps to employees or partners.

# Salesforce1

Users can stay up to date on their most important records, activities, conversations, and dashboards while out of the office.

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

## ***Access the Salesforce1 App***

There are several options for accessing Salesforce1 on mobile devices.

## ***Salesforce1 Differences from the Full Salesforce Site***

The Salesforce1 app doesn't have all of the functionality of the full Salesforce site, and in some cases includes features that aren't available in the full site.

## ***Salesforce1 App Development Overview***

There are several Force.com platform enhancements that support Salesforce1 development.

# Access the Salesforce1 App

There are several options for accessing Salesforce1 on mobile devices.

- Install the Salesforce1 downloadable app on Android™ and Apple® mobile devices. Users can download the app from the App Store or Google Play™.

- Access the Salesforce1 mobile browser app from a supported mobile browser on Android, Apple, and BlackBerry Z10 devices. This option doesn't require anything to be installed.

## Salesforce1 Enhancements

Our latest round of new and improved Salesforce1 features further expands the utility of the downloadable and mobile browser apps, making it even easier to access Salesforce on the go.



**Note:** Use of the Salesforce1 app is supported for all editions (except Database.com Edition) without any additional licenses. The Salesforce data and features that are available in Salesforce1, however, are determined by your organization's Salesforce edition and licenses and by a user's assigned profile and permission sets.

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup Menu in Full Site
<b>New Device and Browser Support</b>				
The Salesforce1 mobile browser app is now supported in BlackBerry® Browser on BlackBerry Z10 mobile devices and in the Good Access™ secure mobile browser. A beta version is available in Internet Explorer on some Windows 8.1 mobile phones.			✓	
<b>Available Data and Navigation Enhancements</b>				
Access Salesforce Knowledge Articles.			✓	
Access Work.com Coaching and Goals.	✓	✓	✓	
Access Work.com Skills.	✓		✓	
Access the Campaign Members related list.	✓	✓	✓	
Switch Between Accounts in Multiple Organizations and Communities		✓ (As of version 6.0)		
Access more of your organization's custom objects from the Salesforce1 navigation menu and in search results.	✓	✓	✓	
Access up to 200 list views for an object.	✓	✓	✓	
Sort list views to locate data more easily.		✓ (As of version 6.0)	✓	
<b>Publisher and Publisher Actions Enhancements</b>				
Use the publisher and publisher actions in Salesforce1 even if Chatter is turned off.		✓ (As of version 6.0)	✓	
<b>Salesforce Communities Enhancements</b>				

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup Menu in Full Site
Access Flexible Pages in Communities. When viewed in Salesforce1, these pages show up as tabs in the community.			✓	
<b>Chatter Enhancements</b>				
Search for information, such as feed posts, comments, hashtag topics, mentions, and files, in the main feed.	✓ (As of version 5.1)	✓ (As of version 5.1)	✓	
View and follow feed entries organized by topic.			✓	
Tap on hashtags (#) in feed posts to navigate to related topics.	✓	✓	✓	
Ask questions and get answers in the feed.			✓	
Integrate Salesforce or third-party systems into the feed using action links (available through a pilot program). An action link is a URL on a post that links to an API, Web page, or file.			✓	
Open Chatter email notification and digest links directly in Salesforce1 when viewing email on mobile devices.	✓	✓	✓	
Edit user profile details.	✓		✓	
Change the user profile picture.		✓ (As of version 5.1)		
See a user's manager, peers, and direct reports.	✓	✓ (As of version 5.2)	✓	
Quickly identify group announcements in feeds by the new flag icon. (In the downloadable apps, this icon displays in the group feed but not the main feed.)	✓	✓	✓	
Access Salesforce Files from the Salesforce1 mobile browser app.	✓ (As of version 5.0)	✓ (As of version 5.0)	✓	
See more details about Salesforce Files directly from Files list views.	✓ (As of version 5.0)	✓ (As of version 5.0)	✓	
Share Salesforce Files, content links, and Google docs in the feed.	✓ (As of version 5.0)	✓ (As of version 5.0)	✓	

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup Menu in Full Site
Share Salesforce Files Externally Via Link	✓ (As of version 5.3)	✓ (As of version 5.3)		
<b>Relationship Management Enhancements</b>				
Call History for Salesforce1 for Android	✓ (As of version 5.3)			✓
<b>Approvals Enhancements</b>				
Submit records for approval.	✓	✓	✓	
<b>Activities Enhancements</b>				
Access Salesforce events from the Salesforce1 navigation menu.	✓ (As of version 5.3)	✓ (As of version 5.3)	✓	
Navigate task lists more easily and receive better feedback when delegating or closing tasks.	✓	✓	✓	
<b>Today Enhancements</b>				
Log mobile calendar events in Salesforce.	✓	✓		
Add new contacts to Salesforce from mobile calendar events.	✓	✓		
Access related account records directly from mobile calendar events.	✓	✓		
Join conference calls more easily with the improved conference call dialer.	✓	✓		
See the day's weather forecast.	✓	✓		
Scan and absorb important details about the day's schedule more easily with the streamlined Today interface.	✓	✓		
<b>Analytics Enhancements</b>				
Drill down to reports from dashboard components.	✓	✓	✓	
Drill down to see the record that report data is coming from.	✓	✓	✓	
Sort data in reports.	✓	✓	✓	
View Visualforce dashboard components in dashboards.	✓	✓	✓	✓
<b>Customer Service Tools Enhancements</b>				
Add a simple version of the Case Feed Email action to Salesforce1.	✓	✓	✓	✓

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup Menu in Full Site
Track cases and respond to Twitter Tweets in real time.	✓ (As of version 5.3)	✓ (As of version 5.2)	✓	
<b>Notifications Enhancements</b>				
Users can now receive notifications if they're assigned to tasks.	✓ (As of version 5.3)	✓ (As of version 5.2)	✓	
Users can decide for themselves which push notification types they want to receive.	✓ (As of version 5.3)	✓ (As of version 5.2)		
<b>Offline Enhancements</b>				
View Salesforce data even when a mobile device is offline.		✓ (As of version 6.0)		✓
<b>Page Layout Enhancements</b>				
Customize the user profile page layout specifically for Salesforce1.	✓		✓	✓
The Twitter component is now automatically added to the Mobile Cards section of the accounts, contacts, and leads page layouts. This applies to all organizations created after Spring '14.	✓	✓	✓	✓
Default custom links on record detail pages are now supported.	✓	✓	✓	
Include canvas apps in Salesforce1 by adding them to the Mobile Cards section on standard or custom object page layouts.	✓	✓	✓	✓

## More Browser and Device Support for the Salesforce1 Mobile Browser App

Giving your users more options for working on the go, we've expanded the number of mobile browser/mobile device pairings in which the Salesforce1 mobile browser app is officially supported.

If the Salesforce1 mobile browser app is enabled for your organization, users are automatically redirected to the mobile browser app when logging in to Salesforce from these environments:

- BlackBerry® Browser on BlackBerry Z10 devices with BlackBerry OS 10.2 or later and BlackBerry Z30 devices with BlackBerry OS 10.2.1.3175 or later. (Salesforce1 isn't supported on BlackBerry Q10 devices.)
- Good Access™ secure mobile browser on Android™ phones with Android 4.2 or later and on Apple® mobile devices with iOS 7 or later.

- Beta version: Microsoft® Internet Explorer® 11 on Nokia™ Lumia™ 1020 and HTC™ 8X phones with Windows® 8.1. (Salesforce1 isn't supported on mobile phones with Windows 8.0 or on Windows tablets.)



**Note:** The Salesforce1 mobile browser app that's available for Windows 8.1 phones is available as a beta version, which is production quality but has known limitations.

## More Salesforce Data Supported

The Salesforce1 app includes more Salesforce data, including: Campaign Members, Salesforce Knowledge articles, and Work.com Coaching, Goals, and Skills. Unless otherwise noted, these objects are supported in all versions of the Salesforce1 app.

### Campaign Members

This related list is now available on Campaigns.

When viewing campaign members in Salesforce1, only the members' Status appears. To see more details about members, tap on a row.

### Salesforce Knowledge Articles

This object is supported in the Salesforce1 mobile browser app only.

The **Articles** item is automatically included in the Recent section of the Salesforce1 navigation menu as part of the Smart Search Items element. Users may need to tap **Show More** to see the item. See "Customize the Salesforce1 Navigation Menu" in the Salesforce Help for information about how the navigation menu is populated.

Users can view recently accessed articles, use search to locate any article, and access articles attached to a case.

When viewing articles, information such as the Chatter feed, the publisher, and related lists is also included.

### Work.com Coaching, Goals, and Skills

**Coaching** is available from the Salesforce1 navigation menu. Users can add new coaching relationships but editing existing relationships isn't available in this release.

**Goals** is available from the Salesforce1 navigation menu and on user records. Users can view details about existing goals but can't add new goals or edit goals.

**Skills** is supported in the Salesforce1 mobile browser app and the Salesforce1 downloadable app for Android devices. User profiles have a User Skills card that makes it easy to see all the skills a person has. You can also drill in further to see endorsements on those skills.

These Work.com objects are automatically included in the Recent section of the Salesforce1 navigation menu as part of the Smart Search Items element. Users may need to tap **Show More** to see the item. See "Customize the Salesforce1 Navigation Menu" in the Salesforce Help for information about populating the navigation menu.

## Switch Between Accounts in Multiple Organizations and Communities

Users of the Salesforce1 downloadable app for iOS can now access their accounts in different organizations and communities without having to log out and re-log in to each account. Users can stay logged into multiple accounts in different organizations, and this saves users time by letting them easily switch to the accounts they need to access.

Users can tap  next to their avatar and name at the top of the navigation menu to access the account drop-down menu. To add a new account, users tap  and they'll be redirected to the familiar Salesforce1 login page to enter their user name and password credentials. Once their user name and password are authenticated, they can open the account drop-down menu to

see and access their accounts. The items your users see in the navigation menu changes based on the selected account. To remove an account from the account drop-down menu, simply log out of that organization.

Users can view and switch between communities and their internal organization. The communities your users see and have access to changes based on the selected account. Members of your communities who have Customer Community, Partner Community, or other supported portal licenses can use the account drop-down menu to access and switch between their communities.

Communities in Salesforce1 work similarly to the full Salesforce site with some minor differences. See [Communities in Salesforce1: Limits and Differences from the Full Salesforce Site](#).

## Access More Custom Objects

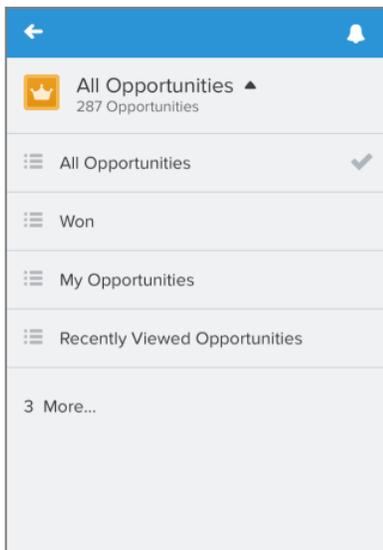
The Salesforce1 app now supports any custom object that has a tab in the full Salesforce site. In previous releases, users could only access custom objects that were included in a Salesforce app.

As long as a custom object is associated with a user-accessible tab, it's included in the Salesforce1 navigation menu and in search results in Salesforce1.

## See More List Views

Salesforce1 users can now see up to 200 of their list views for an object, not just their four most recently accessed lists.

When looking at a specific list view, tap ▼ to display up to 200 of the most recently accessed list views that are available for the object.

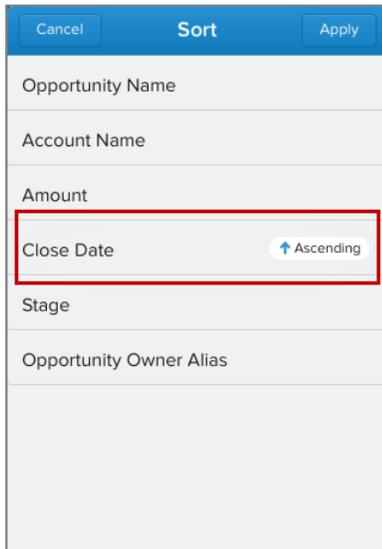


Tap a list view name to open that list. Or, tap ▲ to return to the previous list view.

## Sort List Views

Locate data in list views faster by controlling how information is sorted and displayed. This option is available in the Salesforce1 mobile browser app and the Salesforce1 downloadable app for iOS.

On a list view, tap  to see the sort options. Tap the column name by which to sort. Tap the column name again to alternate between sorting in an ascending and descending order. Tap **Apply** to sort the list view.



## Access Publisher Actions without Chatter Enabled

Publisher actions available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer Editions**

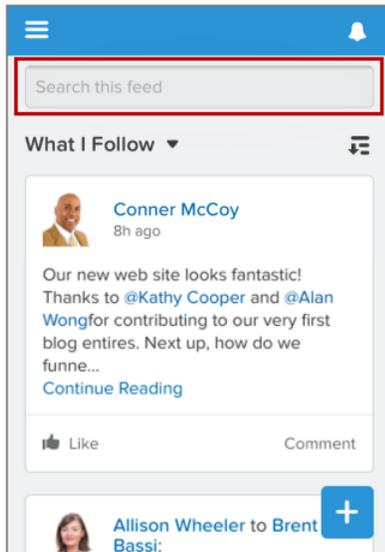
Salesforce1 users can now take advantage of all the robust functionality that the publisher and publisher actions provide even if your organization has decided to turn off Chatter. This enhancement is available in the Salesforce1 mobile browser app and Salesforce1 downloadable app for iOS.

For more information, see [Actions](#) on page 202.

## Search Within a Feed

Now Salesforce1 mobile browser app users can search the main feed to find specific information. This feature has been available in the downloadable apps as of version 5.1.

Search in the feed locates information within the main feed's posts, comments, hashtag topics, mentions, and files. The search box displays at the top of the feed—unlike in the downloadable apps, users don't need to pull down on the feed to reveal the search box.



## View Topics

In the Salesforce1 mobile browser app, users can now view feed posts organized by topic.

The **Topics** item is automatically available from the Recent section of the Salesforce1 navigation menu as part of the Smart Search Items element. (See “Customize the Salesforce1 Navigation Menu” in the Salesforce Help for information about how the navigation menu is populated.) Users may need to tap **Show More** in the navigation menu to see **Topics**. This item displays a list of recent topics.

To access the topics assigned to a particular feed post, tap any topic name below the post.



**Note:** Topics appear in global search results in Salesforce1 only if the user accesses the **Topics** item frequently or pins Topics to search results in the full Salesforce site.

## Ask Questions and Get Answers with Chatter Questions (Beta)

Chatter Questions available in: **Personal, Group, Professional, Developer, Performance, Enterprise** and **Unlimited Editions**.

The Salesforce1 mobile browser app now includes Chatter Questions, so users can ask questions in the feed, in groups, and in records.

To ask a question in Salesforce1, tap , then select the **Question**  action.

After a question is asked, the person who asked the question and moderators can select a best answer—which is prominently displayed in the feed—allowing other users to quickly and easily find the best response to their question.

See [Ask Questions in the Feed with Chatter Questions \(Beta\)](#) on page 95 for more details about Chatter Questions.

## Open Chatter Email Notification or Digest Links in Salesforce1

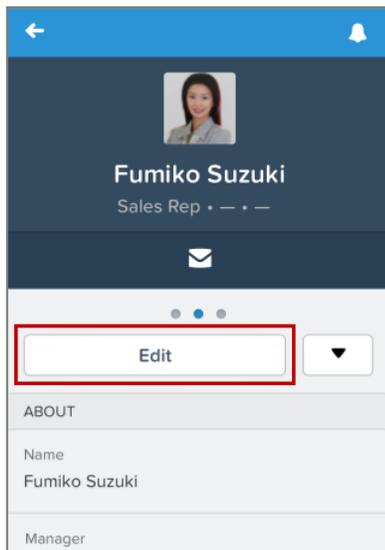
Links in Chatter email notifications or digests have been enhanced so they automatically open in the Salesforce1 app (instead of the full Salesforce site) when the user is working on a mobile device. Links also include data that Salesforce1 uses to correctly switch the user to the correct organization or community. These improvements keep users in the interface that's optimized for working on the go and eliminate the need to manually switch to the correct Community or internal organization.



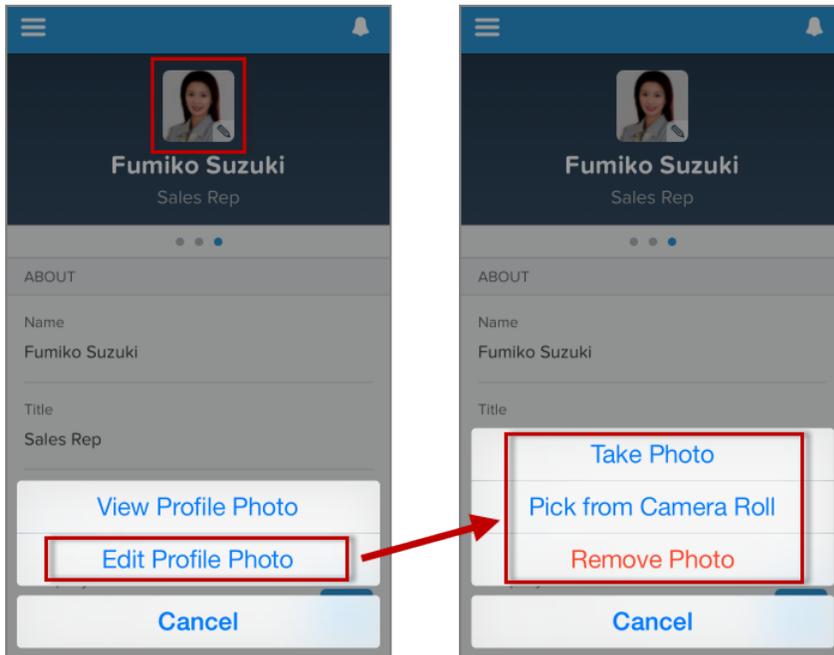
**Note:** Currently, Communities are supported in the Salesforce1 mobile browser app only.

## Edit Profile Details

Users can now update their profile details using the Salesforce1 mobile browser app or the Salesforce1 downloadable app for Android devices. Update profile details such as name, title, and contact information by tapping the **Edit** button on the detail page of user records. Users can edit their own profiles. Administrators can edit the profiles of others if they have the proper permissions.

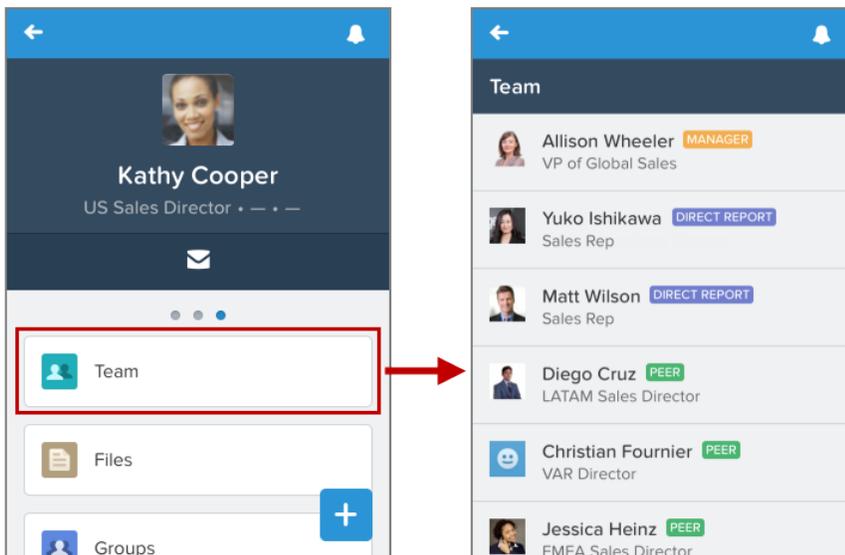


Users can't edit their profile details in the Salesforce1 downloadable app for iOS devices. But this version of Salesforce1 allows users to change their profile photos. When viewing the user record, tap the photo in the highlights area then tap **Edit Profile Photo**.

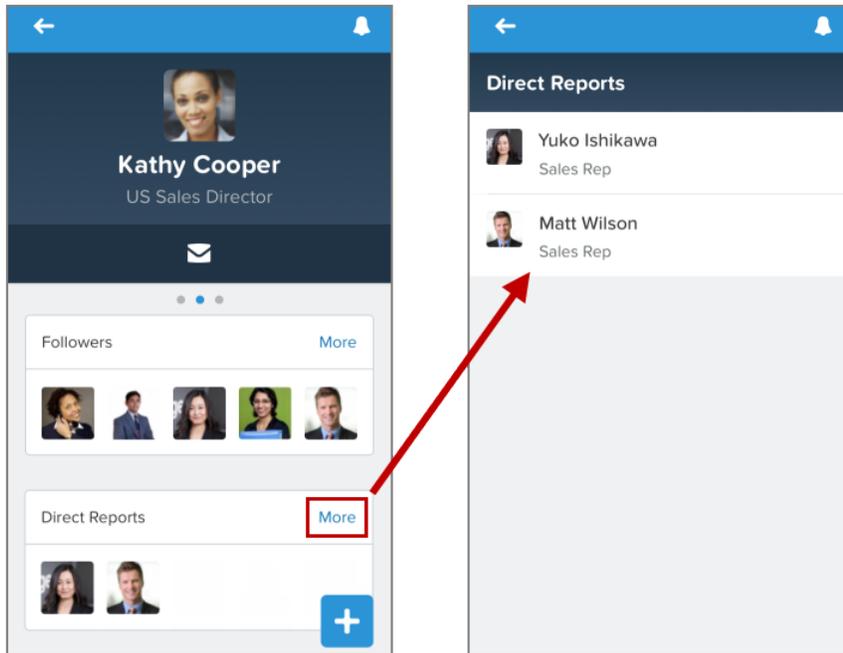


## View Team Members and Managers

Want to quickly see someone’s manager, peers, and direct reports? The new Team related list is now available on user records when viewed in the Salesforce1 mobile browser app or the Salesforce1 downloadable app for Android devices. The information in this related list is pulled from manager hierarchy data, so manager fields for users must be populated to see this feature.



Similarly, the Salesforce1 downloadable app for iOS devices displays the new Direct Reports related list on user records. This related list shows a person’s direct reports only.



## Access Salesforce Files in the Salesforce1 Mobile Browser App

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

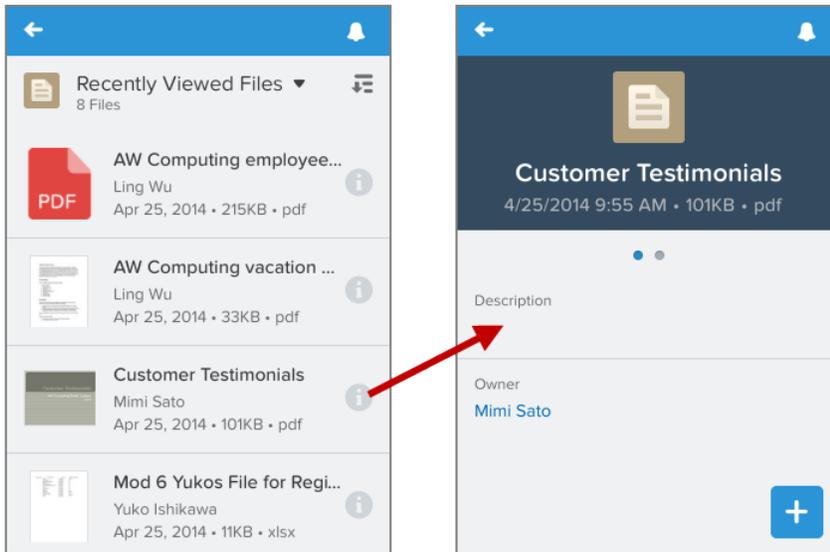
Now users can access, share, and collaborate on their files in the Salesforce1 mobile browser app, as well as the Salesforce1 downloadable apps.

The **Files** item is automatically included in the Recent section of the Salesforce1 navigation menu as part of the Smart Search Items element. Users may need to tap **Show More** to see the item. See “Customize the Salesforce1 Navigation Menu” in the Salesforce Help for information about how the navigation menu is populated.

## View Information about Salesforce Files

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

When browsing Files list views in the Salesforce1 mobile browser app, users now see key details about each file, including the file owner, the date the file was created, file size, file type, and a file preview. To see the record details for a file, tap ⓘ. Tap the file’s name to open the actual file.



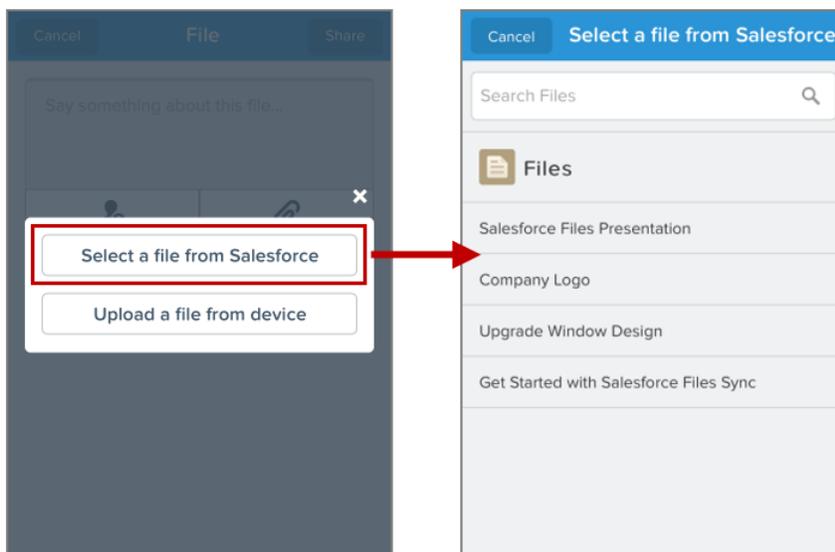
These details have been available in the Salesforce1 downloadable apps as of version 5.0.

## Share Salesforce Files, Content Links, and Google Docs

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

Salesforce1 mobile browser app users can share files from the full Salesforce site, even if the files aren't stored on their mobile devices. This option has been available in the downloadable apps since version 5.0.

Post Salesforce Files, content links, and Google Docs to the feed by tapping  then selecting the **File**  action. Tap **Select a file from Salesforce** then choose an option from the list, including a file from the full site, a content link, or a Google Doc.



## Share Salesforce Files Externally Via Link

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

Users can now share Salesforce Files with anyone, even someone outside their organization, by generating a link to any file. Once users generate the link they can copy and paste it into an email, instant message, text message, or however they decide to share the link. Sharing a file externally via link is only available in the Salesforce1 downloadable apps.

## Call History for Salesforce1 for Android

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

Users can now easily log calls and create contacts with Call History in the Salesforce1 for Android navigation menu. Call History matches up phone numbers users dial with associated contacts in their organization. Administrators can enable or disable Call History for their organization.

## Submit Records for Approval

Approvals are available in: **Enterprise, Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional** Edition

Users can now submit records for approval from the Salesforce1 app. The app displays the **Submit for Approval** button in record detail pages for objects with:

- Active approval processes
- Page layouts that include the **Submit for Approval** button

Note, however, that users can't manually select approvers in Salesforce1. For approval processes that require manual selection, the submitter needs to log in to the full Salesforce site to submit a record for approval.

## Quickly Access Salesforce Events

Sales reps and sales managers who use Salesforce events to track and log activities can now easily access their events from the Salesforce1 navigation menu (instead of having to tap through to activities related lists on different objects).

Events are included in the navigation menu by default. Administrators can customize the location where the **Events** item displays in the navigation menu—from Setup, click **Mobile Administration > Mobile Navigation**.

Selecting **Events** displays the My Events list, which shows the user's current and future Salesforce events. With the exception of multiday events that haven't concluded yet, past events aren't available.

My Events	
Weekly Sales Team Meeting	Apr 28 Location: 8:00 AM Start: 4/28/2014 8:00 AM End: 4/28/2014 9:00 AM
Sync up with Kevin Bailey	Apr 28 Location: 11:00 AM Start: 4/28/2014 11:00 AM End: 4/28/2014 12:00 P...
Lunch, Firefly Insurance	Apr 28 Location: 12:00 PM Start: 4/28/2014 12:00 ... End: 4/28/2014 1:00 PM
Arbuckle Demo	Apr 29 Location: 9:00 AM Start: 4/29/2014 9:00 AM End: 4/29/2014 12:00 P...

Notes about the My Events list:

- The list displays events that are owned by the user, that the user created for him- or herself, and that the user (or a user's groups) are invited to. Events that are available to a user through your organization's role hierarchy settings aren't displayed, nor are proposed events.
- Initially up to 15 events are displayed in the list; to see more events, pull up at the bottom of the list.
- Events in the list are sorted by start time. All-day events are displayed at the top of the list.
- Each event in the list shows either the date and time of the event or "All-Day Event," and up to four information fields. These fields are determined by the Event compact layout that's in effect for the specific event. See the Salesforce Help to learn more about compact layouts.
- When browsing the list, it doesn't automatically update to show new, edited, and deleted events. Pull down on the list to refresh it.
- Users can't create new events from the list. However, the **New Event** publisher action allows users to add new events from a feed or a record view. This action is automatically included in the publisher's global layout for organizations that are new as of Summer '14—see [Default Event Action Lets Users Create Events from Any Publisher](#) on page 203.

Salesforce events aren't currently available in the Today app.

## Navigate Task Lists More Easily

Now when a user saves a task, the Salesforce1 app displays the last viewed task list instead of the saved task record. Salesforce1 also now provides more confirmation messages about changes that users make. Finally, new and edited tasks appear in lists immediately after a user saves—a user no longer needs to tap Refresh.

When a user creates a task while looking at a task list and then saves the task, the Salesforce1 app displays the task list again, with the new task included.

If a task is displayed in a different list as a result of an edit, the Salesforce1 app now displays a message. For example, after a user closes a task while viewing the My Tasks list, a message now confirms that the task appears in a different list (Closed tasks).

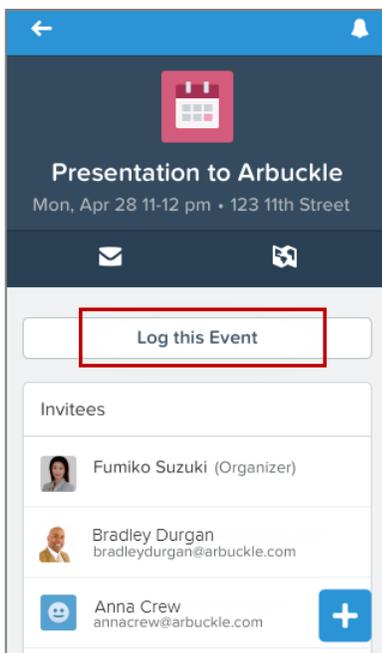
After a user reassigns a task to a user with different permissions, a message indicates that the user no longer has access to the task.

## Log Mobile Calendar Events in Salesforce Using Today

Today displays events that are scheduled on users' mobile calendars. Now Today makes it fast and easy to log these events in Salesforce. This option is especially helpful if your organization requires sales reps to track customer interactions through Salesforce events.

The option to log a mobile calendar event in Salesforce is now available for every event in the Today event list, allowing users to record each meeting as soon as it ends while all the details are still fresh. The process takes just a few seconds because Today automatically fills in all of the required standard fields with data from the mobile calendar. No more typing or cutting-and-pasting required!

From the Today event list, tap the event's card, then tap **Log this Event**. This opens the publisher page for the **New Event** publisher action. (If your organization's global publisher layout includes multiple publisher actions for creating events, Today uses the first action in the layout.)



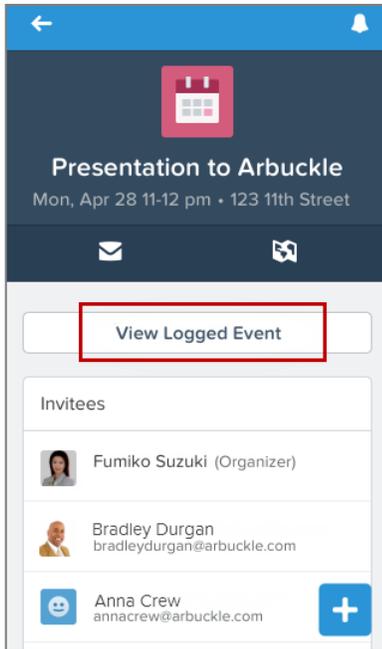
To expedite the process, Today uses data from the mobile calendar event to automatically populate these standard fields in the new Salesforce event: Assigned To, Subject, Start, End, Location, Description, and the All-Day Event checkbox (if applicable). The user can add other information of their own, including notes about the meeting.



### Note:

If the event that is logged is one of a series of recurring events, "Recurring:" is added to the text in the Subject field. Only the current event is logged, not the full series of events.

After the event is logged in Salesforce, the user can access the new Salesforce event record directly from the mobile calendar event in Today.

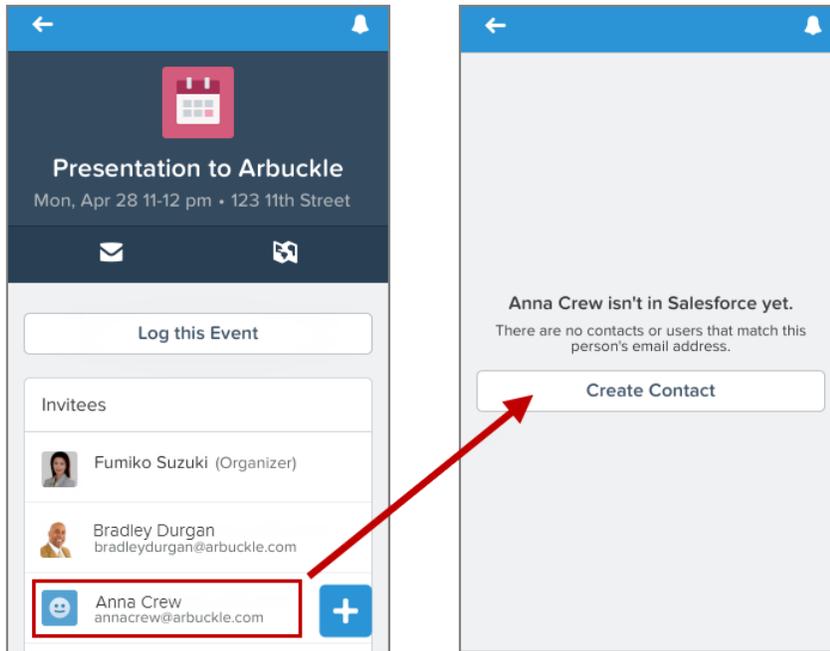


If changes are made to a mobile calendar event after it's been logged in Salesforce, the corresponding Salesforce event is not automatically updated. The user will need to update the event in Salesforce.

## Add Contacts to Salesforce from Today

It's no secret that using Salesforce to gather information about customers helps sales reps build the insights needed to forge stronger relationships and win deals. But often the trick is finding the time to sit down and enter new customer data. Today now makes it easy and fast for sales reps to add new contacts to Salesforce, directly from a meeting's list of invitees.

When viewing an event in Today, the Invitees list includes avatars so users can tell at a glance which of the meeting's participants are already included in Salesforce as contacts, person accounts, or users, and which ones aren't. For any invitee showing the unmatched (👤) avatar, simply tap on the person's name then tap **Create Contact**.



Today automatically fills in the new contact's email address, as well as their first and last name. The user can add other information, including the contact's phone number.



**Note:**

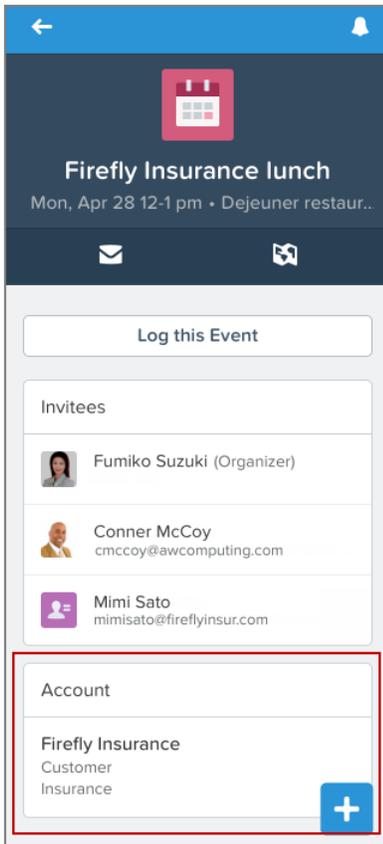
If the invitee's name includes more than two words (for example, John Seymour Smith), Today adds the second name to the `Last Name` field. The user may need to edit this field to correct the last name (as in our example, to change "Seymour" to "Smith").

If the event includes only a first or last name for the invitee, Today doesn't populate either of the name fields.

## See Accounts Related to Events in Today

The CRM data that's directly accessible from events viewed in Today now includes related accounts, so users can quickly review important information like account details, pending opportunities, or open cases in advance of a meeting.

Related accounts are listed in the new `Accounts` card that's been added to the event record view. (Users must have the "Read" user permission on accounts to this card.)



Today uses the Accounts compact layout to determine the account details that are summarized in the Accounts card. (See the [Salesforce Help](#) to learn more about compact layouts.) Tap on an account summary to view the complete account record.

Today determines that an account is related to an event if it's associated with a contact record that matches one of the meeting invitees. Person accounts aren't included in this card.

If a meeting includes contacts from a variety of different accounts, Today lists up to three accounts, picking those that are associated with the largest number of contacts. To see how Today chooses the most relevant related accounts for an event, consider a meeting that includes 10 invitees who are all contacts in Salesforce, representing five different companies:

- Three contacts from PetEdge.com
- Three contacts from Chewy, Inc.
- Two contacts from Pet Food Express
- One contact from Joe's Pet Supply
- One contact from Petopia

The Accounts card for this event will list PetEdge.com, Chewy, Inc., and Pet Food Express because PetEdge.com and Chewy, Inc. have three representatives each and Pet Food Express has two representatives.

## Use Today to Join More Types of Conference Calls, More Quickly

The conference call dialer in Today has been improved so it's quicker and easier to join online meetings. It's now completely automatic to join many Citrix® GoToMeeting® online meetings, and joining calls hosted by other conference providers, including WebEx®, InterCall®, and Microsoft® Lync®, is much simpler. The conference call dialer now functions the same way on Android and iOS devices.

As in the previous release, the conference call dialer is available for an event if the mobile device supports making phone calls and if the event includes a valid conference call dial-in number. But the other information that the dialer needs is much simpler now. The dialer no longer requires that an event include an access code—if one isn't present, the dialer proceeds with calling in to the meeting and allows the user to manually enter the access code. And Today no longer requires specific labels to detect possible dial-in phone numbers or access codes. These are the simplified dialer requirements:

- The conference call invitation details must be included in the `Location` field or the `Notes` section of the event.
- The dialer supports local and international phone numbers that contain between 7 and 15 digits. The phone number can be entered in any format.
- An access code must contain a minimum of seven numbers.

The conference call dialer automates as much of the dial-in process as possible. The level of automation available depends on the conference call provider and the details included in the event.

- It's completely automatic to join a GoToMeeting meeting if the event includes a valid GoToMeeting URL and a single valid dial-in phone number.

It's also automatic to join an online meeting from any provider if the event includes a dial-in number and an access code in this format: `<dial-in number>,,, <access code><other>`, where `<other>` can include additional numbers, # symbols, commas, and asterisks. The numbers must be entered on a single line and there can't be any spaces after the first comma. For example:

```
1234567890,,,1234567#11#
```

In both of these cases, the user taps  in the event, then taps **Call**. The dialer does everything else to connect to the meeting.

- It's slightly less automated to dial in to a GoToMeeting event that includes multiple phone numbers, a GoToMeeting event that doesn't include a meeting URL, or an event hosted by a different conference provider. Before initiating the dial-in process, and depending on the information available in the event, the user may need to choose the dial-in phone number, the access code, or both, from the "Choose a Phone Number" or "Choose an Access Code" lists.

After the user taps **Call** to start the dial-in process, Today automatically dials the selected phone number. When the conference provider prompts for the access code, the user taps **Dial** "`<number>`" on their mobile device and Today automatically enters the selected code.

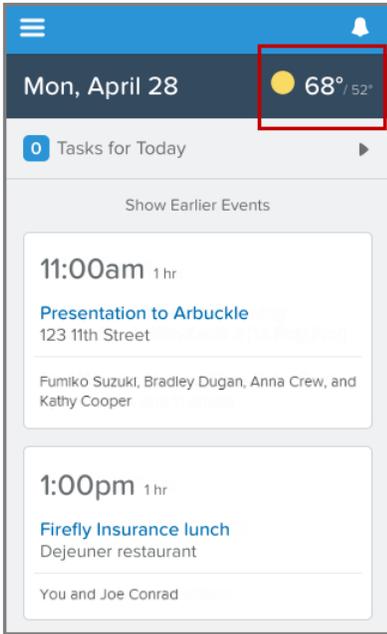


**Note:** If Today isn't certain about what the meeting access code is, or if the meeting doesn't include an access code at all, the "Choose an Access Code" list includes the **Skip this Step** option. If the user selects this option, Today dials the phone number only and the user can manually enter the access code and any other required information.

## Get Weather Information in Today

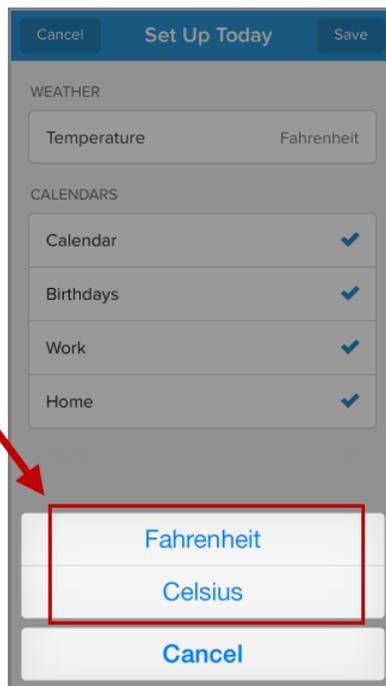
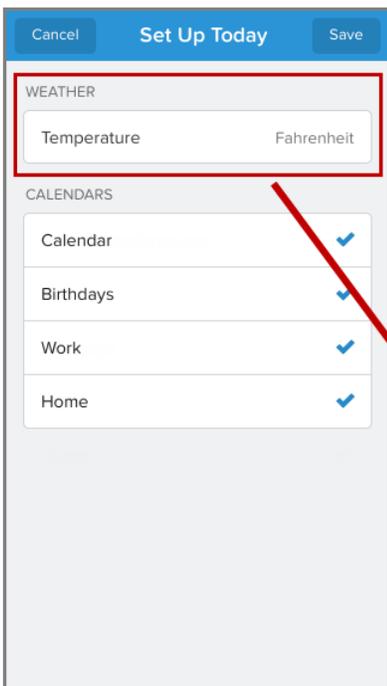
Today now includes weather information. This information helps users start the day right, from making wardrobe decisions to better anticipating commute or travel delays.

Local weather information displays in the highlights area of the Today event list. Users see an icon representing the daytime or nighttime weather forecast, and the forecast high and low temperature for the current location.



To display local weather information, Today requires access to location services on the mobile device. New Today users are prompted to grant location access (along with calendar access) when setting up Today. With Summer '14, existing iOS users will also be prompted to grant location access when they next access Today.

Users can control whether they view temperatures in Celsius or Fahrenheit, from the  icon on the Today event list.



## Today User Interface Improvements

The Today interface has been streamlined, making it easier to scan and absorb important details. Improvements include:

- A smaller highlights area at the top of the page so users can see more information about their actual events.
- The meeting organizer and invitees are now shown together in the Invitees card.
- The second page in the record view was removed because it didn't include any unique information.

## Drill Down from a Dashboard to a Report

Users can now drill right to a report from a dashboard. When viewing a dashboard in the Salesforce1 app, just tap a dashboard component to see the report that's delivering the data to the dashboard.

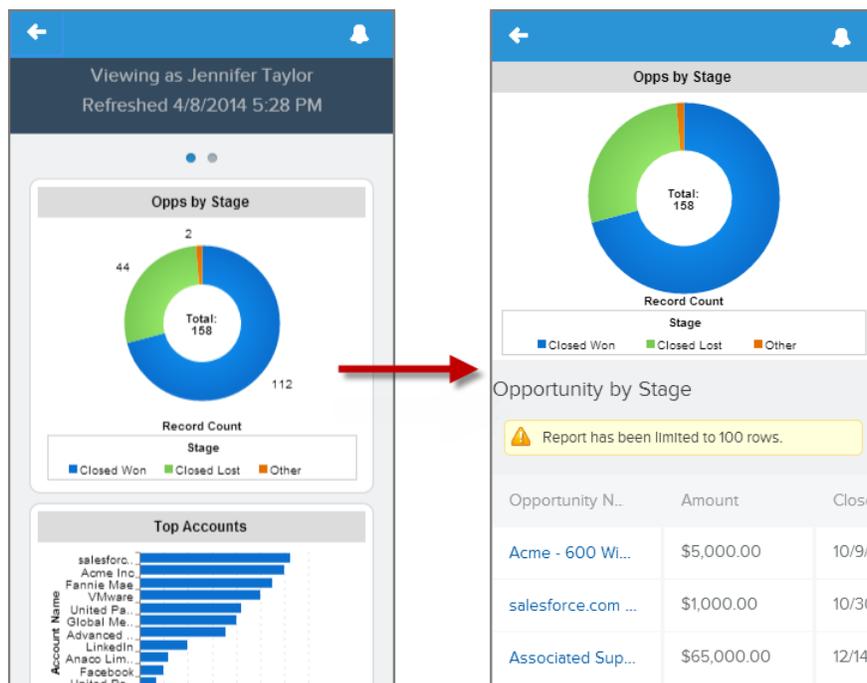
Dashboards available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reports available in: **All** editions except **Database.com**

Reports can be viewed in tabular, summary, or Top N format.

Groupings in summary reports are shown as columns. Swipe right or left to see all the columns.

You can see a maximum of 100 records. To see all records, log in to the full Salesforce site.



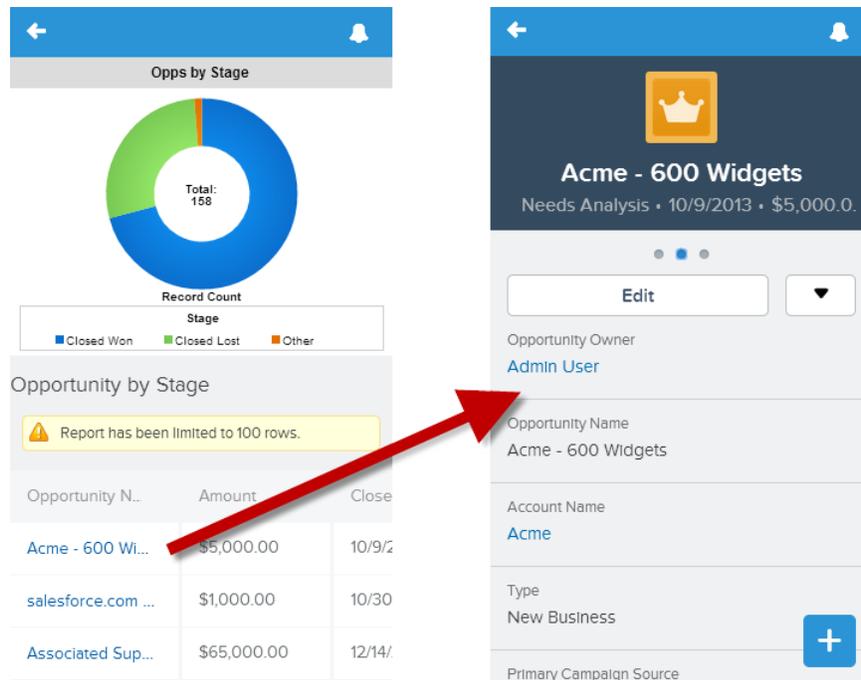
**Important:** When you drill from a dashboard to a report, you may see slightly different data in the report view from what you saw in the dashboard view. That's because the data displayed in a dashboard is from the last dashboard refresh (the date and time of which are shown in the dashboard header), but drilling down to a report actually runs the report, so you are seeing the most current report data.

## Drill Down From a Report to a Record

Tap a row in a report to see the specific record the report data is coming from.

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

Reports available in: **All** editions except **Database.com**



## Sort Data in Reports

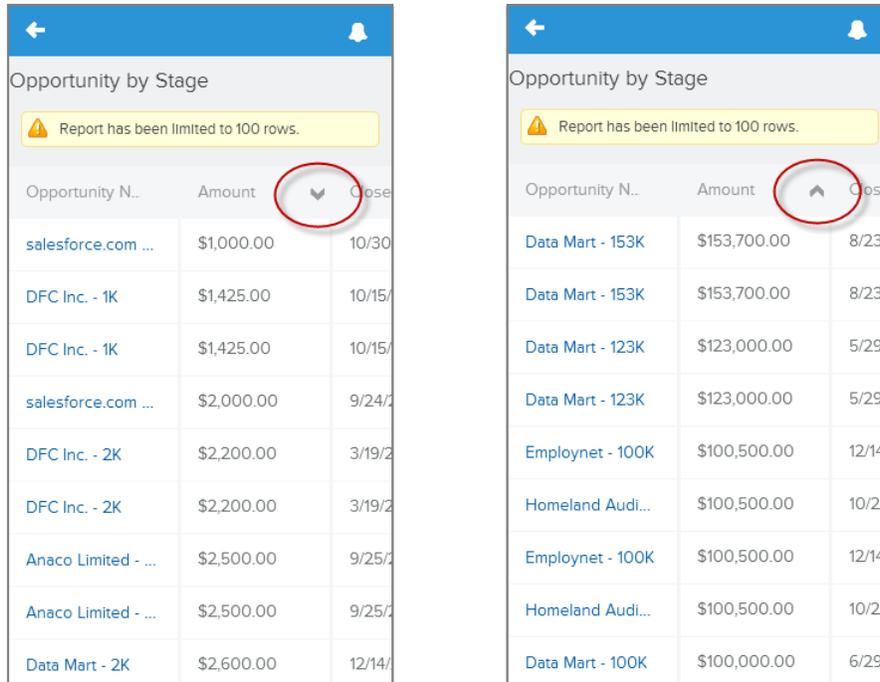
Dashboards available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reports available in: **All** editions except **Database.com**

Focus on the information you want by arranging data in report columns. Tap a column header to sort the report data by that column.

When first viewed, the report is sorted the way it was sorted the last time it ran.

- Tap a column for the first time and it's sorted smallest to largest for numerical values, or A to Z for text.
- Tap again to reverse that sort order.
- Tap a third time to remove sorting and return to the way the report was originally sorted.



## View Visualforce Dashboard Components

Dashboards available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Visualforce available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer** Editions

User Permissions Needed	
To create and edit Visualforce pages:	“Customize Application”

Dashboards in the Salesforce1 app are now able to display Visualforce dashboard components. But as with all Visualforce pages, the Visualforce dashboard component must be enabled for Salesforce1 to display in the app.

To enable a Visualforce dashboard component for Salesforce1:

1. From Setup in the full Salesforce site, click **Develop > Pages**.
2. Click **Edit** for the desired Visualforce page.
3. Select **Available for Salesforce mobile apps** then click **Save**.

For more information, see [Creating Visualforce Dashboard Components](#) in the *Visualforce Developer’s Guide*.

## Add a Simple Version of the Case Feed Email Action to Salesforce1

Case emails available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Add the Send Email action to the publisher to give Salesforce1 users access to a simplified version of the Case Feed Email action. They can then send case-related emails directly from the app, without having to use their mobile device’s mail program.

Messages sent with the Send Email action are automatically associated with the case, included in the case's feed, and added to the Emails related list on the case.

The Send Email action is available only on Cases. You can add it to the publisher on any case page layout.

Some features that are available in the standard Email action in Case Feed aren't available in the Send Email action in Salesforce1.

Feature	Available in Standard Case Feed Email Action	Available in the Send Email Action in Salesforce1
Ability to switch between rich text and plain text	✓	
Template support	✓	
Quick Text support	✓	
Attachments support	✓	
Ability to save messages as drafts	✓	
Inline images support	✓	✓
Standard header fields (To, From, CC, BCC, Subject) available	✓	✓

The process of setting up the Send Email action varies depending on when your organization was created and on the features you have enabled.

- In organizations that had Email-to-Case enabled prior to Summer '14, create a Send Email action from the Case Buttons, Links, and Actions page, and then add the action to the publisher on a case page layout.
- In organizations that are created after or enable Email-to-Case after Summer '14, once Email-to-Case is enabled, a Send Email action is automatically created and added to the list of available actions in the page layout editor. To make the action available to users, add it to the publisher on a case page layout.



**Note:** On layouts where you can include the standard Case Feed Email action—that is, on feed-based case page layouts if your organization has Case Feed Actions and Feed Items enabled—you can add the Send Email action to the publisher and it will appear only in Salesforce1, not in the full Salesforce site. This helps prevent duplication—agents won't see two email-related actions in the publisher on case pages in the full site—and gives agents access to the more fully featured Case Feed Email action in the full site.

For more information on creating and working with publisher actions, see the Salesforce Help.

## Track Cases and Respond to Twitter Tweets in Real Time

Social Customer Service agents can quickly and easily track cases and respond to Twitter Tweets in real time with the Salesforce1 app.

Social Customer Service is available in: **Enterprise, Performance, and Unlimited** Editions

User Permissions Needed	
To send and receive social media posts or messages:	“Social Objects” AND “Social Publisher” AND Case Feed enabled AND Social account
To run Social Customer Service on Salesforce1	Version 5.3 of the Salesforce1 downloadable app for Android devices  Version 5.2 of the Salesforce1 downloadable app for iOS devices  The current release of the Salesforce1 mobile browser app



**Important:** Log a salesforce.com support ticket to enable the Social Objects and Social Publisher permissions. You must have a Social Hub license and sufficient Radian6 managed accounts. If you are switching from the Radian6 for Salesforce package, make note of it in your support ticket.

In Salesforce1, Social Customer Service agents can track cases and respond to tweets in real time.

From Salesforce1, agents can:

- View previous social posts associated with the case.
- Select a message type.

- Select a social account to respond from.
- Enter and send a response.



**Note:** Social Customer Service for Salesforce1 doesn't support the Good Access™ secure mobile browser.

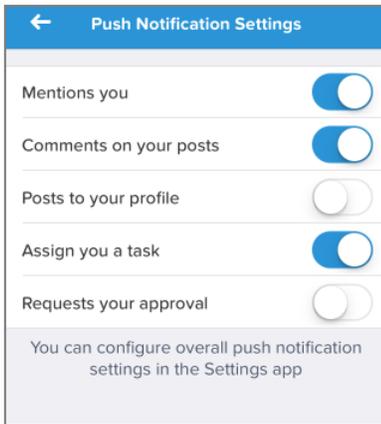
## Receive Notifications About Task Assignments

All versions of the Salesforce1 app can now send notifications to users when they're assigned to tasks. This notification type is available as an in-app notification for the mobile browser app and as both an in-app and push notification for the Android and iOS downloadable apps.

## Decide Which Push Notification Types to Receive

When push notifications are enabled for your organization, Salesforce1 downloadable app users can decide for themselves which push notification types they want to receive.

Users access the push notifications settings from the Salesforce1 navigation menu. At the bottom of the menu, tap **Settings** > **Push Notifications Settings**. To toggle the setting for a push notification type, tap the switch. A blue background on the switch indicates that the notification type is turned on.



The user-configurable push notification types are:

- Mentions you
- Comments on your posts
- Posts to your profile
- Assigns you a task
- Requests your approval

## Work Offline

Salesforce1 downloadable app users can now view much of their Salesforce data when their mobile devices are offline.

Offline access is enabled by default when you install one of the Salesforce1 downloadable apps. You can manage these settings in Setup from **Mobile Administration > Offline**.

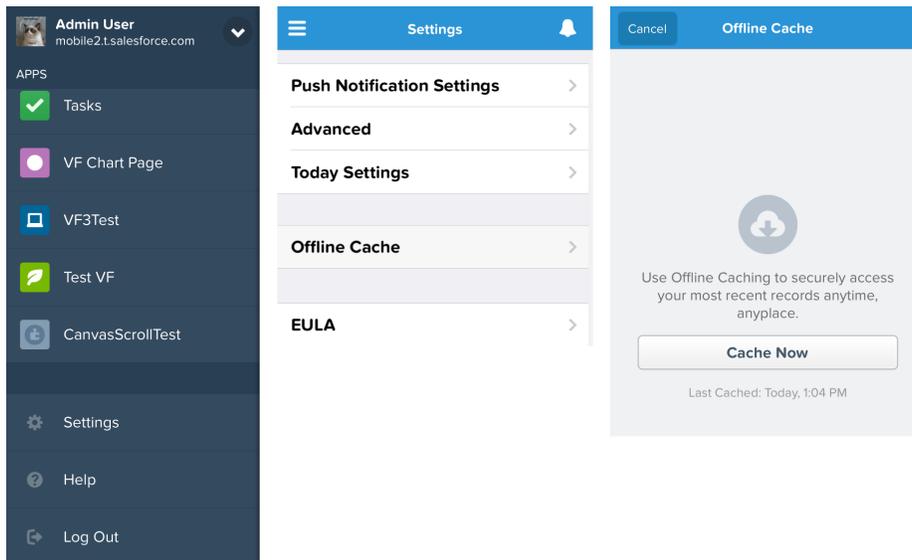
When offline access is enabled, data is downloaded to each user's mobile device based on the objects in the Recent section of the Salesforce1 navigation menu, and on the user's most recently viewed records. Data is encrypted and stored in a secure, persistent cache. This table lists the elements that are available offline.

Salesforce1 Element	Available for Offline Use
Navigation Menu	Yes
Global Search	Previous searches only
Notifications	Previously viewed only
Feeds, Groups, and People	Previously viewed only
Today	Event list is available; individual events are available only if previously viewed
Salesforce Events	No
Recent Objects	Yes (top five)
Other Objects	No
Record Details	Yes (15 most recent records)
Related Records	Previously viewed only

Salesforce1 Element	Available for Offline Use
List Views	No
Tasks	Only tasks from the first page of the My Tasks list (up to 10 tasks), and only if the list was previously viewed or after the user syncs
Dashboards	Previously viewed only
Approvals (submit, approve, or reject)	No
Visualforce pages	No
Canvas Apps	No
Flexible Pages	No
Settings	Yes

When users switch to Salesforce1, their data is cached, which refreshes the local data store. Users can manually cache their data and refresh that cache at any time (for example, before entering an area with no service). When a user switches to another app, the user’s data is cached automatically if the existing cache is over one hour old.

Users can view the status of cached data, and can manually cache data, from **Settings > Offline Cache** in the Salesforce1 navigation menu.



**Note:** The cache is saved for two weeks. Users can clear the cache by logging out of the Salesforce1 app.

## Customize the Profile Layout for Salesforce1

Now you can customize the layout of user records for the Salesforce1 mobile browser app and the Salesforce1 downloadable app for Android devices.

Edit the new User Profile Page layout to control the data that appears on user records when viewed in Salesforce1. You can rearrange the order of fields so the most important fields display at the top of the detail page, add custom fields, include Visualforce pages, define which related lists appear on the related information page, and more.

From Setup in the full Salesforce site, click **Customize > Users > Page Layouts**. Then click **Edit** next to the desired layout in the User Profile Page Layouts section.

**User Page Layout** [Help for this Page](#)

This page allows you to create different page layouts to display User data.  
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Page layouts for the user object only include custom fields, custom links, s-controls, and Visualforce pages. Tagging, related lists, custom buttons, and standard field customizations are not available.

**User Page Layouts** [New](#) [Page Layout Assignment](#)

Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	User Layout	<a href="#">Kasey Central</a> , 12/16/2013 11:42 AM	<a href="#">Kasey Central</a> , 3/24/2014 8:53 AM

**User Profile Page Layouts** [New](#) [Page Layout Assignment](#)

Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	User Profile Layout	salesforce.com, inc., 3/18/2014 8:32 AM	<a href="#">Kasey Central</a> , 4/22/2014 3:06 PM

For more information about editing profile layouts, see the “Customizing Page Layouts” topic in the Salesforce Help.

## Salesforce1 Differences from the Full Salesforce Site

The Salesforce1 app doesn’t have all of the functionality of the full Salesforce site, and in some cases includes features that aren’t available in the full site.

For complete details about which Salesforce features are different in Salesforce1, see the Salesforce Help. For features introduced or updated in Summer ‘14, there are differences in these areas:

- [Working with supported Salesforce data](#)
- [Communities](#)
- [Chatter feeds and topics](#)
- [Finding information](#)
- [Events and tasks](#)
- [Today](#)
- [Dashboards and reports](#)
- [Sending emails in Case Feed](#)
- [Chatter Questions](#)

## Differences in Working with Salesforce Data in Salesforce1

### Rich Text Area Fields on Records

- Support for rich text area fields varies by the version of Salesforce1 and the type of device.

Device	Salesforce1 Version	View Rich Text Area Fields	Edit Rich Text Area Fields
Android	Downloadable App	Yes	Yes
	Mobile Browser App		The rich text editor isn't available. But you can manually add HTML tags.
BlackBerry	Mobile Browser App	No	No
iOS	Downloadable App	Yes	No
iOS	Mobile Browser App	Yes	Yes  The rich text editor is available.
Windows 8.1	Mobile Browser App	No	No

### Campaigns

- When viewing the Campaign Members related list, only the status for each member appears. You can, however, tap members to see more details about them.

### Salesforce Knowledge Articles

- Articles are read-only.
- You can't manage or attach articles to cases.
- Articles with file fields are not supported.
- In multiple language organizations, articles can be searched and viewed only in the user's language or the default knowledge base language if the user's language is not a supported knowledge base language.

### Work.com Coaching, Goals, and Skills

In this release, you can't:

- Edit existing coaching relationships.
- View private coaching notes.
- View goal metrics from coaching.
- Set coaching to "inactive".
- Add new goals or edit existing goals.
- Endorse other users' skills.
- Create custom badges.
- See the rewards/badges given or received on user records.
- Offer or request feedback.
- View custom metric fields.
- Create, fill out, or dismiss performance summaries.
- Manage performance summary cycles.

## Differences in Using Communities in Salesforce1

- The new Community Engagement Console isn't available in Salesforce1.

- Reputation isn't supported in Salesforce1. However, if Reputation is enabled and set up in the full site, users do accrue points when using Salesforce1. For example, if the community manager set up a point system in the full site and assigned point values for writing a post and commenting on a post, then users in the community earn points with every post and comment made in Salesforce1. Users can view their points in the full site only though.

## Differences in Using Chatter in Salesforce1

### Feeds

- It's now possible to search the main feed when using the Salesforce1 app. However, searching in feeds on user profiles, records, and public or private groups isn't available.

### Topics

In this release, you can't:

- Edit topic details (name and description)
- Tag favorite topics
- Assign topics to feed posts or records
- View records assigned to a topic
- See these related lists: Related Topics, Related Groups, Knowledgeable on Topics, Recent Files
- See topics in auto-complete options when searching
- Delete topics

### Files

In the Salesforce1 Mobile Browser App:

- High-volume portal users can't access Salesforce Files from the Salesforce1 navigation menu.
- Files shared through accounts, cases, contacts and other objects don't appear in the Recently Viewed Files list view.

## Differences in Finding Information in Salesforce1

While there haven't been any changes to how global search works in the Salesforce1 app, we want to clarify how users can quickly find what they need.

Using global search in Salesforce1, users can find records for:

- Items that administrators add to the Salesforce1 navigation menu.
- Objects that users see in the Recent section of the navigation menu. These can be either:
  - ◇ Your users' Smart Search Items—the objects that users have viewed or worked with recently in the full Salesforce site.
  - ◇ For users who are new to Salesforce and don't yet have a history of recent objects, a default set of objects.

As users work with records in the full Salesforce site, those objects replace the default ones in the Recent section and become the searchable objects in global search in Salesforce1.



**Tip:** It can take up to 15 days for objects users work with to appear in the Recent section. To make objects appear under Recent sooner, they can pin them from the search results screen in the full Salesforce site.

If objects aren't yet available via global search in Salesforce1, users can select them from the navigation menu and then search for records for those objects using the record search box.

## Differences in Tracking Your Activities in Salesforce1

### Events

- If the My Events list contains all-day and time-based events, the order in which events are displayed in the list can be a little mixed up. Ordinarily all-day events are displayed at the top of the list but there can be cases where an all-day event for the next day winds up interspersed with time-based events for the current day.
- Event detail pages don't display the Recurrence or Reminder sections.
- You can't use the Salesforce1 app to add events to Microsoft® Outlook®.

### Tasks

- Group (multi-user) tasks aren't available.

## Issues Using Today

- Today uses the mobile device's time zone setting, while Salesforce events respect the user's Salesforce time zone setting. If there's a difference between these settings when a user logs a mobile calendar event from Today, the Time field in the new Salesforce event record reflects the user's Salesforce time zone and doesn't match the time of the mobile calendar event.
- Because of the way that the Android OS identifies mobile calendar events, if a user accesses Today on an Android device to log a local event in Salesforce, then views the same event in Today on a different Android device or an iOS device, it may look like the event wasn't logged and it isn't possible to access the corresponding Salesforce event from Today. The logged event status and link is correct on the original Android device, however.
- On devices running Android 4.4, weather information is always displayed in Today, even if access to location information is disabled. This is an Android 4.4 issue and not something that Today can control.

## Differences Using Dashboards and Reports in Salesforce1

- Dashboards are read-only.
- Dynamic dashboards let you see data as yourself only.
- Chatter feeds for dashboards aren't available, nor can you post dashboards or components to feeds.
- Filters aren't available.
- When you view a table with groupings, the groupings are displayed as columns.

## Differences Sending Emails in Case Feed using Salesforce1

There are a few differences between the Send Email action in the Salesforce1 app and the standard Email action in Case Feed.

- Users can't switch between the rich text editor and the plain text editor in a Send Email action.
- Templates aren't supported in the Send Email action.
- Quick Text isn't available in the Send Email action.
- The Send Email action doesn't support attachments.
- Users can't save messages as drafts when using the Send Email action.

## Differences Using Chatter Questions in Salesforce1

- Similar questions and knowledge articles don't display in the Salesforce1 app when users ask questions.

## Salesforce1 App Development Overview

There are several Force.com platform enhancements that support Salesforce1 development.

- [Flexible Pages](#)
- [Action Links in the Feed](#)
- [Force.com Canvas](#)
- [API Support](#)

### Flexible Pages

The `flexipage:recentItems` component now supports these objects, based on the specified properties.

- All custom objects
- All standard objects for which both of these conditions are true:
  - ◇ A compact layout is defined for the object.
  - ◇ The object is tracked in the most recently used objects list.

If an object is tracked in the most recently used objects list, either one or both of the `LastViewedDate` or `LastReferencedDate` fields is present.

The `flexipage:filterListCard` component now supports all list views that are associated with standard and custom objects except:

- Activity
- ContentVersion
- Task
- User
- UserProfile

### Action Links in the Feed

Action links are available through a pilot program and only in the Salesforce1 mobile browser app. For information on enabling action links in your organization, contact [salesforce.com](https://salesforce.com).

An action link is a URL on a feed item that targets an API, a Web page, or a file. An action link can also include an HTTP method and OAuth information. Use action links to integrate Salesforce and third-party systems into the feed. For more information, see [Action Links](#) on page 302.

### Force.com Canvas

You can add a canvas app to a page layout for any standard or custom object. For more details, see [Canvas Apps in a Page Layout or a Mobile Card](#) on page 248 and [Add a Canvas App to a Page Layout](#) on page 248.

You can now customize the navigation menu icon for your canvas app. To customize the icon, set the Icon URL entry in the Basic Information section of the connected app settings for your canvas app. For more information, see [Custom Icon Support in the Salesforce1 Navigation Menu](#) on page 249.

## API Support

The Force.com APIs support Salesforce1 development. Unless otherwise noted, these enhancements for Salesforce1 development were made available in API version 31.0.

### SOAP API

New call: `describePrimaryCompactLayouts()`—Retrieves metadata about the primary compact layout for each of the specified object types.

### REST API

New resource: `tabs`—Returns a list of all tabs—including Flexible Page tabs—available to the current user, regardless of whether the user has chosen to hide tabs via the All Tabs (+) tab customization feature.

The Compact Layouts resource has been updated to allow bulk fetching of the primary compact layout for each of a set of objects. Up to 100 objects can be fetched in one query. For example, to get the primary compact layouts for Account, Contact, and a custom object, the request is:

```
/services/data/v31.0/compactLayouts?q=Account,Contact,CustomObj__c
```

### Tooling API

New object: `FlexiPage`. See [Tooling API](#) on page 320.

# SalesforceA

Salesforce administrators can manage users and view information for Salesforce organizations from mobile devices.

Available in: <b>Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To use SalesforceA:	“Manage Users”

## Navigation Menu

The SalesforceA navigation menu provides a quick overview and easy access to all SalesforceA features.

### Access Your User Record from the Home Screen

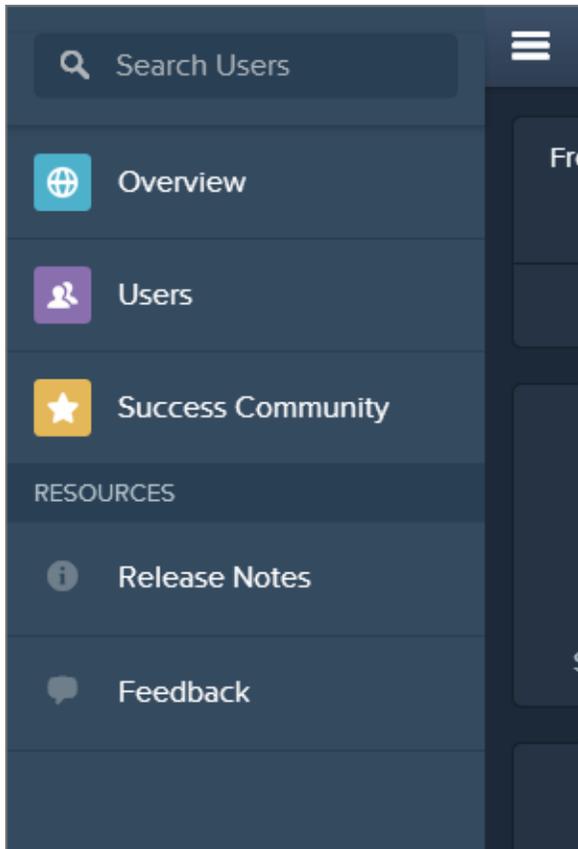
Now it's easier than ever to access your own user record. From the SalesforceA home screen, tap your user name to open the user detail screen for your own user account.

# Navigation Menu

The SalesforceA navigation menu provides a quick overview and easy access to all SalesforceA features.

To access the navigation menu, tap  in the upper-left corner of the screen. The menu contains options to:

- Search for users
- Access the Overview, Users, and Success Community pages
- View the latest release notes in HTML format
- Take a short survey to give feedback on SalesforceA



## Access Your User Record from the Home Screen

Now it's easier than ever to access your own user record. From the SalesforceA home screen, tap your user name to open the user detail screen for your own user account.

## End of Support for Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry

In case you missed the announcement last release, the Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry apps are no longer supported effective Summer '14. This is because the BlackBerry OS platform on which these apps run is nearing the end of its lifecycle and the new BlackBerry 10 platform doesn't support these apps. Both of these apps will remain fully functional until they are officially deprecated.

Users who have downloaded Chatter Mobile for BlackBerry or Salesforce Classic for BlackBerry on their devices can continue to use the apps. However, salesforce.com is no longer providing support in the form of bug fixes or enhancements for any issues that your users might encounter. Chatter Mobile for BlackBerry and Salesforce Classic for BlackBerry continue to be available for download at <https://downloads.salesforce.com/bb>.

We encourage all customers who use these apps to migrate to the Salesforce1 app on any of its supported devices. Summer '14 includes new BlackBerry support for the Salesforce1 mobile browser app—see [More Browser and Device Support for the Salesforce1 Mobile Browser App](#) on page 47. To get started on Salesforce1, see the Salesforce Help.

# Configure Push Notifications for Your Salesforce Mobile SDK Connected Apps (Generally Available)

We've expanded connected app settings to support mobile push notifications. With these mobile app settings, developers of Salesforce Mobile SDK connected apps can configure their users' mobile devices to receive push notifications from Salesforce.

If you provide a native Mobile SDK app for your organization, you can use the new Mobile Push Notifications feature to alert your users to important changes and events in your business. The Mobile Push Notifications feature supports Android and iOS devices and requires additional configuration:

- With the mobile OS provider (Apple or Google)
  - In your Mobile SDK app
  - In Apex, using the new `Messaging.PushNotification` and `Messaging.PushNotificationPayload` classes
- OR

With the Chatter REST API, using the new [push notifications resource](#)

In addition, we've provided a push notification test page. In this page, you can quickly test your push notification setup before the feature goes live in your mobile app.

To reach the test page:

1. In Setup, go to **Create > Apps**.
2. Click the name of your connected app.
3. Click **Send test notification** next to Supported Push Platform. This link appears only if you've configured your connected app to support mobile push notifications.

See the [Salesforce Mobile Push Notifications Implementation Guide](#) (available with the Summer '14 release) for full configuration details. Until then, you can download the PDF file at

[http://res.cloudinary.com/hy4kyit2a/image/upload/salesforce\\_mobile\\_push\\_notifications\\_implementation-2.pdf](http://res.cloudinary.com/hy4kyit2a/image/upload/salesforce_mobile_push_notifications_implementation-2.pdf).



**Note:** Push notifications for connected apps are available only for custom mobile connected apps, such as Mobile SDK apps. This feature does not apply to Salesforce1 or SalesforceA apps.

## Push Notification Limits

The maximum number of push notifications that are allowed for each mobile application associated with your Salesforce organization depends on the type of application.

Maximum number of push notifications allowed for	Limit
Mobile applications provided by Salesforce (for example, Salesforce1)	50,000 notifications per app per day
Mobile applications developed by your organization for internal employee usage	35,000 notifications per app per day
Mobile applications installed from the AppExchange	5,000 notifications per app per day

Only *deliverable* notifications count toward this limit. For example, consider the scenario where a notification is sent to 1,000 employees in your company, but 100 employees haven't installed the mobile application yet. Only the notifications sent to the 900 employees who have installed the mobile application count toward this limit.

Each test push notification that is generated through the Test Push Notification page is limited to a single recipient. Test push notifications count toward an application's daily push notification limit.

You can make up to 10 push notification method calls in each Apex transaction, and send up to 2000 notifications in every method call.

## Check the Push Notification Service Type

Use the `push_service_type` response value in the identity URL response to check if your connected app supports push notifications.

This response value is set to `apple` if the connected app is registered with Apple Push Notification Service (APNS) for iOS push notifications, or `androidGcm` if it's registered with Google Cloud Messaging (GCM) for Android push notifications. The response value type is an array.

## Package Mobile Connected Apps (Generally Available)

Mobile packaging is now available to all customers for free. Mobile packaging solves the app distribution problem for customers building mobile apps on the Salesforce platform, by providing an easy mechanism for distributing those apps to employees or partners.

Connected Apps can be created in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Connected Apps can be installed in: **All** Editions

User Permissions Needed	
To read:	"Customize Application"
To create, update, or delete:	"Customize Application" AND either "Modify All Data" OR "Manage Connected Apps"
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application"
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	"Customize Application" AND "Modify All Data"
To uninstall:	"Download AppExchange Packages"

When creating a mobile connected app, you can specify a set of mobile packaging attributes, such as the platform, version, form factor, and mobile app binary file. If you then include the mobile connected app as a component when creating a package, these attributes are included in the package and migrated when a user moves a package from one organization to another. In addition, after you create and package a mobile connected app, it's instantly available for distribution via a listing in the Private AppExchange.

Here are the steps for creating a mobile connected app.

1. From Setup, click **Create > Apps**.

2. In the Connected Apps section, click **New**.
  3. Enter the relevant information in the Basic Information, API (Enable OAuth), and Web App Settings sections.
  4. Enter the following information in the Mobile App Settings section.
    - a. Select `PIN Protect`, if your app supports PIN protection. This gives an administrator the option of setting the session timeout and PIN length for mobile applications after installing the connected app. PIN protection is automatically supported by the Salesforce Mobile SDK ([https://developer.salesforce.com/page/Mobile\\_SDK](https://developer.salesforce.com/page/Mobile_SDK)). You can also implement it manually by reading the `mobile_policy` object from the user's Identity URL.
    - b. Specify the `App Platform` by choosing iOS or Android from the drop-down list.
    - c. Specify the supported device form factor(s) for the mobile app from the `Restrict to Device Type` drop-down list. The possible values are Phone, Tablet, or Mini-Tablet. If the app is universal (that is, supports all form factors), don't choose any value.
    - d. Enter the `App Version` number of the mobile app.
    - e. Enter the `Minimum OS Version` required for the app.
    - f. Select `Private App` to confirm this app is for internal (non-public) distribution only. This is required because Apple doesn't allow distribution of public mobile apps outside of its app store.
    - g. If the mobile app is private, specify the location of the `Mobile App Binary` file. This is an IPA file for iOS and an APK file for Android.
    - h. For iOS apps only:
      - i. Specify the location of the Application Icon. This is the icon displayed during download and installation of the app on an iOS device.
      - ii. Specify the iOS Bundle Identifier.
-  **Note:** For iOS 7 and higher, you must specify the same bundle identifier that you used for developing the app in XCode. Otherwise, the end user will see two app icons on app installation.
- i. If the mobile connected app is a public app and you haven't uploaded its binary file to Salesforce, enter the `App Binary URL` here.

5. Click **Save**.

You can now publish your app, make further edits, or delete it.



**Note:** If you remove mobile integration from a new version of an existing connected app, mobile integration is no longer included in any version of the connected app. For example, imagine publishing a package containing version 1.0 of your connected app with mobile integration. Then remove mobile integration from the app, repackage it, and publish it as version 1.1. If a customer installs the earlier package with version 1.0 at this point, the version 1.0 connected app will not contain mobile integration.

# Chatter

Chatter helps everyone in your organization stay connected.

## **Files**

Simplify file management for your users with file syncing, versioning, and improved storage.

## **Topics**

Topics help you organize feed posts and records around common themes.

## **Feeds**

Feeds show you posts and comments you and other people make, as well as record updates across your Salesforce organization.

## **Other Changes in Chatter**

Smaller changes can improve your experience with Chatter.

# Files

Simplify file management for your users with file syncing, versioning, and improved storage.

## **Store, Sync, and Share with Salesforce Files Sync (Generally Available)**

Salesforce Files Sync makes file management easier than ever. Your users install a desktop client called Salesforce Files. They can then securely store, sync, and share files between Chatter, their desktops, and mobile devices.

## **Run File and Content Reports from the File Detail Page**

See how many times a file has been downloaded, shared, liked, and commented on.

## **Other Changes in Files**

Other changes enhance file usage and management.

# Store, Sync, and Share with Salesforce Files Sync (Generally Available)

Salesforce Files Sync makes file management easier than ever. Your users install a desktop client called Salesforce Files. They can then securely store, sync, and share files between Chatter, their desktops, and mobile devices.

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



### **Note:**

This feature is available within 24 hours of the Summer '14 release.

If your organization upgrades from a Contact Manager, Group, or Professional Edition to one of the editions that support Salesforce Files Sync, contact [salesforce.com](http://salesforce.com) to enable the feature.

Be aware of these usage limits when using the Salesforce Files Client:

- The maximum amount of data that individual users can sync in their Salesforce Files folder is 10 GB. If the folder reaches this limit, new files won't sync until other files are removed from the folder.
- The maximum file size that can be uploaded using the Salesforce Files folder is 500 MB.

For more information about Salesforce Files Sync limits, refer to the Salesforce Help.

You can work with Salesforce Files Sync using the Chatter REST API. For more information, see [Salesforce Files Sync \(Generally Available\)](#) on page 305.

### **Enable Salesforce Files Sync in Your Organization**

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

#### **Grant Users Access to Salesforce Files Sync**

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

#### **Changes to the Files Tab with Salesforce Files Sync Enabled**

After enabling Salesforce Files Sync, you and your users will notice some changes on the Files tab in Chatter.

#### **Install the Salesforce Files Client**

Users can install the Salesforce Files client so they can sync files between their desktop, Chatter, and mobile devices.

#### **Sync Owned Files Directly from Feed Posts, Comments, File Lists, and File Detail Pages**

Users can sync files they own from the full Salesforce site to the Salesforce Files folder on their computers.

#### **Ways to Share Synced Files**

Share synced files with people and groups on Chatter, or with anyone outside your organization via a generated link. Share them directly from the Salesforce Files folder on your desktop, the Files tab in Chatter, or your mobile device with Salesforce1.

#### **Share Synced Files Directly from the Salesforce Files Client**

Synced files can be shared from inside the Salesforce Files folder.

## **Enable Salesforce Files Sync in Your Organization**

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

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
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<b>User Permissions Needed</b>	
To enable Salesforce Files Sync:	“Customize Application”

1. From Setup, click **Customize > Chatter > Settings**.
2. Click **Edit**.
3. Under File Sync, select **Allow File Sync**.
4. Click **Save**.

Salesforce Files Sync is now enabled for your organization. Next, grant your users access to Salesforce Files Sync.

## Grant Users Access to Salesforce Files Sync

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

User Permissions Needed	
To grant users access to Salesforce Files Sync:	“Customize Application”

### Grant Access to Salesforce Files Sync Using a Permission Set

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

#### Enable Salesforce Files Sync for Profiles

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

## Grant Access to Salesforce Files Sync Using a Permission Set

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

User Permissions Needed	
To create a permission set:	“Customize Application”

1. From Setup, click **Manage Users > Permission Sets**.
2. In the top-left of the Permission Sets list view, click **New**.
3. Fill out the required fields.

#### Label

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

#### API Name

The unique name used by the Force.com API.

#### Description

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

4. Select a user license option. If you plan to assign this permission set to users with both Salesforce and Chatter Only licenses, select **—None—**.
5. Click **Save**.  
The overview page for your new permission set appears.
6. Under System, click **System Permissions**.
7. At the top of the System Permissions list, click **Edit**.
8. Under System Permissions, select **Sync Files**.
9. Click **Save**.

## Enable Salesforce Files Sync for Profiles

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

### User Permissions Needed

To enable Salesforce Files Sync for profiles:	“Customize Application”
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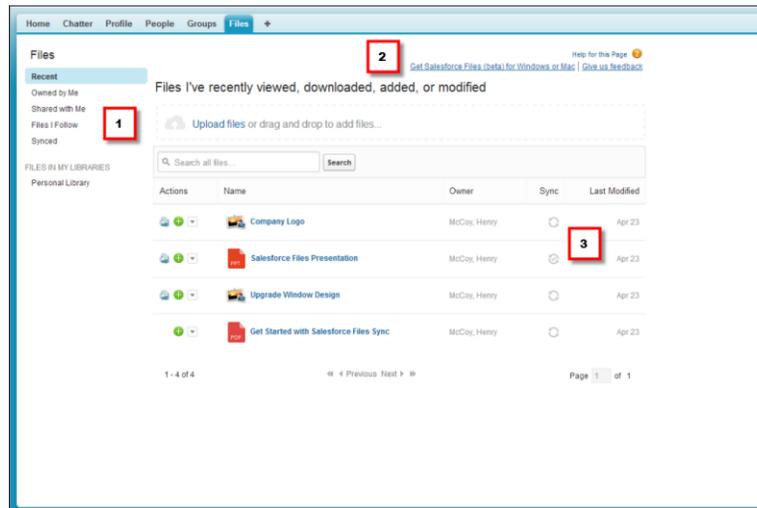
To enable the Salesforce Files Sync permission for a profile:

1. From Setup, click **Manage Users > Profiles**.
2. Click the Profile Name of the profile that you’re granting access to.
3. On the profile detail page, click **Edit**.
4. Under Administrative Permissions, select **Sync Files**.
5. Click **Save**.

## Changes to the Files Tab with Salesforce Files Sync Enabled

After enabling Salesforce Files Sync, you and your users will notice some changes on the Files tab in Chatter.

With Salesforce Files Sync enabled, the Files tab gains three new features.



1. New filter names—Filter the files list by recent, owned, shared, followed, and synced files. The new Synced filter shows the files in your Salesforce Files folder. From the Synced filter, users can search, preview, follow, share, and upload new versions of their synced files.



**Note:** Users who have the “Sync Files” permission see the new filter names. Users without this permission continue to see their existing filter names.

2. Salesforce Files client download—One-click access to download the desktop client.
3. Sync files—Click to sync a file between the full Salesforce site and the Salesforce Files folder on your computer. The icon indicates that a file has already been synced. Hover over and click to stop syncing a file and remove it from your Salesforce Files folder on your computer (the file remains available in Chatter).

## Install the Salesforce Files Client

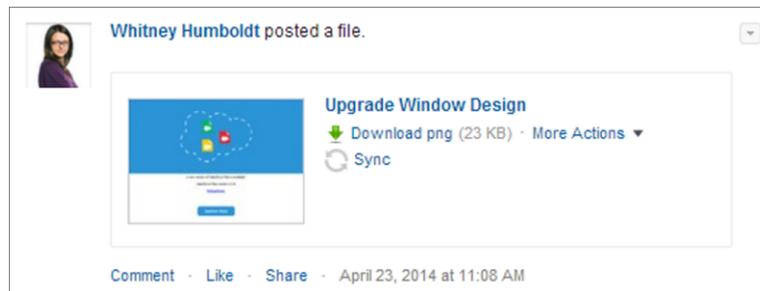
Users can install the Salesforce Files client so they can sync files between their desktop, Chatter, and mobile devices.

The Salesforce Files client is supported on Microsoft® Windows® 7 and Apple® OS X 10.7.

1. Click **Your Name** > **My Settings** > **Desktop Add-Ons** > **Salesforce Files**.
2. Click **Download**.
3. Follow the installation instructions for your operating system.
4. Log in with your Salesforce credentials.

## Sync Owned Files Directly from Feed Posts, Comments, File Lists, and File Detail Pages

Users can sync files they own from the full Salesforce site to the Salesforce Files folder on their computers.



Users can sync files they own directly from feed posts, comments, file lists, and file detail pages.

1. Click  **Sync**.
2. The file syncs.

Users can now access their file in the Salesforce Files folder on their computers and in the Synced filter on the Files tab in Chatter.

## Ways to Share Synced Files

Share synced files with people and groups on Chatter, or with anyone outside your organization via a generated link. Share them directly from the Salesforce Files folder on your desktop, the Files tab in Chatter, or your mobile device with Salesforce1.

If you share a file with a person or group with Collaborator rights, then when collaborators download, edit, and upload a new version of the file, you'll get the latest version automatically synced. When you edit and sync a new version of the file, the people and groups you've shared with will automatically get the latest version on Chatter.

## Share Synced Files Directly from the Salesforce Files Client

Synced files can be shared from inside the Salesforce Files folder.

1. On your desktop, in your Salesforce Files folder, right-click the file you want to share.
2. Choose a menu option under **Salesforce Files**: share with people in your organization, with Chatter groups, or with people outside your organization via link.
3. When prompted, enter the names of the people or groups in your organization and an optional message to share the file with them. If you're sharing the file via link, copy the link.

## Run File and Content Reports from the File Detail Page

See how many times a file has been downloaded, shared, liked, and commented on.

User Permissions Needed	
To run and view a file report	“Run Reports”

Users can run a File and Content Engagement report directly from the file detail page. The File and Content Engagement report has these fields.

Field	Number of times users...
Total Downloads	Downloaded the file.
Posts	Posted the file to a feed. This number doesn't count the number of times the file has been attached to comments on posts.
Post Comments	Commented on file posts in feeds.
Likes	Liked file posts on feeds. This number doesn't count likes received by comments on the file post.
Shares	Shared the file using <b>Share with people</b> and <b>Share with groups</b> . If a user clicks <b>Share</b> on a file post, it's counted as a post and not as a share.
Links	Shared the file using <b>Share via link</b> . If the file is uploaded to a Salesforce CRM Content library, then content deliveries are also counted.

Numbers in the File and Content Engagement report are cumulative for all versions of a file. For example, if there are 2 versions of the file, and version 1 has been downloaded 4 times while version 2 has been downloaded 5 times, then `Total Downloads` reports 9 downloads.

1. From the file detail page, click  **Show file report**.
2. See how users have been engaging with the file in your organization.

## Other Changes in Files

Other changes enhance file usage and management.

### Report on File Usage

See how users are interacting with files, using the new standard report type, File and Content Report. Run these two new standard reports from the Reports tab in Chatter:

- File and Content Downloads
- File and Content Engagement

### Share Content Links and Google Docs on Feeds

If Salesforce CRM Content and Google Docs<sup>®</sup> are enabled in your organization, users can now share content links and Google Docs when posting files to Chatter. After clicking **Select a file from Salesforce**, users can now choose from content links and Google Docs, in addition to Chatter files.

### Changed Who Can See the Content Delivery URL on the Content Delivery Details Page

Previously, the content delivery URL was visible to anyone who had access to the content delivery details page. Now, to prevent unintended access to files in content deliveries, only certain users—those who have access to the content in

the delivery or access to a record associated with the content, or who are the content delivery owner—can view the content delivery URL on the content delivery details page.

## Topics

Topics help you organize feed posts and records around common themes.

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

### **See Topics People Know about on User Profiles**

Quickly identify your peers' professional strengths.

### **Report on Knowledgeable People in Your Organization**

Quickly identify experts on every topic and compare their knowledge levels.

### **View Records on Topic Detail Pages**

See associated records like accounts and leads in the context of a topic's description, feed, and knowledgeable users.

### **Search Feeds on Topic Detail Pages**

The fast, feed-specific search you're using elsewhere in Chatter is now available on topic detail pages.

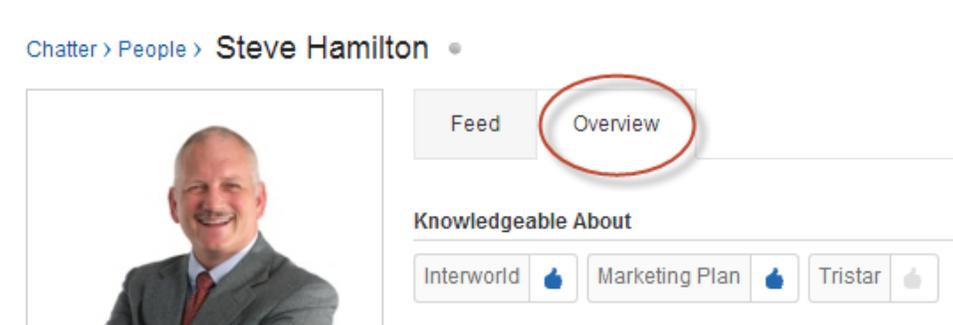
### **Delete Topics Directly in Salesforce**

Previously, you could delete topics only by using the SOAP API, Chatter REST API, or Chatter in Apex. But in Summer '14, you can quickly delete them right on topic detail pages.

## See Topics People Know about on User Profiles

Quickly identify your peers' professional strengths.

The topics people are knowledgeable about now appear on their user profile pages (replacing the Recently Talked About section). Click the Overview tab to see recognized areas of expertise and suggestions for additional endorsements.



**Important:** If Work.com Skills are enabled, they replace knowledgeable topics on profile pages. See [Skills \(Generally Available\)](#). (For Salesforce Communities users, skills replace topics only in the default community.)

## Report on Knowledgeable People in Your Organization

Quickly identify experts on every topic and compare their knowledge levels.

User Permissions Needed	
To create custom report types:	“Manage Custom Report Types”

Ever wonder who the experts are? Knowledgeable User reports quickly highlight and rank them for each topic. Salesforce recalculates knowledge rank daily, basing it on the number of user endorsements and feed actions such as likes and mentions on posts.

To define this custom report type, choose the `Knowledgeable User` primary object, and select from the following fields:

- Network: Name—Name of the community the topic belongs to. This field is available only if Salesforce Communities is enabled for your organization.
- Topic: Name
- User: Full Name
- Rank—Numeric rank of user’s knowledge.



**Note:** In reports, numeric ranks are skipped for Chatter Only or Chatter External users, or users who select Hide Me in Knowledgeable People lists.

## View Records on Topic Detail Pages

See associated records like accounts and leads in the context of a topic's description, feed, and knowledgeable users.

Topics provide a fast way to group records on common themes together, either via list views or—if Chatter is enabled—right on the new Records tab for topic detail pages. When viewing a specific record, you can navigate directly to this tab by clicking any topics listed below the record name.

The screenshot shows a user interface for a topic detail page. At the top, there are two tabs: 'Feed' and 'Records'. The 'Records' tab is selected and circled in red. Below the tabs, there is an 'Object:' dropdown menu set to 'Account'. Underneath, there is a table with columns for 'Action', 'Account Name', and 'Billing State/Province'. The table contains three rows of account data.

Action	Account Name ↑	Billing State/Province
Edit   Del   ✓	Acme Inc.	GA
Edit   Del   +	Arbuckle Laboratories - France	Paris
Edit   Del   ✓	Ecotech - HQ	MA

If you don’t see a Records tab like this for a particular topic, the topic hasn’t been added to any records.

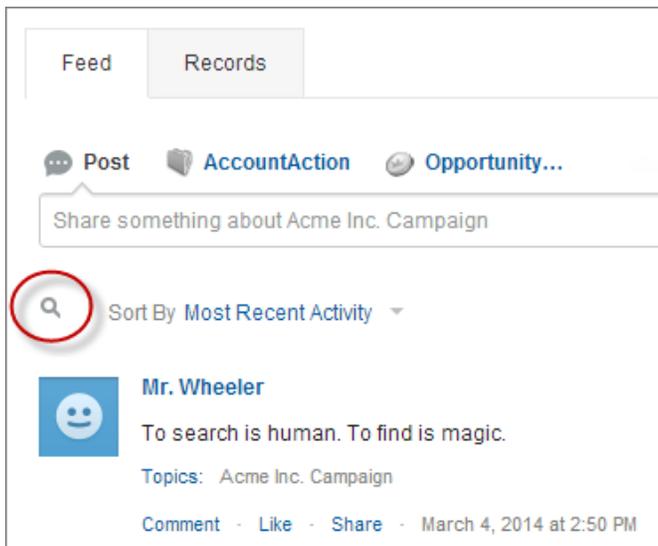


**Tip:** To enable topics for additional objects, in Setup, choose **Customize > Topics > Topics for Objects**.

## Search Feeds on Topic Detail Pages

The fast, feed-specific search you're using elsewhere in Chatter is now available on topic detail pages.

Click  above the feed to find information in its original context.



## Delete Topics Directly in Salesforce

Previously, you could delete topics only by using the SOAP API, Chatter REST API, or Chatter in Apex. But in Summer '14, you can quickly delete them right on topic detail pages.

User Permissions Needed	
To delete topics:	"Delete Topics"

Before deleting topics, carefully consider the following:

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

To delete a topic:

- In the upper-right corner of a topic detail page, click , and choose **Delete**.



**Tip:** Via the same menu, you can now edit details such as topic name and description, or add a topic as a favorite.

## Feeds

Feeds show you posts and comments you and other people make, as well as record updates across your Salesforce organization.

### ***Profile-Based Rollout of Chatter (Generally Available)***

Roll out Chatter for a subset of users instead of all users in your organization.

### ***Add Action Links to Posts (Pilot)***

Use action links to integrate Salesforce and third-party systems into the feed. An action link is a URL on a post that links to an API, a Web page, or a file. Enabling users to work in the feed is the most powerful way to ensure that they adopt and engage in Chatter.

### ***Ask Questions in the Feed with Chatter Questions (Beta)***

Ask questions and get answers in Chatter with Chatter Questions.

## Profile-Based Rollout of Chatter (Generally Available)

Roll out Chatter for a subset of users instead of all users in your organization.

With profile-based rollout of Chatter, you decide who has access to Chatter based on user profiles and permission sets. Once Chatter profile-based rollout is enabled for your organization, your administrator can turn on Chatter for only the users that have been assigned the required user profile or permission sets. All other users in your organization won't have access to Chatter.

With Chatter profile-based rollout, larger organizations can plan a controlled rollout and deploy Chatter in a way that enhances adoption and engagement on a team-by-team basis. Organizations with regulatory constraints have the option to give full or no access to Chatter based on employee roles and profiles.

For example, if you assign a user profile or permission set that excludes Chatter access to a subset of users, these users still have access to Salesforce objects, like accounts, leads, opportunities and so on, but they don't see the record feed and they can't make posts.

For more information about profile-based rollout of Chatter, see "Profile-Based Rollout Overview" in the Salesforce Help.

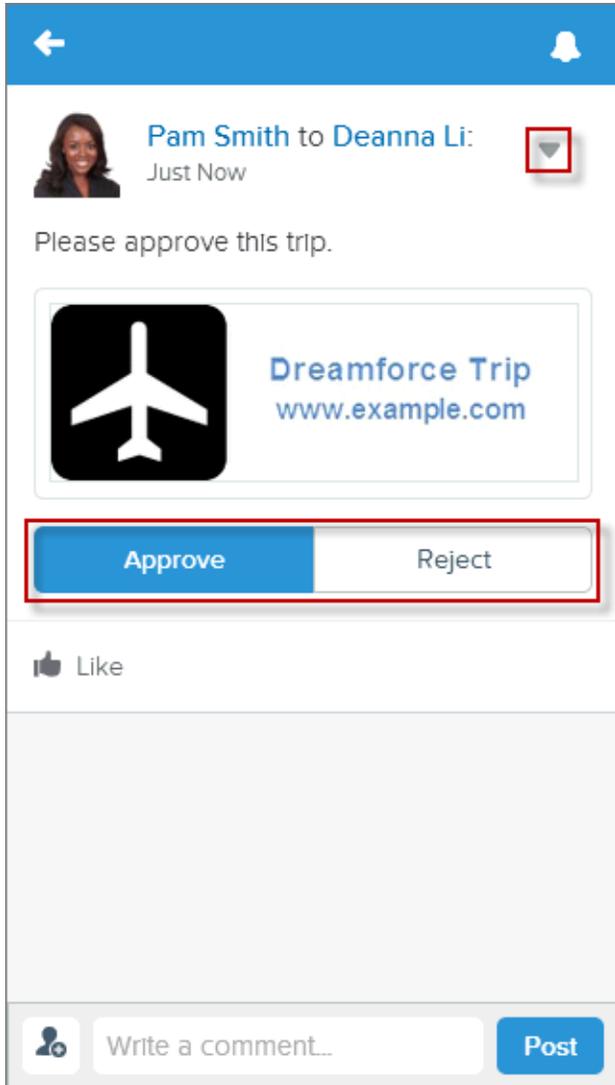
## Add Action Links to Posts (Pilot)

Use action links to integrate Salesforce and third-party systems into the feed. An action link is a URL on a post that links to an API, a Web page, or a file. Enabling users to work in the feed is the most powerful way to ensure that they adopt and engage in Chatter.

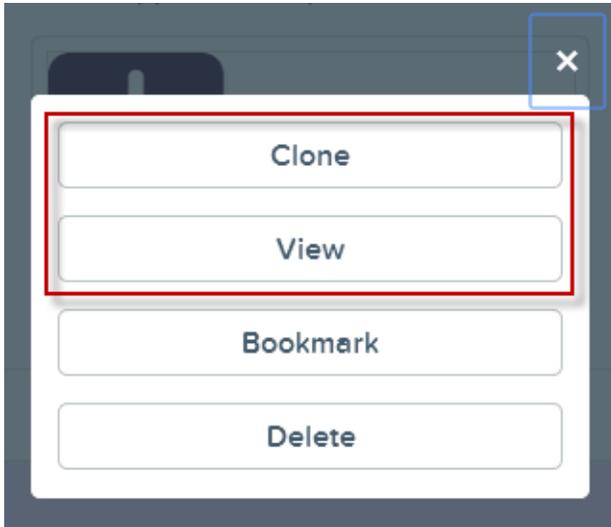


**Note:** Action links are available through a pilot program and only in the Salesforce1 mobile browser app. For information on enabling action links in your organization, contact [salesforce.com](https://salesforce.com).

These action links let a user approve or reject a travel request in the feed:



Define action links in groups. Action links within a group are mutually exclusive. You can associate multiple groups with a post. You can specify whether an action link group displays in the post or in the post's drop-down menu. In this example, "Approve" and "Reject" are in one group and "Clone" and "View" are in another. "Approve" and "Reject" display in the post. "Clone" and "View" display in the drop-down menu.



Action links are user-specific and can be private or public. In this example, Pam makes a post to Deanna's feed asking her to download some instructions and then place an order. Deanna can see the "Order" and "Download" action links in the post in her feed:



Pam can see the post, but she can see only the “Download” action link because she doesn’t have permission to place the order:



During the Summer '14 pilot, use Chatter REST API to define action links and publish a Chatter post that contains action links. For more information, see [Action Links \(Pilot\)](#) on page 302.

## Ask Questions in the Feed with Chatter Questions (Beta)

Ask questions and get answers in Chatter with Chatter Questions.

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



**Note:** This release contains a beta version of Chatter Questions that is production quality but has known limitations. For information on enabling this feature for your organization, contact [salesforce.com](https://salesforce.com).

Chatter Questions allows users to ask questions in their Chatter feed, in groups, and in records. With Chatter Questions, users can quickly view similar questions and articles as they enter their question, without switching context. After a question is asked, the person who asked the question or the question's moderator can select a best answer—which is prominently displayed in the feed—allowing other users to quickly and easily find the best response to their question.

Your users can organize their information with the question title and details about their question. They can ask the question to their followers, to a group, or to a specific person, as they can with other Chatter feed items.

Chatter Desktop doesn't support Chatter Questions.

You can work with Chatter Questions using the Chatter REST API. For more information, see [Chatter Questions \(Beta\)](#) on page 307.

### **Similar Questions**

Your users might ask similar questions. Chatter Questions helps reduce duplicate content in your community by showing similar questions before your users ask their question.

### **Knowledge Deflection with Chatter Questions**

In addition to similar questions, Salesforce Knowledge articles can also hold answers to your customers' questions. With Chatter Questions, you can choose to show relevant articles as users type their question in Chatter.

### **Enable Knowledge Deflection for Chatter Questions**

Show relevant Salesforce Knowledge articles when users ask a question in Chatter.

### **Selecting a Best Answer for a Question in Chatter**

One of the advantages of asking a question in Chatter is that your users can select the best answer for a question. When a question has a best answer, your users don't have to read through all of the answers to the question and can quickly resolve their issue by going directly to the best answer.

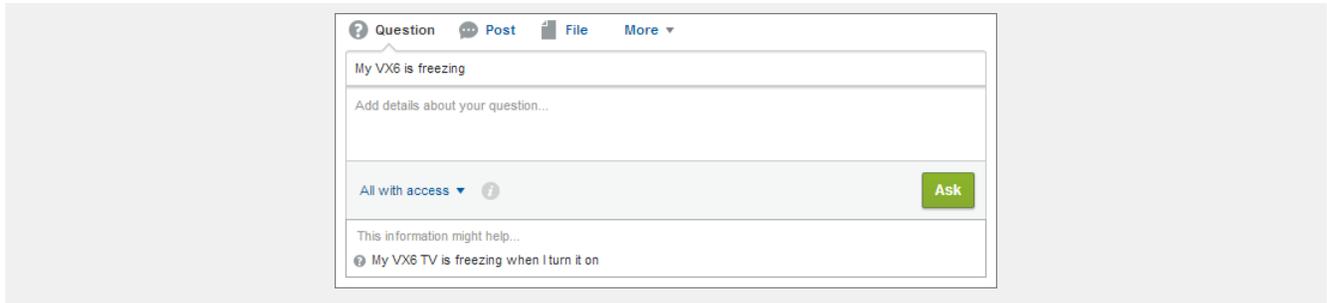
### **Chatter Questions (Beta) FAQ**

Here are some questions and answers about Chatter Questions.

## **Similar Questions**

Your users might ask similar questions. Chatter Questions helps reduce duplicate content in your community by showing similar questions before your users ask their question.

When users type their question and press TAB or ENTER, similar questions appear. The list of similar questions shows the number of answers a question has as well as if the question has an answer selected as the best answer. They can continue to ask their question or click any similar question to quickly get the answers they need.



## Knowledge Deflection with Chatter Questions

In addition to similar questions, Salesforce Knowledge articles can also hold answers to your customers' questions. With Chatter Questions, you can choose to show relevant articles as users type their question in Chatter.

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

Your users create a lot of content. If someone wants to ask a question in Chatter, there's a good chance that someone in your community might have already answered their question, possibly in a Salesforce Knowledge article. Articles often contain information about specific configurations, errors and workaround solutions to tricky issues. Help your users find these articles quickly by enabling Knowledge Deflection in Chatter Questions. That way, your users don't have to search—the articles simply show up when they ask a question in Chatter!

## Enable Knowledge Deflection for Chatter Questions

Show relevant Salesforce Knowledge articles when users ask a question in Chatter.

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

### User Permissions Needed

To enable Knowledge deflection for Chatter Questions: "Customize Application"

You must have Salesforce Knowledge enabled.

When your users ask a question in Chatter, similar questions appear as they type. You can enable Knowledge Deflection for Chatter Questions so articles appear too.

1. From Setup, click **Customize > Knowledge > Settings**.
2. Select **Suggest helpful articles while creating questions in Chatter** under Chatter Questions: Knowledge Deflection.

## Selecting a Best Answer for a Question in Chatter

One of the advantages of asking a question in Chatter is that your users can select the best answer for a question. When a question has a best answer, your users don't have to read through all of the answers to the question and can quickly resolve their issue by going directly to the best answer.

Your users see the **Select as Best** option to select an answer to a question as the best answer only if they are actually able to select the best answer for the question.



The screenshot shows a Chatter interface. At the top, a user profile picture is followed by the text "Noah Larkin asked a question." Below this is the question: "What is the best monitor for playing video games?" and a brief description: "I was using a Cirrus 27" monitor before, but I want to move to a dual monitor setup. And I want the images to be really sharp. #Monitor #videogames". There are "Topics: Videogames, Monitor" and "Answer · Like · Today at 2:29 PM" below the question. Three answers are listed below, each with a "Select as Best" button circled in red:

- Allison Wheeler**: "I've actually found that dual monitors aren't great for video game play. I find it distracting and hard to use. Quite often the graphics card won't keep up. However, if you're set on using a dual-monitor setup, I recommend the AW-PX16 graphics card and any monitor will do." (Today at 2:32 PM)
- Yuko Ishikawa**: "I have the AW-900a monitor, and I love it!" (Today at 2:35 PM). Includes an image of the "AW-900a" monitor and a "Download png (53 KB) · More Actions" link.
- Conner McCoy**: "I've had a lot of different setups. @Allison Wheeler is right—you'll need a good graphic card. For the monitor, the 29" AW-TX is best for graphics and gaming." (Today at 2:37 PM)

At the bottom of the screenshot is a text input field labeled "Write an answer..."

The person who asked the question and moderators can select the best answer for a question. Moderators can be the Chatter moderator, the community moderator, or the Salesforce administrator. The same users and moderators who can select a best answer for a question can also remove the best answer status from a question.

When an answer is selected as a best answer, a green check mark (✓) appears next to it. In addition, a copy of the answer with the green check mark appears at the top of the list of answer for the question so other users can view the best answer quickly.



Noah Larkin asked a question.

What is the best monitor for playing video games?

I was using a Cirrus 27" monitor before, but I want to move to a dual monitor setup. And I want the images to be really sharp. #Monitor #videogames

I've had a lot of different setups. @Allison Wheeler is right—you'll need a good graphic card. For the monitor, the 29" AW-TXJ is best for graphics and gaming.  
by Conner McCoy

Topics: Videogames, Monitor

Answer · Like · Today at 2:22 PM

Allison Wheeler

I've actually found that dual monitors aren't great for video game play. I find it distracting and hard to use. Quite often the graphics card won't keep up. However, if you're set on using a dual-monitor setup, I recommend the AW-PX16 graphics card and any monitor will do.

Like · Select as Best · Today at 2:32 PM

Yuko Ishikawa

I have the AW-900a monitor, and I love it!

AW-900a  
Download png (53 KB) · More Actions ▾

Like · Select as Best · Today at 2:35 PM

Selected as Best by Noah Larkin

Conner McCoy

I've had a lot of different setups. @Allison Wheeler is right—you'll need a good graphic card. For the monitor, the 29" AW-TXJ is best for graphics and gaming.

Like · Remove as Best · Today at 2:37 PM

Write an answer...

## Chatter Questions (Beta) FAQ

Here are some questions and answers about Chatter Questions.



**Note:** This release contains a beta version of Chatter Questions that is production quality but has known limitations. For information on enabling this feature for your organization, contact [salesforce.com](https://salesforce.com).

### Why should I use Chatter Questions instead of asking my question in a Chatter post?

Asking a question in Chatter saves you time. When you ask a question, similar questions and articles appear as you enter your question. Chances are that someone already asked the same question and it could have many answers or a best answer. Chatter Questions harnesses the value of content that already exists in Chatter.

### Can I filter the Chatter feed to show only questions?

Yes! At the top of your Chatter feed, click  next to Show and select Questions.

### Can I search for questions in Chatter?

Yes! Use the Search this feed button (🔍) at the top of your Chatter feed. Questions are included in the feed search results.

### Is Chatter Questions available in the Salesforce1 app?

Currently, Chatter Questions is available in the Salesforce1 mobile browser app only.

### What happens when someone asks a question?

Their question appears in the Chatter feed for their followers or the person or group they asked the question of. Email notification is also sent to the person or group they asked the question of. After a user asks a question, other users can then answer the question directly in Chatter.

### Who can select a best answer for a question?

The person who asked the question and moderators can select the best answer for a question. Moderators can be the Chatter moderator or the community moderator. Your Salesforce administrator can also select the best answer for a question.

## Other Changes in Chatter

Smaller changes can improve your experience with Chatter.

### Mobile User Context Switching from Emails

Links in Chatter email notifications or digests have been enhanced so they automatically open in the Salesforce1 app (instead of the full Salesforce site) when the user is working on a mobile device. Links also include data that Salesforce1 uses to correctly switch the user to the correct organization or community. Currently, Communities are supported in the Salesforce1 mobile browser app only.

### New Preview Links

We've added more previews for linked content:

- stream.co.jp
- stream.ne.jp

The previews are powered by Embed.ly, a third-party service, and include thumbnails, descriptions, and video players for links to videos. We don't share any content, user, organization, or account data with Embed.ly. We only share the URLs that are on the domain whitelist. Additionally, all of our URL requests pass through a Salesforce proxy, meaning Embed.ly never receives calls directly from the client and therefore doesn't have information about who's making the URL request.

### Dismiss Group Announcements

Previously, the only way to remove an announcement from a group's page was to delete the corresponding feed post.

Now you can dismiss an announcement without deleting the post. From the group detail page, click  in the top corner of the announcement, then click **Dismiss Banner Now**.

# Communities

Our improved community management tools make it even easier for your users to communicate and collaborate with customers and partners using Communities.

## **Community Engagement Console**

The new Community Engagement Console gives community managers a central place to monitor the health of their community and its members. Use it to view dashboards about groups, members, feed activity, and license usage, and to manage the community's reputation system.

## **Communities Analytics**

A handy set of new dashboards and reports gives community managers the tools to easily track community activity, membership, and participation.

## **Reputation**

Community managers know that recognition and a little friendly competition usually lead to more active members. So take advantage of a new, easy-to-use reputation system that builds on our existing gamification capabilities. Simply use the default levels and point values that appear when you enable reputation, or customize them to meet your needs.

## **Configure a Custom Domain for Your Community**

Set up a custom domain so that your community URLs reflect your company brand.

## **Guest User Access to Public Chatter Groups Without Logging In**

Open up access to community content so you can engage users who might not join otherwise. By enabling this setting, you open up certain methods in Chatter in Apex—that provide access to public groups, group feeds, and search in groups—to users that aren't logged in. Your developers will need to create a custom Visualforce page with the public group feed that can be accessed by any user.

## **Data Loader Now Supports Partner User Logins**

Data Loader now allows partner users to log in, as long as they're a member of an active community or a member of the first portal created in the organization.

## **Work.com Enhancements for Communities**

Thanks badges are now specific to the community they're created in, and communities users can receive rewards.

## **Other Changes in Communities**

We've made some additional improvements for communities administrators and users.

# Community Engagement Console

The new Community Engagement Console gives community managers a central place to monitor the health of their community and its members. Use it to view dashboards about groups, members, feed activity, and license usage, and to manage the community's reputation system.

When a community manager first accesses the Community Engagement Console, they see dashboards set up by the Salesforce administrator. There are up to five dashboards mapped to pages in the Community Engagement Console.

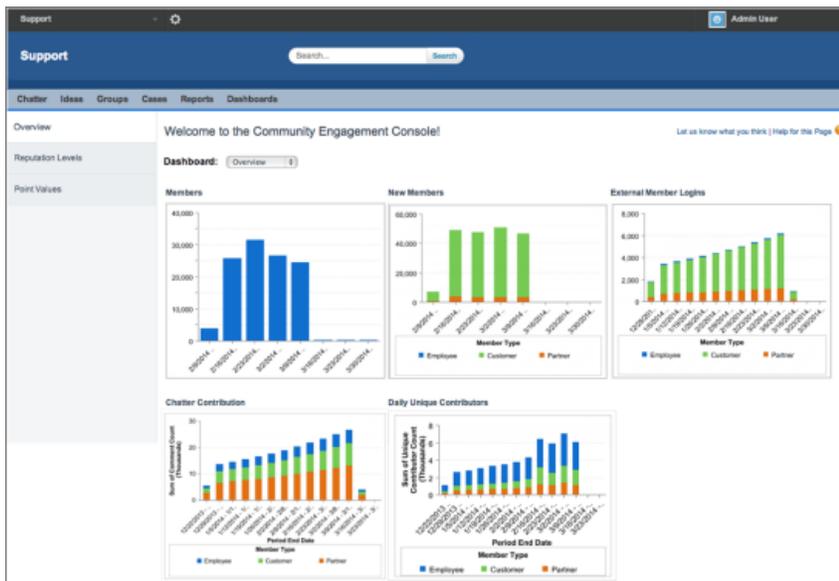
The Reputation and Point System tabs allow a community manager to customize reputation levels and a point system to reward members for Chatter activity in the community. For example, a member may gain points by creating a post, receiving a comment on a post, or liking someone else's post or comment.

For more information on these new community management features, see:

- [Communities Analytics](#)
- [Reputation](#)

To be a community manager and use the Community Engagement Console, a user must have either the “Manage Communities” or “Create and Customize Communities” permission. The user must also be an employee of your organization; external community members can’t be community managers. To access the Community Engagement Console, simply click the  in the global header next to the community drop-down.

For detailed information on managing your community using the Community Engagement Console, see the [Communities Managers Guide](#).



## Communities Analytics

A handy set of new dashboards and reports gives community managers the tools to easily track community activity, membership, and participation.

### **Dashboards for Community Managers**

Community managers can use dashboards to measure the health and ROI of their communities. Dashboards highlight trends in activity, such as member logins over time, and help compare levels of engagement across employee, customer, and partner members. As an administrator, you must set up the dashboards that community managers see.

### **Communities Reporting Enhancements**

As an administrator, you can use the new Communities custom report types to create reports for community managers.

## Dashboards for Community Managers

Community managers can use dashboards to measure the health and ROI of their communities. Dashboards highlight trends in activity, such as member logins over time, and help compare levels of engagement across employee, customer, and partner members. As an administrator, you must set up the dashboards that community managers see.

Within the Community Engagement Console, there are multiple pages you can map to dashboards that contain community-specific information. Dashboards that you map to pages in the Community Engagement Console are automatically filtered for the community, so long as the related report was created based on the Networks object.



**Note:** It's important that any user that clicks a dashboard to view the related report should not filter it based on a specific Network ID. Adding a Network ID to the report will cause the report to only show data for that specific community, regardless of which community you view it in.

Dashboards that aren't based on the Networks object will show in the Community Engagement Console, but they will display data from across the organization.

To show dashboards in the Community Engagement Console:

1. Set up dashboards. You must either:
  - Install the [Salesforce Communities Analytics package](#) from the AppExchange. This package contains pre-configured reports and dashboards that work right out-of-the-box.
  - [Create community dashboards](#). You must set up custom dashboards as documented in order to see relevant community data in the Community Engagement Console.
2. [Map the dashboards to pages in the Community Engagement Console](#).

## Salesforce Communities Analytics Package



**Note:** The Salesforce Communities Analytics package will be available on the AppExchange shortly after Summer '14.

The Salesforce Communities Analytics package gives community managers an essential set of dashboards and reports to keep tabs on activity and engagement in their communities. Get insights from the latest metrics and rapidly spot trends. How fast is your community growing? Who are the most engaged members? Which areas need attention?

The package comes in two versions: one for communities that have Chatter enabled and one for those that don't. Download and install the appropriate version to access these dashboards and their source reports, alongside all your other Salesforce dashboards and reports.

Dashboard	Description	Requires Chatter
Overview	See the overall state of your communities at a glance. 90-day trending reports show total membership, newly joined members, and member logins. If you have Chatter enabled, 90-day snapshots show post and comment metrics.	
Activity	See metrics about posts, comments, daily unique contributors, and which types of members are contributing posts and comments.	✓
Groups	Monitor membership and post and comment activity within groups, one of the top drivers of community success.	✓
Members	Gauge membership growth and see login metrics for the last 30 days.	
Licenses	Track license usage and login frequency by customer and partner licenses.	

## Create Dashboards for the Community Engagement Console

Create dashboards as documented in order to see relevant community data in the Community Engagement Console.

User Permissions Needed	
To create custom report types:	“Manage Custom Report Types”
To create, edit, and delete reports:	“Create and Customize Reports”
To create dashboards:	“Run Reports” AND “Manage Dashboards”



**Tip:** If you prefer to use out-of-box, pre-configured dashboards, install the Salesforce Communities Analytics Package. This package will be available on the AppExchange shortly after the Summer ‘14 release.

These are the high-level steps for creating a dashboard to show in the Community Engagement Console. For detailed steps on creating custom report types, reports, or dashboards, refer to the Salesforce Help.

1. Create custom report types based on the Networks object, so that you can easily create community-scoped reports and dashboards.  
For information on the new custom report types you can create, see [Communities Reporting Enhancements](#) on page 105.
2. Create a report with a Type of Matrix or Summary.
  - Ensure that the report has a GroupBy element.
  - Ensure that the report has a chart.
  - Ensure that the report is not filtered by Network ID. This is required if you want to leverage dynamic community filtering within the Community Engagement Console.
  - Either save the report to a Public folder or extend access to community managers using sharing.
3. Create a dashboard using the report you created as the source.



**Note:** Customizations you make to the dashboard won’t show up in the Community Engagement Console. You must customize the report directly.

Keep in mind that the dashboards in the Community Engagement Console are automatically scoped for the community in which you’re viewing them. The Community Engagement Console doesn’t support the “run as user” feature.

Dashboards in the Community Engagement Console are automatically refreshed every day. To see the latest data, you must refresh the underlying report, not the dashboard.

## Map Dashboards to Pages in the Community Engagement Console

Mapping dashboards makes them visible in the Community Engagement Console, which helps your community managers monitor adoption and member engagement.

User Permissions Needed	
To edit Communities settings:	“Customize Application”

Dashboards selected in community settings are visible to community managers in the Community Engagement Console. You can choose any dashboard you have access to, however, you need to ensure that your community managers have access as well. You can map up to five dashboards.

When selecting dashboards, keep in mind that only dashboards created based on the Networks object will display community-specific information in the Community Engagement Console. Dashboards that aren’t based on the Networks object display data from across the organization.

If you install the Salesforce Communities Analytics package from the AppExchange, the dashboards from the package will automatically be mapped to the corresponding pages in the Community Engagement Console.



**Note:** The Salesforce Communities Analytics package will be available on the AppExchange shortly after Summer '14.

1. From Setup, click **Customize > Communities > Settings**.
2. For each of the pages, select the dashboard you want to show to community managers.
3. Click **Save**.

Verify the dashboard mappings by visiting the Community Engagement Console in each of your communities.

## Communities Reporting Enhancements

As an administrator, you can use the new Communities custom report types to create reports for community managers.

We're introducing four new custom report types, which can be used to create trending reports. Trending reports are a valuable tool for exposing and tracking trends in your community, such as who are the most active members by user type for a specific time period. Trending reports show daily or weekly aggregated data, as opposed to snapshot reports, which show only current data.

These new custom reports types are available:

### Network Membership Daily Metrics

Daily count of total active members, new members added, and external member logins by member type.

To create this custom report type, select Networks as the primary object and Network Membership Daily Metrics as the related report object.

### Network Activity Daily Metrics

Daily number of posts and comments, on groups and user profiles, by member type.

To create this custom report type, select Networks as the primary object and Network Activity Daily Metrics as the related report object.

### Network Unique Contributor Daily Metrics

Unique daily contributors. A member is counted as a contributor if he posted or commented on a group or user profile.

To create this custom report type, select Networks as the primary object and Network Unique Contributor Daily Metrics as the related report object.

### Network Tenant Usage Entitlement Weekly Metrics

Weekly usage entitlements values in buckets for login-based and member-based licenses. Buckets include portal and Communities licenses.

To create this custom report type, select Network Tenant Usage Entitlement Weekly Metrics as the primary object.

To create custom report types, from Setup, click **Create > Report Types**. For full instructions, see *"Create a Custom Report Type"* in the Salesforce Help.

# Reputation

Community managers know that recognition and a little friendly competition usually lead to more active members. So take advantage of a new, easy-to-use reputation system that builds on our existing gamification capabilities. Simply use the default levels and point values that appear when you enable reputation, or customize them to meet your needs.

Community managers with the “Manage Communities” permission can personalize labels and point values directly in the Community Engagement Console.

Members start to accrue points by performing the actions that have assigned point values. Once the member reaches the top of the level’s point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member’s profiles.

## Enable Reputation for Your Community

Enable reputation in your community to recognize and reward members for participating.

### Set Up Reputation Levels

Update the default reputation levels to meet your community’s needs and help motivate your members.

### Set Up Reputation Points

Set up a point system to reward users for participating in the community.

## Enable Reputation for Your Community

Enable reputation in your community to recognize and reward members for participating.

User Permissions Needed	
To edit Communities settings:	“Customize Application”



**Note:** When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. From Setup, click **Customize > Communities > Manage Communities**, then click **Edit** next to the community name.
2. Click **Miscellaneous**.
3. Select **Reputation**, then click **Save**.

A default point system and set of reputation levels is created in the Community Engagement Console.

## Set Up Reputation Levels

Update the default reputation levels to meet your community’s needs and help motivate your members.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To update reputation levels:	“Manage Communities”

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range for each level.



**Note:** A community must have at least three reputation levels and can have up to 50.

1. From the community, click  in the global header.
2. Click **Reputation Levels**.

From here you can:

- Give each level a name, such as “Beginner,” “Intermediate,” “Expert.” If you don’t assign a name, the default is used. For example, “Level 1,” “Level 2,” “Level 3.”
- Edit the point range for a level.

When you update the higher value of a level’s point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking **Add a level**, located underneath the list of levels.
- Remove a level by clicking  next to the level.

3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts.

## Set Up Reputation Points

Set up a point system to reward users for participating in the community.

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

### User Permissions Needed

To update reputation points:	“Manage Communities”
------------------------------	----------------------

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

The table shows the default events and points.

Action	Points
Write a post	+1
Write a comment	+1
Receive a comment	+5
Like something	+1
Receive a like	+5
Mention someone	+1
	If your post contains more than one @mention, you get a point for each @mention.

Action	Points
Someone mentions you	+5
Share a post	+1
Someone shares your post	+5

1. From the community, click  in the global header.
2. Click **Point Values**.
3. Update the points for each event. If you don't want users to accrue points for a certain event, set the Points to 0.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.

## Configure a Custom Domain for Your Community

Set up a custom domain so that your community URLs reflect your company brand.

User Permissions Needed	
To view domains:	“View Setup and Configuration”
To add domains:	“Customize Application” or “View Setup and Configuration” plus either a Site.com Publisher license or “Create and Customize Communities”
To edit or delete domains:	“Customize Application”
To associate certificates with a domain:	Contact salesforce.com



**Note:** Before you configure a custom domain for your community, you must enable HTTPS custom domains for your organization. To do this, contact salesforce.com.

Custom domains are supported only in non-sandbox instances. You can configure a custom domain in a sandbox instance and then migrate it to a production instance, but the custom domain is only active in production.

When you add a domain, you also have the option of attaching a certificate and key for connection security. If you're going to use a certificate, make sure you've already added it using Certificate and Key Management before you try to attach it to your domain. Only CA-signed certificates are supported, and they must be 2048 bits in length. To support all domains that are hosted by sites in your organization, use a wildcard or Subject Alternative Name certificate.

1. From Setup, click **Domain Management > Domains**.
2. Click **Add a Domain**.
3. Enter the Domain Name.
4. Add a certificate if you have already set up a CA-signed certificate that supports this domain.
5. Click **Save**. Alternatively, click **Save & New** to add multiple domains.

If you plan to host more than one community on a domain, you'll need to set up custom URLs for each site. Custom URLs are the way to uniquely distinguish the communities within that domain. From Setup, click **Domain Management > Custom URLs**.

Before you switch the CNAME of your domain name to point to a new target name, ensure that the new target name exists in the DNS by using `dig` or `nslookup`. When you created your domain names affects the target of your CNAME:

- Domain names that were added before Summer '13, typically need to have their CNAME adjusted to point to the fully qualified domain followed by `.live.siteforce.com` instead of to the organization's `force.com` sub-domain. For example, if your pre-Summer '13 domain is `www.example.com`, then the target of its CNAME will need to be `www.example.com.live.siteforce.com` instead of `example.force.com` before HTTPS will work.
- Domain names that were added in or before Summer '13, don't have the 18-character organization ID in the CNAME target.
- Domain names that were added in or after Summer '13, already point to the proper place for setting up HTTPS in a custom domain.
- Domain names that were added in or after Winter '14, use a CNAME that points to the fully qualified domain followed by your organization's 18-character ID and `.live.siteforce.com`. For example, if your domain name is `www.example.com` and your 18-character organization ID is `00dxx0000001ggxeay`, then the target of its CNAME will need to be `www.example.com.00dxx0000001ggxeay.live.siteforce.com`.

## Guest User Access to Public Chatter Groups Without Logging In

Open up access to community content so you can engage users who might not join otherwise. By enabling this setting, you open up certain methods in Chatter in Apex—that provide access to public groups, group feeds, and search in groups—to users that aren't logged in. Your developers will need to create a custom Visualforce page with the public group feed that can be accessed by any user.

To enable guest user access in your community:

1. From Setup, click **Customize > Communities > Manage Communities**, then click **Edit** next to the community name.
2. Click **Miscellaneous**.
3. In the General section, select the checkbox for allowing guest access to Chatter.

For information on the Connect in Apex endpoints that are available, see [Access public Chatter groups from a guest user account](#) on page 283.

## Data Loader Now Supports Partner User Logins

Data Loader now allows partner users to log in, as long as they're a member of an active community or a member of the first portal created in the organization.

Partner users who don't meet these criteria still can't log in via Data Loader. For more information about using Data Loader, refer to the *Salesforce Help*.

## Work.com Enhancements for Communities

Thanks badges are now specific to the community they're created in, and communities users can receive rewards.

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

Badges and Rewards require a license to **Work.com Motivate**, **Work.com Align**, or **Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition** or **Unlimited Edition** and are included in **Performance Edition**.

### Thanks Badges are Specific to Each Community

Badges created in a community appear only in that community. Badges created in an internal organization are not available in a community. Only users with a Salesforce internal license can create badges in a community.

### Communities Users Can Receive Rewards

Communities users with a Work.com license can now receive rewards. Work.com Rewards enable users to tie tangible rewards, such as gift certificates, to thanks badges. See [Recommended Permission Sets](#) in the Work.com Help for more information.

## Other Changes in Communities

We've made some additional improvements for communities administrators and users.

### Share URL Moved To The Communities Settings Overlay

The share URL for previewing a community has moved from the Members tab to the Communities Settings overlay. To share the URL, click **Share before publishing**, then copy the URL and send it to the appropriate members.

### Communities Now Tracked in Login History

Users can now see a history of which communities they've logged in to. Administrators can report on logins by adding the *Community* column to user-based reports in the Administrative folder.

### Task Reminders for Partner Users

Task reminders are now available to partner users in communities. This includes users with a partner portal or Partner Community license.

Partner users in communities can see their reminders by clicking **Your Name > My Settings > Reminders**.

### Data Loader Available to Partner Community Users

Users with Partner Community or partner portal licenses can now use the Data Loader to import data into their communities.

### Caching Now Available for Unauthenticated Visualforce Pages

Previously, for community sites, only static resources such as images and files were cached. Now, Visualforce pages in unauthenticated community sites are cached via our proxy Salesforce servers. This improves page load times and site performance and helps you avoid reaching limits for bandwidth or service request time.

Control the caching behavior for your site by setting the Boolean `cache` attribute and integer `expires` attribute on each Visualforce page. By default, pages that don't have the `cache` attribute set are cached for 10 minutes.

Community Page Type	Caching Location
Authenticated Visualforce page	None
Unauthenticated Visualforce page (HTTP/HTTPS)	Server

### “Create and Manage Communities” Permission Renamed

The “Create and Manage Communities” permission has been renamed to “Create and Customize Communities”.

**Company Community License Renamed**

The Company Community license is now called the Employee Community User license. The Company Community for Force.com permission set is now called the Employee Community User for Force.com permission set.

# Sales

Salesforce is the world's #1 sales and CRM application. Our latest features help your sales reps close bigger deals with even more efficiency.

## ***Manage Sales on the Go!***

With the Salesforce1 app, your users can stay current on their most important records, activities, and conversations while out of the office.

## ***Opportunities and Collaborative Forecasts***

Help your sales team better plan for and predict sales based on opportunities your team has in their pipeline. You can now fully customize opportunity splits and add custom split types to better match your business model. We've also improved your ability to accurately predict outcomes across sales teams and product lines, increased flexibility around how sales teams work with forecasts, and made it easier to view opportunity splits information within a forecast.

## ***Model, Manage, and Analyze Your Sales Territories with Territory Management 2.0 (Beta)***

Territory Management 2.0 lets you model your sales territories into a logical and flexible structure that connects sales reps to the accounts they sell to.

## ***Salesforce for Outlook***

We're continuing to help users be more productive when they use the Salesforce for Outlook Side Panel. We're also giving you more security control in Salesforce for Outlook.

## ***Salesforce Console for Sales***

The Salesforce Console for Sales is a dashboard-like app designed to help you access sales intelligence quickly with fewer clicks and less scrolling.

## ***Activities***

Events and tasks are the building blocks of sales productivity. We've made enhancements that boost your sales teams' edge over the competition, along with updates to improve performance and usability.

## ***Customizable Price Book Entries***

Administrators can customize price book entries in the user interface.

## ***Generate Orders (Pilot)***

Automatically create an order with order products from an opportunity or quote. You can also generate and relate the order to a contract.

## ***Other Changes in the Sales Cloud***

Learn about other changes that affect your sales teams.

# Manage Sales on the Go!

With the Salesforce1 app, your users can stay current on their most important records, activities, and conversations while out of the office.

The Salesforce1 app helps sales professionals manage Salesforce records like tasks, contacts, and opportunities—all from their mobile devices. In addition, Today, an app that helps sales team members plan for and manage their day, integrates calendar

events from their mobile devices with their Salesforce tasks, contacts, person accounts, user records, and other key CRM data. Learn about the latest mobile features in [Salesforce1](#).

## Opportunities and Collaborative Forecasts

Help your sales team better plan for and predict sales based on opportunities your team has in their pipeline. You can now fully customize opportunity splits and add custom split types to better match your business model. We've also improved your ability to accurately predict outcomes across sales teams and product lines, increased flexibility around how sales teams work with forecasts, and made it easier to view opportunity splits information within a forecast.

Forecasts are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

Opportunity Splits are available in **Enterprise, Performance, Unlimited, and Developer** Editions.

### **Complete Customization Available for Opportunity Splits**

You can now customize opportunity splits to better serve your business needs.

### **Add Custom Split Types for Opportunity Splits**

Streamline your sales operations by creating new custom split types for your organization. By default, your organization is provided with two splits on the Opportunity - Amount field, one of which must total 100%, and one of which can total any percentage. Now you can create up to three more split types, for a total of up to five split types.

### **Opportunity Splits Appear in Subtabs**

Each opportunity split type is now available in a separate subtab of the Opportunity Split edit page.

### **View Opportunity Split Details in Forecasts**

Your sales teams can now see the splits on opportunities directly in any splits-based forecast.

### **Custom Field Forecasts (Pilot)**

Give your sales teams added flexibility for predicting revenue—let them forecast on custom opportunity currency fields that matter to your organization.

### **Overlay Forecasts (Pilot)**

Sales managers can track revenue from sales team members who help close opportunities, but are not directly responsible for them.

### **Historical Trending for Forecasts**

Sales users can now see how their forecasts have changed over time.

### **Forecasts 1.0 (Classic) is Retired in Summer '14**

Effective with Summer '14, Forecasts 1.0 (Classic) is officially retired. For more information, please contact [salesforce.com](#) Customer Support.

## Complete Customization Available for Opportunity Splits

You can now customize opportunity splits to better serve your business needs.

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

You can customize opportunity splits in these ways:

- Add custom fields
- Set up validation rules
- Set up triggers
- Edit page layouts

In addition, if you use Unlimited or Performance edition, you can now set up custom split types in the Settings area for opportunity splits, and you can configure workflows.

To set up opportunity splits for your organization, go to **Setup**, then click **Opportunity > Opportunity Splits**.

### **Edit Custom Fields on Opportunity Splits**

Users can now edit custom fields, as well as standard fields, for their opportunities.

## **Edit Custom Fields on Opportunity Splits**

Users can now edit custom fields, as well as standard fields, for their opportunities.

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

<b>User Permissions Needed</b>	
To edit opportunity splits:	“Edit” on Opportunities AND Owner of the opportunity record, or above the owner in the organization hierarchy

Now your users can edit custom fields for each opportunity split in-line on the Opportunity Split Detail page. Standard fields (Team Member, Percent, Amount, and Note) can still be edited on the Opportunity Split edit page.

To edit custom fields for opportunity splits, on the opportunity split related list, select the name of the team member for the opportunity to be edited. Then click in the field being edited. When edits for the opportunity split are complete, click **Save**.

## **Add Custom Split Types for Opportunity Splits**

Streamline your sales operations by creating new custom split types for your organization. By default, your organization is provided with two splits on the Opportunity - Amount field, one of which must total 100%, and one of which can total any percentage. Now you can create up to three more split types, for a total of up to five split types.

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

Split types can be based on most Opportunity currency fields, except formula currency fields.

Custom split types let you customize opportunity splits to better reflect your business process. For example, your company may want to split credit for the opportunity on the standard Estimated Revenue field. Or perhaps your company wants to add a currency field for profit, then create a new split type based on profit from the opportunity.

Contact Salesforce to have custom split types enabled for your organization.

### Create Custom Split Types for Opportunity Splits

Create custom opportunity splits to better reflect your business operations by setting up splits on most currency fields for an opportunity, including custom currency fields and roll-up summary fields.

## Create Custom Split Types for Opportunity Splits

Create custom opportunity splits to better reflect your business operations by setting up splits on most currency fields for an opportunity, including custom currency fields and roll-up summary fields.

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

### User Permissions Needed

To create custom split types:

“Customize Application”



**Note:** Changes to opportunity split types are completed by a background process. You will be notified by email when the background process has finished making changes to your organization. We recommend not editing any existing splits on your opportunities until the changes are complete.

1. From **Setup**, click **Opportunities > Opportunity Splits**, then click **Edit Split Types**.
2. Click + **Add a new split type**.
3. If you don't want the split to be visible to users yet, deselect **Active**.
4. Enter a name for the split type. The name will be visible to users when the type is visible.
5. Select a field to split. You can split most currency fields created on opportunities, including custom currency fields and roll-up summary fields. However, you can't split formula currency fields.
6. If you want the splits for this type to total 100%, select **Totals 100%**.  
Credit for team members directly responsible for the opportunity should usually total 100%.
7. Click **Save**.

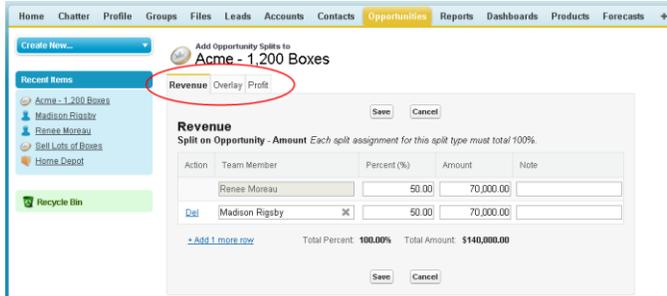
## Opportunity Splits Appear in Subtabs

Each opportunity split type is now available in a separate subtab of the Opportunity Split edit page.

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

To edit opportunity split data, from the Opportunity Splits related list on an opportunity, click **Edit Opportunity Splits**, then select the split type you'd like to edit.

To save changes made to a split assignment, click **Save** before switching tabs.



## View Opportunity Split Details in Forecasts

Your sales teams can now see the splits on opportunities directly in any splits-based forecast.

To view the splits for an opportunity, sales users can hover over the split percent for the opportunity and then click . The Opportunity Splits detail window appears, showing splits that roll up to the selected forecast cell in bold. Other splits on the opportunity that do not roll up to the selected forecast cell appear in gray. Opportunities that contain only a single 100% split for the opportunity owner do not display split details.

Action	Opportunity Name	Account Name	Forecasted Amount	Split	Opportunity Splits												
Edit	Canson 55 Widget...	Canson	USD 307,500.00	<b>25.00%</b>	<table border="1"> <thead> <tr> <th>Percent</th> <th>Team Member</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>25.00%</td> <td>Kevin Bailey</td> <td>USD 307,500.00</td> </tr> <tr> <td>75.00%</td> <td>Anna Bressan</td> <td>USD 922,500.00</td> </tr> <tr> <td colspan="2">Total Opportunity Value:</td> <td>USD 1,230,000.00</td> </tr> </tbody> </table>	Percent	Team Member	Amount	25.00%	Kevin Bailey	USD 307,500.00	75.00%	Anna Bressan	USD 922,500.00	Total Opportunity Value:		USD 1,230,000.00
Percent	Team Member	Amount															
25.00%	Kevin Bailey	USD 307,500.00															
75.00%	Anna Bressan	USD 922,500.00															
Total Opportunity Value:		USD 1,230,000.00															
Edit	Red Packages - 10...	Red Packages	USD 137,500.00	25.00%													
Edit	Red Packages - 10...	Red Packages	USD 137,500.00	25.00%													
Edit	Canson - 20 Spide...	Canson	USD 43,250.00	25.00%													
Edit	Universal Technolo...	Universal Technolo...	USD 14,250.00	25.00%													

## Custom Field Forecasts (Pilot)

Give your sales teams added flexibility for predicting revenue—let them forecast on custom opportunity currency fields that matter to your organization.

### Track and Predict Revenue from Custom Opportunity Fields

Help your sales teams predict revenue beyond the standard Amount field they've already been using.

### Enable Custom Field Forecasts for Sales Managers

To enable a custom field forecast, first enable a custom split type for the field, and then add a forecast for it.

## Track and Predict Revenue from Custom Opportunity Fields

Help your sales teams predict revenue beyond the standard Amount field they've already been using.

Custom Field Forecasts are available in: **Performance**, **Unlimited**, and **Developer** Editions



**Note:** Custom Field Forecasts are currently available through a pilot program. Contact salesforce.com to enable this feature for your organization. Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Now, your sales teams can forecast on custom currency fields on opportunities. For example, your sales teams might use a custom field such as Margin, Monthly Recurring Revenue, Annual Contract Value, or any other currency field that your

organization requires. You can easily set up forecasts based on any of those custom fields, which your sales managers can then view in the Forecasts tab like any other forecast.

If you use opportunity splits with your custom field, your forecast incorporates those splits. You can use a custom field forecast by itself or in addition to other forecasts, such as an opportunity-revenue forecast based on the opportunity Amount field.

## Forecasting on Annual Contract Value-a Simple Custom Field Forecast

Here we see an opportunity owned by sales rep Anna Bressan. Anna's organization has a lot of multi-year deals, so they use a custom Annual Contract Value field to track the revenue received from the deal each year.

The screenshot shows the 'Opportunity Detail' page for 'Acme - Premium Support'. The page includes a navigation bar with links like 'Back to List: Users', 'Opportunity Team', 'Opportunity Splits', etc. The main content area displays various fields for the opportunity, including 'Opportunity Owner', 'Opportunity Name', 'Account Name', 'Type', 'Primary Campaign Source', 'Discount Percentage', 'Commission', 'Region/Zone', 'Discounted Amount', and 'Annual Contract Value'. Red boxes with numbers 1 and 2 highlight the 'Opportunity Owner' field (Anna Bressan) and the 'Annual Contract Value' field (USD 125,000.00) respectively.

1. Anna owns this opportunity
2. The custom Annual Contract Value field

The Annual Contract Value field in all of Anna's opportunities rolls up into her Annual Contract Value forecast, which appears in the Forecasts tab along with any other forecasts that you set up.

The screenshot shows the 'Forecasts' tab in the system. The top navigation bar includes 'Home', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Reports', 'Dashboards', 'Documents', 'Products', and 'Forecasts'. The main content area displays the 'Anna Bressan Forecast' table. The table has columns for 'Closed', 'Commit', 'Best Case', and 'Pipeline'. The 'Total' row shows a forecast for 3 months. Below the table, there is a list of forecast categories for April FY 2014, with a total of USD 2,408,750.00. Red boxes with numbers 1, 2, 3, and 4 highlight the 'Forecast Category' dropdown, the 'Annual Contract Value in U.S. Dollar' field, the 'Forecasted Amount' column, and the 'Acme - Premium Support' row respectively.

	Closed	Commit	Best Case	Pipeline
<b>Total: 3 Months (Change)</b>	USD 20,000.00	USD 1,276,250.00	USD 3,649,500.00	USD 2,033,000.00
April FY 2014	USD 0.00	USD 1,221,250.00	USD 922,500.00	USD 265,000.00
May FY 2014	USD 20,000.00	USD 27,500.00	USD 1,340,000.00	USD 1,719,000.00
June FY 2014	USD 0.00	USD 27,500.00	USD 1,387,000.00	USD 49,000.00

Action	Opportunity Name	Account Name	Forecasted Amount	Split	Close Date	Stage	Probability (%)	Forecast Category	Owner Full Name	Amount
Edit	Canson 55 Widget Deal	Canson	USD 922,500.00	---	4/23/2014	Proposal/Price ...	75	Best Case	Bressan, Anna	USD 1,230,000.00
Edit	Red Packages - 10 Spi...	Red Packages	USD 550,000.00	---	4/30/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Red Packages - 10 Spi...	Red Packages	USD 550,000.00	---	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Canson - 20 Spider 4 S...	Canson	USD 173,000.00	---	4/14/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 383,250.00
Edit	Acme - Premium Support	Acme Inc.	USD 125,000.00	---	4/15/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 250,000.00
Edit	Universal Technologe...	Universal Tec...	USD 57,000.00	---	4/11/2014	Needs Analysis	20	Pipeline	Bressan, Anna	USD 117,700.00
Edit	STC Labs - 9 Infinity La...	STC Labs	USD 25,000.00	---	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 50,000.00
Edit	STC Labs - 15 Infinity L...	STC Labs	USD 14,000.00	---	4/11/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 28,000.00

1. The Annual Contract Value forecast for Anna
2. This forecast has the same name as the custom field
3. The Forecasted Amount is the value of the Annual Contract Value field that rolls up into Anna's forecast
4. The amount from the Annual Contract Value field on Anna's Acme - Premium Support opportunity

## A Custom Field Forecast with Opportunity Splits

If you use opportunity splits on your custom fields, your custom field forecasts roll up those splits. For example, here we can see that sales representative Anna owns an opportunity, which includes a custom split on the Annual Contract Value field for Kevin, a sales engineer responsible for increasing overall Annual Contract Value for the company. In this case, Kevin's 25% split will roll up into his Annual Contract Value forecast.

Opportunity  
Acme - Premium Support

Customize Page | Edit Layout | Printable View | Help for this Page

Click to add topics

< Back to List

Opportunity Team [3] | Opportunity Splits [3] | Open Activities [0] | Activity History [0] | Contact Roles [0] | Partners [0] | Competitors [0] | Products [0] | Notes & Attachments [0] | Stage History [3]

**Opportunity Detail** [Edit] [Delete] [Clone] [Sharing]

Opportunity Owner	Anna Bressan [Change]	Close Date	4/15/2014
Opportunity Name	Acme - Premium Support	Stage	Negotiation/Review
Account Name	Acme Inc.	Probability (%)	90%
Type	Existing Business	Amount	USD 250,000.00

Primary Campaign Source

Discount Percentage

Commission USD 0.00

Region/Zone /

Discounted Amount USD 250,000.00

Annual Contract Value USD 125,000.00

► Finance Information

► Additional Information

► System Information [Edit] [Delete] [Clone] [Sharing]

**Opportunity Team** [Add] [Add Default Team] [Display Access] Opportunity Team Help

Action	Team Member	Member Role
Edit	Anna Bressan	Opportunity Owner
Edit   Del	Kevin Bailey	Pre Sales Engineer

**Opportunity Splits** [Edit Opportunity Splits] [Feedback Survey] Video Tutorial | Opportunity Splits Help

Action	Team Member	Opportunity Split Type	Percent (%)	Amount	Note
Del	Anna Bressan	Annual Contract Value	75.00	USD 93,750.00	
Del	Kevin Bailey	Annual Contract Value	25.00	USD 31,250.00	

1. Anna owns this opportunity
2. The opportunity contains a custom currency field called Annual Contract Value
3. Kevin receives a 25% split on the Annual Contract Value field

Kevin's manager can view the Annual Contract Value forecast where he can see the deal to which Kevin is contributing, along with all of the other opportunities his sales engineer team is working on. Kevin's manager can see that Kevin is receiving a 25% credit for all of his opportunities, which contribute to a total of \$1,052,250 revenue in his Best Case forecast. If Kevin's manager thinks the deal will ultimately close for a higher amount, his manager can adjust the Best Case forecast amount upward. Anna's manager can see Anna's 75% split in their forecast.

Home Chatter Leads Accounts Contacts Opportunities Reports Dashboards Documents Products Forecasts +

Jump to... | Allison Wheeler | Jessica Heinz | **1** Annual Contract Value in U.S. Dollar | Display Options Refresh

Kevin Bailey Forecast

Amounts shown are based on exchange rate conversion.

	Closed	Commit	Best Case	Pipeline
Total: <b>3 Months</b> (Change)	USD 36,250.00	USD 326,875.00	USD 1,026,000.00	USD 812,000.00
April FY 2014	USD 0.00	USD 313,125.00	USD 307,500.00	USD 66,250.00
May FY 2014	USD 5,000.00	USD 6,875.00	USD 371,750.00	USD 733,500.00
June FY 2014	USD 31,250.00	USD 6,875.00	USD 346,750.00	USD 12,250.00

Kevin Bailey • April FY 2014 • All Forecast Categories • **USD 686,875.00** Hide

Action	Opportunity Name	Account Name	Forecasted Amount	Split	Close Date	Stage	Probability (%)	Forecast Category	Owner Full Na...	Amount
Edit	Canson 55 Widget Deal	Canson	USD 307,500.00	25.00%	4/23/2014	Proposal/Price Q...	75	Best Case	Bressan, Anna	USD 1,230,000.00
Edit	Red Packages - 10 Spld...	Red Packages	USD 137,500.00	25.00%	4/30/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Red Packages - 10 Spld...	Red Packages	USD 137,500.00	25.00%	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Canson - 20 Spider 4 S...	Canson	USD 43,250.00	25.00%	4/14/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 383,250.00
Edit	Acme - Premium Support	Acme Inc.	USD 31,250.00	25.00%	4/15/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 250,000.00
Edit	Universal Technologies...	Universal Tec...	USD 14,250.00	25.00%	4/11/2014	Needs Analysis	20	Pipeline	Bressan, Anna	USD 117,700.00

1-11 of 11 | Page 1 of 1 | Chat

1. Kevin's Annual Contract Value split forecast
2. Kevin's 25% splits on Anna's Acme – Premium Support opportunity

### Forecasts with the Expected Revenue Field

If your organization uses the standard Expected Revenue field, you can set up a forecast for it as well. The Expected Revenue field is useful for opportunities that are likely to produce more or less revenue than indicated in the Amount field.

## Enable Custom Field Forecasts for Sales Managers

To enable a custom field forecast, first enable a custom split type for the field, and then add a forecast for it.

User Permissions Needed	
To enable opportunity split types:	“Customize Application”
To view Forecast Setup:	“View Setup and Configuration”
To edit Forecast Settings:	“Customize Application”

For each custom field your sales teams want to forecast on, first enable a custom split type—even if the fields don't include splits. When a sales rep creates an opportunity, the rep automatically receives a 100% split for any 100% validated custom split type you enable. So even if you don't intend to split the custom field, the forecast rollup always includes 100% of the amount in the custom field.

Before you enable custom field forecasts, make sure you've enabled:

- Collaborative Forecasts
- At least one custom opportunity currency field
- Team Selling and Opportunity Splits
- A custom opportunity split type based on the custom field (For details on enabling split types, search Salesforce Help for “Enabling Opportunity Splits and Split Types” .)

With those features enabled, you're ready to enable a custom field forecast.

1. From Setup, click **Customize > Forecasts > Settings**.
2. If your organization:
  - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.

- Already has at least one forecast type enabled, click **Add Another Forecast Type**. Enable up to four forecast types.
3. From the Forecast Type menu, choose the name of the custom opportunity split type you created based on your custom opportunity field. Revenue is the only forecast measurement available for custom field forecasts.
  4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the custom field forecast.
  5. Click **OK** and then **Save**.

## Overlay Forecasts (Pilot)

Sales managers can track revenue from sales team members who help close opportunities, but are not directly responsible for them.



**Note:** Overlay Forecasts are currently available through a pilot program. Contact salesforce.com to enable this feature for your organization. Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Your sales managers may already be using revenue splits for crediting team members who are directly responsible for opportunities. To provide more flexibility with how they assign credit for opportunities, we've added overlay splits, which help sales managers and other team members allocate credit to overlay sales roles for working on opportunities. Overlay splits can add up to any percentage of the opportunity amount, sometimes exceeding 100%. For example, a sales team may include sales engineers, product specialists, or partners who help close deals, but are not directly responsible for them.

Overlay Forecasts let sales managers predict revenue from overlay splits. Forecast amounts roll up through the role hierarchy based on the opportunity's amount field and the overlay team member's split percentage.

For complete details, see [Predicting Revenue from Supporting Team Members with Overlay Forecasts \(Pilot\)](#).

### Enable Overlay Forecasts for Sales Managers

Help your sales teams track revenue from overlay sales roles when you add Overlay Forecasts to your organization.

## Enable Overlay Forecasts for Sales Managers

Help your sales teams track revenue from overlay sales roles when you add Overlay Forecasts to your organization.

User Permissions Needed	
To view Forecast Setup:	"View Setup and Configuration"
To edit Forecast Settings:	"Customize Application"

Before you enable Overlay Forecasts, make sure you've enabled:

- Collaborative Forecasts
- Team Selling and Opportunity Splits
- The Overlay opportunity split type

With those features enabled, you're ready to enable Overlay Forecasts.

1. From Setup, click **Customize > Forecasts > Settings**.
2. If your organization:
  - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.

- Already has at least one forecast type enabled, click **Add another forecast type**. You can enable up to four forecast types.
3. From the Forecast Type menu, choose **Opportunity Overlay Splits**. Revenue is the only forecast measurement available for overlay splits.
  4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the overlay forecast.
  5. Click **OK** and then **Save**.

## Historical Trending for Forecasts

Sales users can now see how their forecasts have changed over time.

You can now use reports to examine how your forecast data has changed over the prior three months or quarters. For complete details, see [Track Forecasting Changes](#).

## Forecasts 1.0 (Classic) is Retired in Summer '14

Effective with Summer '14, Forecasts 1.0 (Classic) is officially retired. For more information, please contact salesforce.com Customer Support.

We recommend using Collaborative Forecasts to manage your forecasts. To get started, see the [Forecasts Administrator's Workbook](#), which provides a full step-by-step description of how to set up Collaborative Forecasts for your organization.



**Note:** Customizable Forecasts is not affected by this announcement. Only Forecasts 1.0 (Classic) is being retired.

## Model, Manage, and Analyze Your Sales Territories with Territory Management 2.0 (Beta)

Territory Management 2.0 lets you model your sales territories into a logical and flexible structure that connects sales reps to the accounts they sell to.

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

Salesforce's original territory management feature lets you grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field relevant to your business. Territory Management 2.0 builds on that by introducing territory types, territory models, and territory model states. Use these tools to create and preview multiple territory structures and strategies before you activate and implement the one that works best. Custom reports help you organize your territory model for optimum coverage, assess territory effectiveness, and modify your model if necessary.

Territory Management 2.0 is API ready, with nine new objects that help you manage territories, assign records, and assign users programmatically. For more information, check out [New Objects](#) on page 292.

For best success with Territory Management 2.0, read the full product implementation documentation—available in the Salesforce Help and as a PDF guide: *Implementing Territory Management 2.0 (Beta)*. We also welcome you to join our success community on Chatter, Sales Cloud – Territory Management, where you can interact with our development team and post questions and comments. Find us at <https://success.salesforce.com/>.

FY14 Global Sales Territory Territory Hierarchy (Active) [Help for this Page](#) 

[Give Us Feedback](#)

Rules Last Run: 3/14/2014  
Activated: 3/17/2014

[Run All Rules](#) [Archive](#) Tree View ▾

[Collapse All](#) [Expand All](#)

- **FY14 Global Sales Territory (Active)**
  - **Americas**
    - + Canada
    - + Latin America
    - **USA**
      - + East
      - + Midwest
      - **West**
        - **California** [Edit](#) | [Del](#) | [Create Territory](#)
        - + Mountain States
        - + Northwest
- + APAC
- + EMEA
- + Emerging Cloud
- + G100 Accounts

## Beta Limitations

The beta release of Territory Management 2.0:

- Is not supported on Internet Explorer 7.0 or earlier versions.
- Is not integrated with Customizable Forecasts.
- Allows only accounts to be assigned to territories: direct assignment of contacts, opportunities, and cases is not available.
- Allows manual user assignments only. Users cannot be transferred between territories.
- Allows Salesforce Partner Relationship Management and Customer Support portal users to be assigned to territories but does not allow those users to view Territory Management 2.0 objects, as Salesforce standard users can.

### Implement Territory Management 2.0

Use Territory Management 2.0 to manage and maintain your organization's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your organization, and then run reports to assess its impact and make adjustments if necessary.

## Implement Territory Management 2.0

Use Territory Management 2.0 to manage and maintain your organization's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, then assign users and accounts. Roll it out to your organization, and then run reports to assess its impact and make adjustments if necessary.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To manage sales territories:	“Manage Territories”

Before you begin building your territory model, plan your approach. Choose organizing characteristics such as industry, annual revenue, or location information to divide your organization’s accounts into logical segments that work for the way you do business.

### **Enable Territory Management 2.0**

You need to contact salesforce.com Customer Support to get Territory Management 2.0 before you enable the feature in your organization.

### **Define Default Record Access for your Sales Territories**

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

### **Build a Territory Model**

A territory model organizes all the elements of your organization’s territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

### **Assign Users to Territories**

Assign users to the territories they will operate in to sell products and services.

### **Activate a Territory Model**

When you’re satisfied with the structure of your territory model and its territory account assignments, you’re ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

### **Configure Territory Management 2.0 Access for Users**

As part of implementing Territory Management 2.0, you need to make sure your users can access and use its features.

### **Create Custom Report Types for Territory Management 2.0 Reports**

Organizations using Territory Management 2.0 run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers can create the reports they need. See the Salesforce Help for detailed instructions on creating selected reports from these types, as listed here.

## **Enable Territory Management 2.0**

You need to contact salesforce.com Customer Support to get Territory Management 2.0 before you enable the feature in your organization.

User Permissions Needed	
To enable Territory Management 2.0:	“Customize Application”



**Note:** Enabling Territory Management 2.0 (Beta) automatically clears the value (if any) in the `Territory` field on opportunity records in your organization.

1. From Setup, click **Manage Territories > Settings**.
2. Click **Enable Territory Management 2.0**.

## Define Default Record Access for your Sales Territories

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

The standard settings are for accounts and opportunities. If your organization uses Private default internal access for Contacts and Cases, you'll also see options for those objects on this page.

User Permissions Needed	
To create a territory model:	“View Setup and Configuration” “Manage Territories”

1. From Setup, click **Manage Territories > Settings**.
2. Select the default access levels you want for accounts and opportunities.
3. If applicable, select the default access levels for contacts and cases.
4. Click **Save**.

## Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

### Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

### Create a Territory Model Record

The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

### Create Territories

Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

### Create and Preview Territory Account Assignments

You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are created.

## Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

User Permissions Needed	
To create a territory type:	“View Setup and Configuration” “Manage Territories”

Examples of territory types you might wish to create to organize your territories are Named Accounts, Direct Accounts, or Overlay Sales.

1. From Setup, click **Manage Territories > Territory Types**.
2. Click **New Territory Type**.
3. Enter a label and a description. In your description, make sure you clearly indicate what kinds of territories should belong to that type.
4. Click **Save**.

## Create a Territory Model Record

The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

User Permissions Needed	
To create a territory model:	“View Setup and Configuration” “Manage Territories”

1. From Setup, click **Manage Territories > Territory Models**.
2. Click **New Territory Model**.
3. Define the label and description fields.
4. Click **Save**.

## Create Territories

Create territories as you build your organization’s territory model. When you create a territory, it appears on the model’s territory hierarchy.

User Permissions Needed	
To create a territory:	“View Setup and Configuration” “Manage Territories”

1. Open the territory model where you want to create the territory.
2. If you need to, select **Tree View** from the drop-down to show the model’s territory hierarchy, including any existing territories.
3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.
4. On the New Territory page, define the territory: give it a meaningful label, choose its territory type. If the territory requires *different* user access for accounts and opportunities than the *default* user access for those records, define the territory’s user access levels.
5. Click **Save**.

## Create and Preview Territory Account Assignments

You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are created.

Before you commit to your model's account assignments, you should preview them by running assignment rules and related reports while the model is in **Planning** state. When you're satisfied with your planned account assignments, change the model to **Active** state. Then run rules and make manual assignments again.

### Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Territory Management 2.0 to assign accounts with those characteristics to that territory automatically. If your territory is in **Planning** state, running rules lets you *preview* account assignments. If your territory is in **Active** state when you run rules, accounts are assigned to territories according to your rules.

### Assign Accounts to Territories Manually

Accounts that are not assigned to territories by rules can be assigned to territories manually. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

### Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in **Planning** state. Also verify your manual assignments.

## Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Territory Management 2.0 to assign accounts with those characteristics to that territory automatically. If your territory is in **Planning** state, running rules lets you *preview* account assignments. If your territory is in **Active** state when you run rules, accounts are assigned to territories according to your rules.

User Permissions Needed	
To create rules within your territories:	<ul style="list-style-type: none"> <li>“Customize Application”</li> <li>“Manage Territories”</li> <li>“View All” on accounts</li> </ul>

1. From the territory model hierarchy, open the territory where you want to create a rule.
2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.
3. On the rule edit page, enter a name for the new rule and define selection criteria.
4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.
5. If you want the rule to run automatically whenever a user creates or edits an account, select the **Active** checkbox.
6. Click **Save** to save the rule and return to the territory detail page.
7. (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**.  
You'll receive an email when the process is complete.

Rules can work together within and across territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in far northern California to the Oregon territory.

## Assign Accounts to Territories Manually

Accounts that are not assigned to territories by rules can be assigned to territories manually. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

User Permissions Needed	
To assign accounts manually within your territories:	“View Setup and Configuration” “Manage Territories”

1. From the territory model hierarchy, open the territory where you want to assign an account.
2. On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your organization's accounts.
3. In the Available related list, select the checkbox for each account you want to assign. If you need to view more records, click **More** beneath the list.  
Each selected account appears in the Selected related list.
4. Click **Assign**.

## Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in Planning state. Also verify your manual assignments.

User Permissions Needed	
To preview territory model account assignments:	“View Setup and Configuration” “Manage Territories”



**Important:** To protect data quality, you cannot modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
2. Verify that the model is in Planning state.
3. Click **Run All Rules**.  
When rules are finished running, we'll send an email to let you know. Processing may take some time, depending on the size and complexity of your organization.
4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.
5. On the territory detail page, click **View Accounts** to see assigned accounts. The Method column indicates how each account was assigned: by a rule or manually.



### Note:

If you make changes to the rules for a territory, you must run rules again to view those changes. In this case, you may want to run rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

## Assign Users to Territories

Assign users to the territories they will operate in to sell products and services.

User Permissions Needed	
To assign users to territories:	“View Setup and Configuration” “Manage Territories”

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory’s detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

## Activate a Territory Model

When you’re satisfied with the structure of your territory model and its territory account assignments, you’re ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

User Permissions Needed	
To activate a territory model:	“View Setup and Configuration” “Manage Territories”



**Important:** Only one model can be in the `Active` state at one time in your organization, and you can only activate a model that is in the `Planning` state. After activating a model, you cannot reset it to `Planning` state: you can only set it to `Archived` state.

1. If you need to, preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.  
The model state changes to `Activating` while Salesforce processes your request. Activation may take some time, depending on the size and complexity of your organization. When the process is complete, we’ll send you an email to let you know.

## Configure Territory Management 2.0 Access for Users

As part of implementing Territory Management 2.0, you need to make sure your users can access and use its features.

User Permissions Needed	
To assign user permissions:	“Manage Users”
To create, edit, and delete page layouts:	“Customize Application”

1. Make sure you understand how permissions affect territory model and record access in Territory Management 2.0.
2. Assign user permissions as needed.
3. Add the Assigned Territories related list to your account page layouts.

### How Permissions Affect Feature and Data Access in Territory Management 2.0

When implementing Territory Management 2.0, make sure you understand how the feature's permissions affect administration and provide access to records and data.

## How Permissions Affect Feature and Data Access in Territory Management 2.0

When implementing Territory Management 2.0, make sure you understand how the feature's permissions affect administration and provide access to records and data.

Make sure user permissions provide the appropriate level of access for users. For example, you might want Sales Operations managers and selected Sales managers to be able to manage territories. If so, assign them the Manage Territories permission. Anyone who will also create account assignment rules also needs the View All permission on Accounts.

Users who need to:	Require these permissions:
<ul style="list-style-type: none"> <li>• Create territory models and all related records (such as territory types).</li> <li>• View and manage territory models in all states: Planning, Active, and Archived.</li> <li>• Activate, archive, and delete territory models.</li> <li>• View territory information on territory-assigned account records for territories in models in <i>all</i> states (Planning, Active, and Archived).</li> </ul>	Manage Territories
<ul style="list-style-type: none"> <li>• Create account assignment rules.</li> </ul>	Manage Territories AND View All on Accounts   <b>Note:</b> Which fields are available for account assignment rules depends on account field-level security settings, if any. For example, a user has the appropriate permissions for creating account assignment rules, but her profile prevents her from viewing the Account object's Annual Revenue field. She will not be able to create account assignment rules that include that field.
<ul style="list-style-type: none"> <li>• View the Salesforce Setup tree, including the Manage Territories section.</li> <li>• View the territory model in <i>Active</i> state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy).</li> <li>• View all account records assigned to territories in the <i>Active</i> territory model.</li> <li>• View territory information on territory-assigned account records for territories in models in the <i>Active</i> state only.</li> </ul>	View Setup and Configuration   <b>Note:</b> View Setup and Configuration is enabled by default for the Standard User profile.

## Create Custom Report Types for Territory Management 2.0 Reports

Organizations using Territory Management 2.0 run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers can create the reports they need. See the Salesforce Help for detailed instructions on creating selected reports from these types, as listed here.

User Permissions Needed	
To create or update custom report types:	“Manage Custom Report Types”
To delete custom report types:	“Modify All Data”

1. Make sure you’re familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types relating these objects and configuring them where necessary. Make all fields available for reporting. Add each report to the Territory Management report type category. Provide a clear name and description for each report type so users who create reports can understand which one to use for their needs.

Report (*Documented in the Salesforce Help)	A (Primary Object)	B	C
*Accounts assigned to territories	Accounts	Territories Select “A” records must have related “B” records.	–
Accounts not assigned to territories	Accounts	Territories Select “A” records may or may not have related “B” records.	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select “B” records must have related “C” records.
*Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select “B” records may or may not have related “C” records.
Users assigned to territories	Users	Territories Select “A” records must have related “B” records.	–
*Users not assigned to territories	Users	Territories Select “A” records may or may not have related “B” records.	–
*Territories with assigned users	Territory Models	Territories	Users Select “B” records must have related “C” records.
Territories without assigned users	Territory Models	Territories	Users Select “B” records may or may not have related “C” records.

Report (*Documented in the Salesforce Help)	A (Primary Object)	B	C
*Summarizable account information by territory	Accounts	Territories	–
<b>Select Each “A” record must have at least one related “B” record.</b>			

3. Deploy the report types you want to make available to users.
4. Let users know that they can create reports using these custom report types.

## Salesforce for Outlook

We’re continuing to help users be more productive when they use the Salesforce for Outlook Side Panel. We’re also giving you more security control in Salesforce for Outlook.

Available in: **All Editions**

Before we dive into our latest features, it’s a good time to consider migrating any remaining folks in your organization who use Connect for Outlook to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft® Exchange Online—the Microsoft -hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all Microsoft® Outlook® contacts, events, and tasks
- Automatically scheduled sync cycles

Take a look at our latest enhancements to Salesforce for Outlook and the side panel.

### **Requirements for Installing Salesforce for Outlook v2.5.0 and Later**

Your users must first uninstall earlier versions of Salesforce for Outlook from the Windows® Control Panel before installing v2.5.0.

### **Salesforce Side Panel Available in Contact Manager and Group Editions**

Now all Salesforce for Outlook users have access to the side panel.

### **Create More Kinds of Salesforce Records Directly from the Side Panel**

If your Salesforce for Outlook users generate sales prospects while they’re working in Microsoft® Outlook®, they’ll love that they now can create more kinds of records directly from the side panel using the Salesforce Side Panel Publisher.

### **Customize Side Panel Publisher Menus for Different Users**

Depending on your Salesforce edition, you can create multiple publisher layouts for the Salesforce Side Panel and customize each layout with different sets of Publisher Actions. This helps users with different responsibilities create different kinds of records directly from the side panel.

### **Users Can Download Salesforce for Outlook without Administrative Support**

Now your users can download Salesforce for Outlook and access select features with less work on your part.

### **Schedule Logouts for Salesforce for Outlook with Connected Apps**

If your organization is required to comply with a security policy that periodically logs your users out of their applications, you'll love that refresh token expirations you set in Connected Apps now also apply to Salesforce for Outlook.

## **Requirements for Installing Salesforce for Outlook v2.5.0 and Later**

Your users must first uninstall earlier versions of Salesforce for Outlook from the Windows® Control Panel before installing v2.5.0.

If your users' systems don't meet all of the Salesforce for Outlook system requirements, do not upgrade to v2.5.0 or later. Otherwise, your users will not be able to use Salesforce for Outlook or any of its features. For more details, see "Salesforce for Outlook System Requirements" in the Salesforce Help.

For help uninstalling programs from Windows, refer to Microsoft Support, or contact your organization's Windows administrator.

## **Salesforce Side Panel Available in Contact Manager and Group Editions**

Now all Salesforce for Outlook users have access to the side panel.

Contact Manager and Group Editions can now:

- View Salesforce contacts and leads related to their Microsoft® Outlook® emails.
- Create records directly in the side panel with the side panel publisher.
- Add Microsoft® Outlook® emails and events to Salesforce records.

Learn more in "Available Salesforce for Outlook Features by Salesforce Edition" in the Salesforce Help.

## **Create More Kinds of Salesforce Records Directly from the Side Panel**

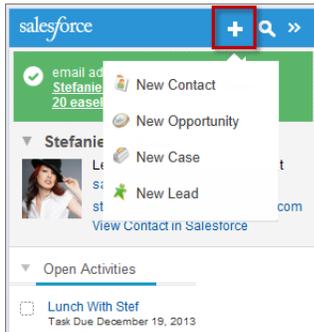
If your Salesforce for Outlook users generate sales prospects while they're working in Microsoft® Outlook®, they'll love that they now can create more kinds of records directly from the side panel using the Salesforce Side Panel Publisher.

<b>User Permissions Needed</b>	
To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To create new records from the Salesforce Side Panel:	"Create" and "Read" on all objects that users create records from AND "Visible" on all required fields in records that users create

We're packing even more functionality into the side panel by making the create case feature even better. We're introducing the Salesforce Side Panel Publisher, which lets users create not only cases, but also accounts, contacts, leads, opportunities, and custom object records—all directly from the side panel.

Here's how users create records from the side panel publisher.

1. After selecting an email in Microsoft Outlook®, click  and select the type of record that you want to create.



2. Provide details that are relevant to the record.
3. Click  to save the record.

Keep in mind that email attachments aren't included in the new records.

You must set up the side panel publisher for your users by adding publisher actions to a publisher layout. The process for setting up your users depends on your Salesforce edition. During setup, you can also choose which fields appear on record detail pages in your users' side panel menus. Those fields can be different from the ones you've chosen for record detail pages in Salesforce.

- Contact Manager, Group, or Professional Edition users create `Create a Record` global actions, add them to their Global Publisher Layout, and assign the layout to the appropriate user profile or profiles.
- Enterprise, Performance, Unlimited, or Developer Editions users create `Create a Record` global actions, add them to one or multiple Outlook Side Panel Publisher Layouts, and assign those layouts to the appropriate user profile or profiles.

For more details about the new Outlook Side Panel Publisher Layouts feature, see the next section.

## Customize Side Panel Publisher Menus for Different Users

Depending on your Salesforce edition, you can create multiple publisher layouts for the Salesforce Side Panel and customize each layout with different sets of Publisher Actions. This helps users with different responsibilities create different kinds of records directly from the side panel.

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

User Permissions Needed	
To display the Salesforce Side Panel:	“Side Panel” in Outlook configurations
To set up global actions:	“Customize Application”
To view side panel publisher layouts:	“View Setup”

For example, you might want your sales managers to be able to create new account, case, contact, and opportunity records from the side panel, but your service reps to be able to create only new case records. You also might want your sales managers to have more fields to complete in the case record detail page than your service reps do.

As administrator, you'll customize side panel publisher menus by:

1. Creating a `Create a Record` global action for each publisher action you want to be available in your users' side panel publisher menus, and adding the appropriate fields for those actions. If you've already set up `Create a Record` global actions to use in other Salesforce features, you don't need to create them for the same kinds of records again—they're already available to add to the side panel publisher.
2. Creating a new Outlook Side Panel Publisher Layout from **Setup > Desktop Administration > Outlook Configurations**.
3. Editing the new layout to add the publisher actions that you want to be available to a user or a group of users.
4. Assigning the layout to a user profile or profiles that includes the group of users you want to use this publisher layout.

Create additional layouts with different sets of publisher actions for other groups of users.

## Users Can Download Salesforce for Outlook without Administrative Support

Now your users can download Salesforce for Outlook and access select features with less work on your part.

Salesforce for Outlook available in: **All Editions**

Outlook Configurations available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

User Permissions Needed	
To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To enable or disable Email to Salesforce:	"Modify All Data"

In the past, you had to grant your users access to download Salesforce for Outlook by creating an Outlook<sup>®</sup> configuration and adding those users to it. Now all Salesforce users automatically have access to download Salesforce for Outlook, and can take advantage of these Salesforce Side Panel features:

- Viewing Salesforce contacts and leads related to emails in users' Outlook Inboxes.
- Viewing Salesforce activities, opportunities, and cases associated to those contacts and leads.

Users who have enabled the My Email to Salesforce feature can also save Outlook<sup>®</sup> emails to Salesforce, and add an email or event to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.

If you're using Professional, Enterprise, Performance, Unlimited, or Developer Editions of Salesforce, you can still control the access your users have to Salesforce for Outlook features by editing your Outlook<sup>®</sup> configurations, just as you have in the past. For example, to prevent users from downloading Salesforce for Outlook, add them to an Outlook<sup>®</sup> configuration in which all features are disabled.

To access your Outlook<sup>®</sup> configurations, from Setup, click **Desktop Administration > Outlook Configurations**.

## Schedule Logouts for Salesforce for Outlook with Connected Apps

If your organization is required to comply with a security policy that periodically logs your users out of their applications, you'll love that refresh token expirations you set in Connected Apps now also apply to Salesforce for Outlook.

User Permissions Needed	
To display the Salesforce Side Panel:	“Side Panel” in Outlook configurations
To create, update, or delete a Connected App:	“Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”

If you have already scheduled refresh token expirations for your Salesforce application users through Connected Apps, you’ll notice that Salesforce for Outlook users are now logged out on the same schedule. Salesforce for Outlook won’t run scheduled syncs or allow a user to access Salesforce data from the side panel until the user logs back into Salesforce manually. Users will be prompted to log back in again when a scheduled sync fails or a user tries to use the side panel.

## Salesforce Console for Sales

The Salesforce Console for Sales is a dashboard-like app designed to help you access sales intelligence quickly with fewer clicks and less scrolling.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

### Salesforce Console Enhancements

The Salesforce Console for Sales and the Salesforce Console for Service share new features that help administrators and developers customize the console for users. For more information, see [Salesforce Console for Service](#) on page 176.

## Activities

Events and tasks are the building blocks of sales productivity. We’ve made enhancements that boost your sales teams’ edge over the competition, along with updates to improve performance and usability.

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

### **Default Event Action Lets Users Create Events from Any Publisher**

We’ve added New Event to the default actions on the global publisher layout. Now users can create events on the Home tab, the Chatter tab, and record detail pages, without administrator setup.

### **Use Formulas to Track and Validate Activities by Date or by Date and Time**

Now you can include the date or the date and time of an activity in a custom formula field or a validation rule. Set a validation rule based on the due date of an event or a task, or track sales reps’ appointments or approaching task due dates.

### **Report on Sales Reps’ Meetings with Customers**

Previously, reports on users’ activities included only meeting organizers, not additional sales reps attending meetings as invitees. Now, using a new Activity Relationship object, your sales managers can get insight into how much time every sales rep spends with leads and contacts. To generate a report of attendees by meeting, create a custom report and relate the User object to the Activity Relationship object.

### Use Additional Activities Fields to Run More Comprehensive Reports

Now you can include more details—such as related contacts and accounts, invitees, and task status—in custom reports. The new fields are available when you use the new `ActivityRelationships` object to define a relationship between users and activities.

### Status and Account Fields Make Task Lists More Useful

We've added the fields `Status` and `Account` to the task lists on the Home tab and in the calendar day view. In the lists, users can now see each task's status and the account it's related to.

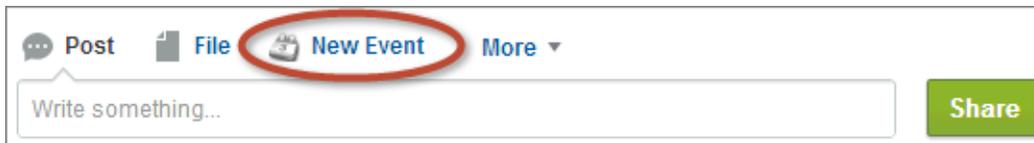
### Other Changes in Activities

We've made some additional changes to Salesforce events and tasks.

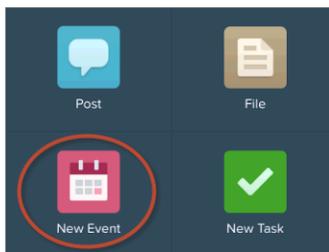
## Default Event Action Lets Users Create Events from Any Publisher

We've added `New Event` to the default actions on the global publisher layout. Now users can create events on the Home tab, the Chatter tab, and record detail pages, without administrator setup.

Here is the `New Event` action in the Salesforce app:



And here is the action in Salesforce1:



## Use Formulas to Track and Validate Activities by Date or by Date and Time

Now you can include the date or the date and time of an activity in a custom formula field or a validation rule. Set a validation rule based on the due date of an event or a task, or track sales reps' appointments or approaching task due dates.

Suppose that your sales managers want to remind reps to follow up on five-day-old leads, or that you want to prevent reps from marking tasks closed before they're due. Use the `ActivityDate` field to create a validation rule based on all-day events or on tasks.

This example shows the `ActivityDate` field selected in the Formula Builder:

The screenshot shows the Formula Builder interface. On the left, a list of fields is displayed under the 'Activity' object, including \$Api, \$Organization, \$Profile, \$System, \$User, and \$UserRole. The 'Date' field is selected and highlighted in blue. On the right, a confirmation box states 'You have selected: ActivityDate' with 'Type: Date/Time' and 'API Name: ActivityDate'. An 'Insert' button is visible below the confirmation box.

Or let's say that sales managers want to compare the number of morning and afternoon appointments that sales reps make with customers. Use the ActivityDateTime field to create a custom formula based on events with a date and time. (The Task object doesn't support this field.)

This example shows the ActivityDateTime field selected in the Formula Builder:

The screenshot shows the Formula Builder interface. On the left, a list of fields is displayed under the 'Activity' object, including Owner ID, Priority, Private, Public, Show Time As, Status, Subject, Task, and Time. The 'Time' field is selected and highlighted in blue. On the right, a confirmation box states 'You have selected: ActivityDateTime' with 'Type: Date/Time' and 'API Name: ActivityDateTime'. An 'Insert' button is visible below the confirmation box.

For more information, see "Work with Formulas in Report Builder" in the Salesforce Help.

## Report on Sales Reps' Meetings with Customers

Previously, reports on users' activities included only meeting organizers, not additional sales reps attending meetings as invitees. Now, using a new Activity Relationship object, your sales managers can get insight into how much time every sales rep spends with leads and contacts. To generate a report of attendees by meeting, create a custom report and relate the User object to the Activity Relationship object.

This example shows each sales rep's past or future customer meetings to discuss opportunities.

	Date	Subject	Contact	Opportunity	Relation Count
<input type="checkbox"/>	Full Name: <a href="#">Karen Adams</a> (3 records)				
	4/24/2014	<a href="#">Discuss rollout</a>	<a href="#">Arnold Adams</a>	<a href="#">ABC - 10 Laptops</a>	1
	4/25/2014	<a href="#">Planning</a>	<a href="#">Abby Anderson</a>	<a href="#">Arbuckle - 400 Laptops</a>	1
	4/21/2014	<a href="#">Introductions</a>	<a href="#">Sandra Deely</a>	<a href="#">Acme - 600 Desktops</a>	1
<input type="checkbox"/>	Full Name: <a href="#">Yuko Ishikawa</a> (2 records)				
	4/24/2014	<a href="#">Discuss rollout</a>	<a href="#">Arnold Adams</a>	<a href="#">ABC - 10 Laptops</a>	1
	4/21/2014	<a href="#">Introductions</a>	<a href="#">Sandra Deely</a>	<a href="#">Acme - 600 Desktops</a>	1
<b>Grand Totals (5 records)</b>					



**Note:** If you haven't enabled Shared Activities, then custom reports based on activity relationships don't include event organizers along with invitees, and they don't show events to which no one has been invited.

For more information, see "Report on Sales Reps' Meetings with Customers" in the Salesforce Help.

## Use Additional Activities Fields to Run More Comprehensive Reports

Now you can include more details—such as related contacts and accounts, invitees, and task status—in custom reports. The new fields are available when you use the new `ActivityRelationships` object to define a relationship between users and activities.

First use the new `ActivityRelationships` object to create a custom report type, and then use that report type to create a report that includes the fields. The new fields include two status fields: one for invitee status and one for task status.

- Is Parent
- Is What
- Is Invitee
- Date Responded
- Invitee Comment
- Invitee Status
- Task Status

## Status and Account Fields Make Task Lists More Useful

We've added the fields `Status` and `Account` to the task lists on the Home tab and in the calendar day view. In the lists, users can now see each task's status and the account it's related to.

Complete	Date	Status	Subject	Name	Related To	Account
X	2/28/2014	Not Started	<a href="#">Make follow-up call</a>	<a href="#">Sandra Deely</a>	<a href="#">Acme - 600 laptops</a>	<a href="#">Acme Inc.</a>

## Other Changes in Activities

We've made some additional changes to Salesforce events and tasks.

### Security is Improved in the Multi-User Calendar View

In the multi-user calendar view, a user who doesn't have permission to view an event in another user's calendar now sees only the event's start and end time. The user no longer sees the subject or other event details in the calendar overlay:

	Monday	Tuesday	Wednesday	Thursday	Friday
<input type="checkbox"/> Invite	2 +	3 +	4 +	5 +	6 +
<input type="checkbox"/> Chang, Jin					
<input type="checkbox"/> Ishikawa, Yuko					

Likewise, if you've enabled the option to show event details in the calendar, the user no longer sees the subject or other event details in the calendar itself:

	Monday	Tuesday	Wednesday	Thursday	Friday
<input type="checkbox"/> Invite	2 +	3 +	4 +	5 +	6 +
<input type="checkbox"/> Chang, Jin	Time: All-Day Event Start: 6/2/2014 End: 6/2/2014				Time: 9:00 AM-12:00 PM Start: 6/6/2014 9:00 AM End: 6/6/2014 12:00 PM
<input type="checkbox"/> Ishikawa, Yuko	Time: All-Day Event Start: 6/2/2014 End: 6/2/2014				

### Custom Reports Based on Activity Relationships Not Fully Supported without Shared Activities

If you haven't enabled Shared Activities, then custom reports based on activity relationships don't include event organizers along with invitees, and they don't show events to which no one has been invited.

### API Objects Changed

For details about changes to the objects ActivityHistory, Event, OpenActivity, and Task, see [Changed Objects](#) on page 294.

## Customizable Price Book Entries

Administrators can customize price book entries in the user interface.

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

User Permissions Needed	
To view setup options:	"View Setup and Configuration"
To customize your organization:	"Customize Application"
To view price book entries:	"Read" on price books AND "Read" on products
To create or change standard price book entries:	"Create" or "Edit" on products
To create or change custom price book entries:	"Create" or "Edit" on price books

User Permissions Needed	
To clone price book entries:	“Create” on price books
To delete price book entries:	“Edit” on price books

The three types of product-related records are products, price books, and price book entries. Products were customizable when they were first introduced. Price books were made customizable in Summer '13. With this release (Summer '14), price book entries are customizable! You can now create fields, page layouts, and validation rules for your price book entries in Setup.

Let's look at some of the ways that you can take advantage of these enhancements.

- **Easier integration:** You can now create a custom field to store an external ID in each price book entry record, which enables efficient import, export, and synchronization with an external source.
- **More flexibility:** You can now create custom fields to store the validity of your price book entries by setting effective start and end dates. Also, you can create custom fields to help drive calculated pricing or discounts on your opportunities according to business logic.
- **Data quality:** You can now improved the data quality of price book entry records by preventing users from saving incorrect data through the use of validation rules.
- **More control:** To address the business needs of your different business units, you can create multiple page layouts to control the fields that users see on price book entry detail and edit pages.

Price Book Entry now exists in Setup! From Setup, click **Customize > Price Books > Price Book Entries**.



**Note:** The price book entry object doesn't support the creation of roll-up summary fields. In addition, the price book entry object isn't available as related lookups from other objects.

Users can now view and edit price book entries. Every field on the detail page maps to an underlying field of the corresponding PricebookEntry standard object. One field is added to the user interface that is not on the standard object—the Standard Price field, which is a derived field that stores the standard price from the product's standard price book.

Price Book Entry  
**Laptop X200**

[Back to List: Price Book Entries](#) [Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

**Price Book Entry Detail** [Edit](#) [Delete](#) [Clone](#)

Product	<a href="#">Laptop X200</a>	Active	<input checked="" type="checkbox"/>
Price Book	<a href="#">Domestic Price List</a>	Product Code	X200
Use Standard Price	<input type="checkbox"/>	Standard Price	USD 800.00
List Price	USD 850.00	Currency	USD
Created By	<a href="#">Test User</a> , 4/22/2014 5:39 PM	Last Modified By	<a href="#">Test User</a> , 4/22/2014 5:39 PM

[Edit](#) [Delete](#) [Clone](#)



**Note:** There are no field dependencies for price book entry fields in the user interface. If the Use Standard Price checkbox is removed from the page layout and this checkbox is selected for a price book entry, users won't be able to edit the list price because the List Price field will be disabled and can't be enabled on this page.

You can access a price book entry in various ways. Click **View** or **Edit** next to an entry in any of the following locations.

- From the price book detail page, in the Products related list
- From the product detail page, in the Standard Price related list
- From the product detail page, in the Price Books related list
- From the price book entry list view

This image shows a price book with two price book entries listed in the Products related list of a custom price book.

Price Book  
**Domestic Price List**

[Back to List: Price Books](#) [Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Products \[2\]](#) | [Price Book History \[1\]](#)

**Price Book Detail** [Edit](#) [Delete](#) [Clone](#) [Archive](#)

Price Book Name	Domestic Price List	Active	<input checked="" type="checkbox"/>
Description		Is Standard Price Book	<input type="checkbox"/>
Created By	<a href="#">Test User</a> , 4/22/2014 5:39 PM	Last Modified By	<a href="#">Test User</a> , 4/22/2014 5:39 PM

[Edit](#) [Delete](#) [Clone](#) [Archive](#)

**Products** [Add](#) [Edit All](#)

Action	Product Name	Product Code	List Price	Active
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Laptop X200</a>	X200	USD 850.00	<input checked="" type="checkbox"/>
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Printer P100</a>	P100	USD 250.00	<input checked="" type="checkbox"/>

**Price Book History**

Date	User	Action
4/22/2014 5:39 PM	<a href="#">Test User</a>	Created.

1. In the Products related list, each row is a price book entry.
2. Click **View**, **Edit**, or **Del** next to each price book entry to view, edit, or delete the entry.

## Considerations for Custom Fields in Price Book Entries

The following considerations apply only to price book entries that were created or edited by using the Salesforce user interface. There is no impact to price book entries that were created or edited by using Data Loader or the API.

You can add standard or list prices only through the multiline add pages (the Add Standard Price page and the Add List Price page). These pages do not support custom fields. To add standard or list prices and populate custom fields, you must add the price book entry via the multiline add page and then update the custom fields via the price book entry edit page.

You can edit standard or list prices in either of the following ways: through the multiline edit pages (Edit Standard Price and Edit List Price) or the Price Book Entry Edit page. Similar to the multiline add pages, the multiline edit pages do not support custom fields. You can only edit custom fields that are associated to your standard or list prices via the Price Book Entry edit page.



**Note:** If your price book entry object has custom fields set as Required, you can't create price book entries in the Salesforce user interface. You can create price book entries only by using Data Loader or the API.

## Generate Orders (Pilot)

Automatically create an order with order products from an opportunity or quote. You can also generate and relate the order to a contract.

Generate Orders is available in: **Enterprise, Performance, Unlimited, and Developer** Editions



**Note:** Generate Orders is currently available through a pilot program. Contact salesforce.com to enable this feature for your organization. Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Leveraging the new standard lookup fields in Summer '14 and the declarative power of Flow, the Generate Orders package gives you the ability to automatically create an order and order products from the line items on an opportunity or quote. It can even create and link a contract if needed. Generate Orders helps you increase value in several ways:

- **Increase Productivity**—Your sales and operations teams don't want to waste time keying in orders. Now you can automatically generate a complete order with the click of a button. The orders are automatically linked to your opportunities, quotes, contracts, and accounts, so you immediately have a complete picture of the closed deal.
- **Reduced Errors**—Ensure that your orders exactly match your opportunities or quotes. The products, sales prices, and quantities are automatically carried over to the order just as presented to the customer. You can be sure that your customers get exactly what they ordered.
- **Streamlined Process**—Create orders quickly and accurately.
  - ◇ Process your orders in record time. As soon as you close the deal, the order can be created and ready to be fulfilled, and your customers can start using your products and services without delay.
  - ◇ Your back office gets timely and accurate data.
  - ◇ It's easy to modify your flow as your business changes.

The Generate Orders package comes with a set of flow templates and custom buttons which you can tailor to exactly match your business requirements. You can easily add field mappings for additional standard or custom fields, or even custom objects. When you're done, link the flow to a custom button or workflow rule to streamline the order create process for your sales and operations teams.



**Note:** Flow trigger workflow actions and trigger-ready flows are available through a separate pilot program.

## A Simple Generate Order Example

Here we see an opportunity detail page modified to use Generate Orders. (1) Generate the order from a custom button or (2) from a workflow rule, for example when the Stage is set to Closed Won.

**Opportunity Detail** [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Generate Order](#) 1

Opportunity Owner	<a href="#">Test User (Change)</a>	Close Date	5/20/2014
Opportunity Name	Acme - 500 Widgets	Stage	Closed Won <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span>
Account Name	Acme	Probability (%)	100%
Type		Amount	\$31,650.00
Primary Campaign Source		Contract	

► **Additional Information**

► **System Information**

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Generate Order](#)

**Products (Standard Price Book)** [Add Product](#) [Edit All](#) [Choose Price Book](#) [Sort](#) [Products \(Standard Price Book\) Help](#) [?](#)

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
<a href="#">Edit</a>   <a href="#">Del</a>	Processor	3.00	\$550.00			\$550.00
<a href="#">Edit</a>   <a href="#">Del</a>	Widget	500.00	\$60.00			\$65.00

**Quotes** [New Quote](#) [Quotes Help](#) [?](#)

Action	Quote Number	Quote Name	Syncing	Expiration Date	Discount	Grand Total	Created By
<a href="#">Edit</a>   <a href="#">Del</a>	00000016	Q500	<input type="checkbox"/>	5/21/2014	0.00%	\$31,650.00	Test User, 5/21/2014 4:52 PM

**Orders** [Orders Help](#) [?](#)

No records to display

You can modify the flow to (3) also link a contract and (4) create the order automatically.

**Opportunity Detail** [Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Generate Order](#)

Opportunity Owner	<a href="#">Test User (Change)</a>	Close Date	5/20/2014
Opportunity Name	Acme - 500 Widgets	Stage	Closed Won
Account Name	Acme	Probability (%)	100%
Type		Amount	\$31,650.00
Primary Campaign Source		Contract	00000220 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span>

► **Additional Information**

► **System Information**

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Generate Order](#)

**Products (Standard Price Book)** [Add Product](#) [Edit All](#) [Choose Price Book](#) [Sort](#) [Products \(Standard Price Book\) Help](#) [?](#)

Action	Product	Quantity	Sales Price	Date	Line Description	List Price
<a href="#">Edit</a>   <a href="#">Del</a>	Processor	3.00	\$550.00			\$550.00
<a href="#">Edit</a>   <a href="#">Del</a>	Widget	500.00	\$60.00			\$65.00

**Quotes** [New Quote](#) [Quotes Help](#) [?](#)

Action	Quote Number	Quote Name	Syncing	Expiration Date	Discount	Grand Total	Created By
<a href="#">Edit</a>   <a href="#">Del</a>	00000016	Q500	<input type="checkbox"/>	5/21/2014	0.00%	\$31,650.00	Test User, 5/21/2014 4:52 PM

**Orders** [Orders Help](#) [?](#)

Action	Order Number	Status	Order Start Date	Contract Number	Order Amount
<a href="#">Edit</a>	00000216 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>	Activated	5/20/2014	00000220	\$31,650.00

(5) The order is automatically linked to the opportunity or quote, and (6) the products, prices, and quantities are automatically pulled and added to the order.

**Order Detail** [Edit] [Clone] [Delete] [Activate]

Order Number	00000216	Order Record Type	Standard
Account Name	Acme	Order Start Date	5/20/2014
Contract Number	00000220	Order Type	
Status	Draft	Order Amount	\$31,650.00
Opportunity	Acme - 500 Widgets	Customer Authorized By	
Quote	Q500	Company Authorized By	
Activated Date		Original Order	
Activated By			
Description			
Billing Address	10 Main Rd. New York, NY 31349 USA	Shipping Address	10 Main Rd. New York, NY 31349 USA
Created By	Test User, 5/21/2014 5:02 PM	Last Modified By	Test User, 5/21/2014 5:10 PM

[Edit] [Clone] [Delete] [Activate]

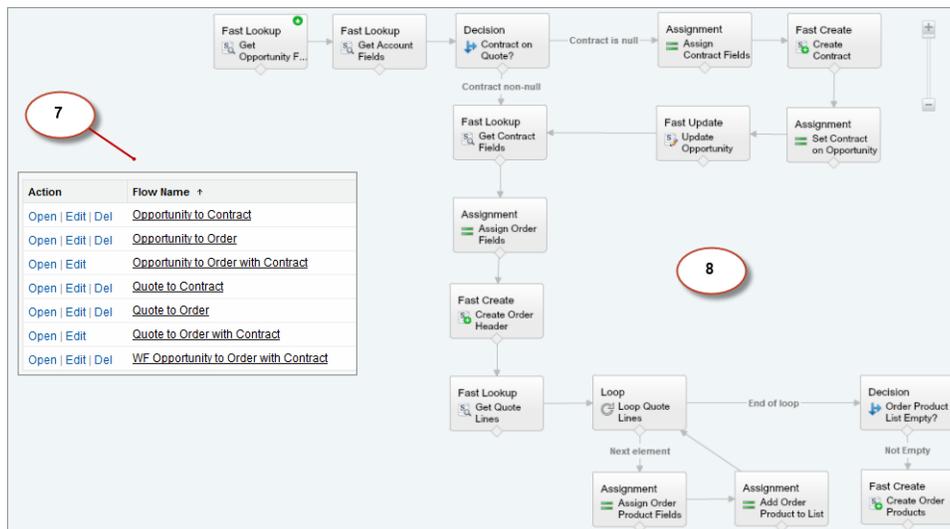
**Order Products (Standard Price Book)** [Add Product] [Edit All] [Order Products (Standard Price Book) Help ?]

Action	Product	Product Code	Quantity	Available Quantity	Unit Price	Total Price	Line Description
[Edit]   [Del]	Processor	-	3.00	3.00	\$550.00	\$1,650.00	
[Edit]   [Del]	Widget	-	500.00	500.00	\$60.00	\$30,000.00	

## How Generate Orders Works

Generate Orders is a set of flow templates that you can install and customize to automatically create an order with order products from an opportunity or quote, and also generate and relate the order to a contract.

Every customer has different business requirements for how and when orders should be created, as well as the information that needs to be stored on orders. Flow is a great tool to convert opportunities or quotes into orders because it provides a declarative way to create and maintain the logic and to create or update records in Salesforce. (7) select the flow template that matches your requirements, and (8) customize the flow's steps as necessary. No coding required! As your business changes, you can easily modify the flow to accommodate your new process and data requirements.



These flow templates retrieve selected data from the opportunity or quote and account that's used to create the orders and order products. Depending on the template you use, the flow could also create a contract and relate it to the opportunity or quote. The flow creates an order, looks up the opportunity products or quote line items, and creates an order product for each line. You can modify one or more of these templates to:

- Retrieve additional fields from other objects and map them to fields on the contract, order, or order products being created.
- Include or exclude certain opportunity products or quote lines to be used for generating order products.
- Create records for other objects and relate them to the newly created records.

# Other Changes in the Sales Cloud

Learn about other changes that affect your sales teams.

## Territory Field Removed on Accounts for Organizations Using Territory Management 2.0 (Beta)

For organizations using Territory Management 2.0 (Beta), the `Territories` field is no longer available on Accounts. Territory Management 2.0 offers a related list called Assigned Territories that you can add to account page layouts. The Assigned Territories related list provides information on territories the account is assigned to, including the territory model. It includes Territory, Territory Model, Model State, Assignment Date, and Method fields. If your organization uses Territory Management 2.0 (Beta), you'll find implementation details in these release notes.

## Territory Field Value Cleared on Opportunity Records for Organizations Enabling Territory Management 2.0 (Beta)

Enabling Territory Management 2.0 (Beta) automatically clears the value (if any) in the `Territory` field on opportunity records in your organization.

## Custom Formula Fields on Accounts

You can now insert Person Contact ID fields into formulas when creating custom formula fields for person accounts. When using the Advanced Formula editor, select `Contact ID` to insert a Person Contact ID into a formula. When creating a formula manually, add `PersonContactID` to reference the Person Contact ID field. Previously, the Person Contact ID field was not available for person accounts.

## New Field on Opportunities

The Opportunity object has a new field: `Contract`.

## New Fields on Orders

The Order object has two new fields: `Opportunity` and `Quote`.

## New Field on Order Product

The Order Product object has a new field: `Quote Line Item`.

## New Field on Quotes

The Quote object has a new field: `Contract`.

## Users Can Associate Records Related to Pipeline with Records Related to Sales in Progress

Help your sales teams identify relationships between records they use to increase pipeline (opportunities and quotes) and records they use to manage sales in progress (orders and contracts). A single record may have multiple other records associated with it. For example, when a sales representative creates multiple orders based on an existing opportunity, she can relate all of those orders to that opportunity by entering the opportunity in the order's `Opportunity` field.

In the following screenshot, the sales representative relates order 00000105 to opportunity Acme - 1,200 Widgets.

Order Detail		Edit	Clone	Delete	Activate
Order Number	00000105	Status	Draft		
Order Start Date	4/1/2014	Account Name	Acme		
Order Amount	\$0.00	Contract Number	00000100		
		Opportunity	Acme - 1,200 Widgets		
Created By	Admin User, 4/1/2014 8:44 PM	Last Modified By	Admin User, 4/4/2014 6:30 PM		

That order then appears in the opportunity's Orders related list.

Opportunity Detail						
Opportunity Owner		Admin User <a href="#">[Change]</a>		Close Date		10/11/2011
Opportunity Name			Acme - 1,200 Widgets		Stage Value Proposition	
<b>Orders</b>						<a href="#">Orders Help ?</a>
Action	Order Number	Status	Order Start Date	Contract Number	Order Amount	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00000107</a>	Draft	4/1/2014	<a href="#">00000100</a>	\$50.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00000106</a>	Draft	4/1/2014	<a href="#">00000100</a>	\$200.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">00000105</a>	Draft	4/1/2014	<a href="#">00000100</a>	\$200.00	

Your sales teams can relate the objects listed here. Follow the steps to set up this feature for each affected object.

To relate	Complete these steps
Opportunities to a contract	<ol style="list-style-type: none"> <li>1. On Opportunity page layouts, add the <code>Contract</code> field.</li> <li>2. On Contract page layouts, add the Opportunities related list. Users can create opportunities directly from the Opportunities related list on a contract.</li> <li>3. Grant your users the appropriate access to the <code>Contract</code> field on opportunities.</li> </ol>
Orders to an opportunity	<ol style="list-style-type: none"> <li>1. On Order page layouts, add the <code>Opportunity</code> field.</li> <li>2. On Opportunity page layouts, add the Orders related list.</li> <li>3. Grant your users the appropriate access to the <code>Opportunity</code> field on orders.</li> </ol>
Orders to a quote	<ol style="list-style-type: none"> <li>1. On Order page layouts, add the <code>Quote</code> field.</li> <li>2. On Quote page layouts, add the Order related list.</li> <li>3. Grant your users the appropriate access to the <code>Quote</code> field on orders.</li> </ol>
Order products to a quote line item	<ol style="list-style-type: none"> <li>1. On Order Product page layouts, add the <code>Quote Line Item</code> field.</li> <li>2. On Quote Line Items page layouts, add the Order Products related list.</li> <li>3. Grant your users the appropriate access to the <code>Quote Line Item</code> field on order products.</li> </ol>
Quotes to a contract	<ol style="list-style-type: none"> <li>1. On Quote page layouts, add the <code>Contract</code> field.</li> <li>2. On Contract page layouts, add the Quotes related list.</li> <li>3. Grant your users the appropriate access to the <code>Contract</code> field on quotes.</li> </ol>

For more details about page layouts and user access, see “Customizing Page Layouts” in the Salesforce Help and “Overview of User Permissions and Access” in the Salesforce Help.

## Data.com

Data.com is the solution for delivering leading business data inside Salesforce. The Data.com product suite includes Data.com Prospector and Data.com Clean, as well as related Data.com features: Social Key, Data.com Reports, and Data.com Data Assessments.

In addition to the change listed below, we've made some enhancements to the Data.com Search API, specifically the DatacloudContact and DatacloudCompany objects. For more information, see [Data.com API](#) on page 317.

### **Enhanced Privacy for Data.com Contacts with Canadian Addresses**

We've updated the Data.com do-not-contact preference with a new name and additional functionality to better support Canada's privacy requirements.

## Enhanced Privacy for Data.com Contacts with Canadian Addresses

We've updated the Data.com do-not-contact preference with a new name and additional functionality to better support Canada's privacy requirements.

User Permissions Needed	
To implement Data.com:	"Customize Application"

The Data.com do-not-contact preference has been renamed `Respect Do-Not-Contact Settings and Canada's Privacy Requirements`. When it's selected, contact records with Canadian addresses will be affected as follows.

- Email addresses will be masked out in Data.com search results and on the contact card; and
- Email addresses will be removed in Data.com exports

The preference will continue to mask out or remove phone and email values for contact and lead records already in Salesforce that have `Do Not Call` and `Email Opt Out` selected. The preference does not affect what data is added to or displayed in Salesforce.

To set the preference, click **Setup > Data.com Administration > Preferences**.

# Work.com

Work.com is a sales and service performance-management tool that helps managers and teams learn faster and perform better.

The Summer '14 features only apply to Work.com on Salesforce, and not the legacy Work.com product. Work.com is currently limited to English language support.

## **Skills (Generally Available)**

Ever wish you could quickly find the experts in project management, contract negotiation, or any other field? Want a way to showcase your talents or abilities? Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

## **Give Different Types of Rewards**

Work.com Rewards allow you to tie tangible rewards to your badges. You can now attach badges to tangible rewards from most digital gift codes globally.

## **Work.com Goal Enhancements**

You can now track reduction metrics and metrics that don't have an initial value of zero. You can also adjust the weight of different metrics.

## **Added Support for Triggers and Workflow**

The following Work.com objects now support triggers and workflow. For a full list of the features compatible with Work.com objects, see "Triggers and Workflow for Work.com Objects" in the Salesforce Help.

## **Other Changes in Work.com**

There are other important changes to Work.com, including additional functionality in Communities and Salesforce1.

# Skills (Generally Available)

Ever wish you could quickly find the experts in project management, contract negotiation, or any other field? Want a way to showcase your talents or abilities? Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

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

Skills requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition** and are included in **Performance Edition**.



### **Note:**

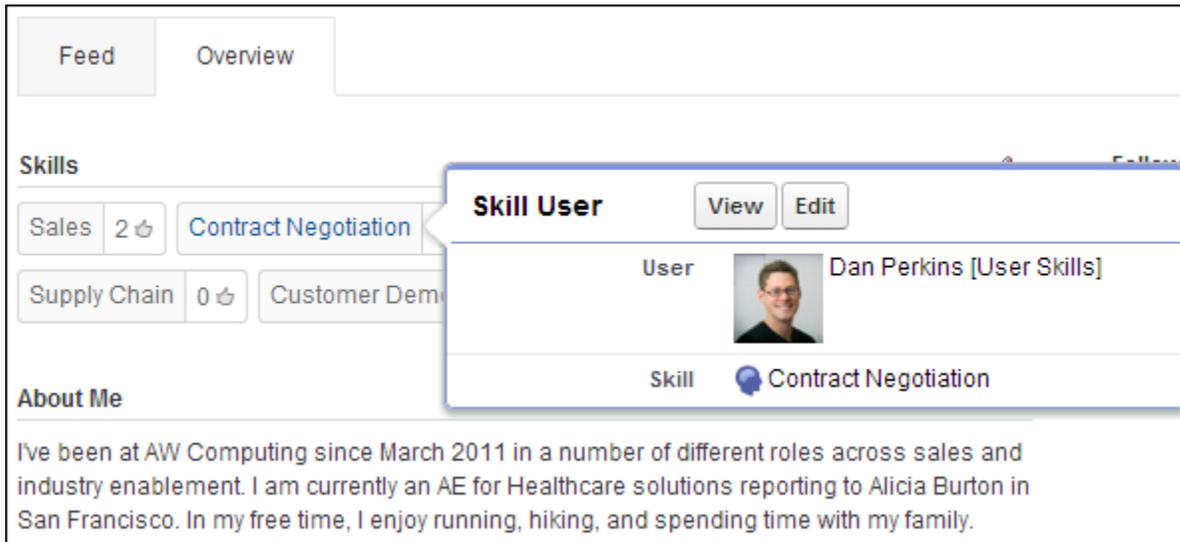
The generally available Skills feature requires a Work.com license. Organizations that previously enrolled in the pilot will have access to their Skills data after they obtain a Work.com license.

Users can add or remove skills on their Chatter profile page or on record detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

Administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you could restrict users from creating skills, and designate that only skills created by an administrator can be

assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have “Modify All Data” and “View All Data” permissions.

Additionally, administrators can customize the skill and endorsement objects by adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules. The skill hover can also be customized to expose specific standard and custom fields.



There are improvements to skills in Summer '14:

- Customizable hovers that can expose custom fields
- Feed posts when a person adds a new skill



**Note:** The Skills feature is not supported in Communities.

Skills have special behaviors and limitations. See “Skills Limitations” in the Salesforce Help for details about who can see and work with skills and endorsements.

### Enable Skills

Enable skills in your organization on the Work.com Settings page.

## Enable Skills

Enable skills in your organization on the Work.com Settings page.

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

Skills requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition** and are included in **Performance Edition**.

### User Permissions Needed

To enable skills:

“Customize Application”

1. From Setup, click **Customize > Work.com > Settings**.
2. Click **Enable** under Turn on Skills.

Optionally, you can enable other skills settings:

#### **Edit Skills and Endorsements via record detail pages**

Disables inline editing of skills and endorsements on Chatter profiles. Recommended if you have customized these objects with custom required fields.

#### **Generate feed posts when users add a new skill**

Automatically creates a Chatter feed post when a user adds a new skill to a profile.

3. Click **Save**.

## Give Different Types of Rewards

Work.com Rewards allow you to tie tangible rewards to your badges. You can now attach badges to tangible rewards from most digital gift codes globally.

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

Recognition requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition**, and are included in **Performance Edition**.

Work.com Rewards now supports your choice of rewards programs or brands. Some of the information previously held in a Reward Fund is now held in a new object, Reward Fund Type. Additionally, Reward Fund Type records also can hold more information to support different types of rewards. Here's a quick introduction to the differences between the two.

### **Reward Fund Type**

This object holds the fixed information about a reward such as the currency type, redemption information, and CSV file upload details. Examples include Amazon.com<sup>™</sup>, iTunes<sup>™</sup>, or Starbucks<sup>™</sup>.

### **Reward Fund**

This object holds the gifts codes and can only be tied to a single reward fund type. Each reward fund has a set value that you determine by purchasing gift codes for the specific denomination.

For example, a reward fund called Q1 US Rewards may contain codes linked to Amazon.com gift cards worth \$100 each. Another reward fund called Q1 Customer Service Rewards may contain codes linked to Amazon.com gift cards worth \$20 each. These reward funds would be related to the same reward fund type. However, a reward fund linked to Starbucks gift cards would be related to a different reward fund type.

You can create reward badges in three steps.

1. Create a reward fund type or use the default Amazon.com reward fund type.
2. Create a reward fund and upload reward codes.
3. Tie a thanks badge to a reward fund.

### **Create Reward Fund Types**

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

### Create Reward Funds

Use reward funds to hold the gift codes related to a reward fund type.

### Create Reward Badges

Create rewards badges the same way you would create any other badge.

## Create Reward Fund Types

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

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

Recognition requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition**, and are included in **Performance Edition**.

User Permissions Needed	
To view Reward Fund Types:	“Read” on Reward Fund Types
To create Reward Fund Types:	“Create” on Reward Fund Types “Read” and “Create” on Reward Funds “Read” and “Create” on Rewards



**Note:** Work.com is currently limited to English language support.

1. Click the Reward Fund Type tab.

If the Reward Fund Type tab isn't available, click  to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.
3. Enter the Reward Fund Type details.

Field	Description
Reward Fund Type Name	The name of the reward fund type. Try to pick something descriptive, like Amazon.CA (Canada) or Starbucks (US).
Credit System	Select Gift Codes to tie your rewards to a cash reward. Select Points if the reward is not tied to cash. Reward Fund Types that use Points ignore the Currency Code field.
Reward Value Column	The column in a CSV file that specifies the reward values. The upload uses the third column by default. Enter a number to specify a different column.
Redemption Information	The instructions for redeeming the reward, including any extra steps the user may need to take to redeem the reward.
Predefined	Read-only setting that indicates if a reward fund type is predefined, like the default Amazon.com type. You can't change the name, credit system, or currency code on predefined reward fund types. Predefined fund types are system generated and can't be edited.

Field	Description
Owner Name	The owner of the reward fund type.
Active	Whether the reward fund type is active or not. Reward funds can only be tied to active reward fund types.
Currency Code	The type of currency.
Reward Code Column	The column in a CSV file that specifies the reward codes. The upload uses the second column by default. Enter a number to specify a different column.
Redemption Url	The URL where the reward is redeemed. This field is optional based on the type of reward code. For reward codes that are links, do not enter a redemption URL.
Terms and Disclaimer	Extra legal information about the reward fund type.

4. Click **Save**.

## Create Reward Funds

Use reward funds to hold the gift codes related to a reward fund type.

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

Recognition requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition**, and are included in **Performance Edition**.

User Permissions Needed	
To view Reward Funds:	“Read” on Reward Funds
To create Reward Funds:	“Create” on Reward Funds “Create” on Rewards

Users can build reward badges from the reward funds they created. Reward funds can include Amazon.com™ gift cards purchased from one of our third-party vendors, such as TangoCard™, or different rewards programs beyond Amazon.com.

1. Click the Reward Fund tab.

If the Reward Fund tab isn't available, click **+** to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.
3. Name your fund, select the Reward Fund Type, and enter the reward value.
4. Click **Save**.
5. Upload or enter your gift codes.
  - To upload gift codes through a CSV file, select **Upload CSV**, then select **Choose File**. Select a CSV file and click **Upload**.
  - To manually enter gift codes, select **New Reward**. Enter the value of your gift code and click **Save**.

## Create Reward Badges

Create rewards badges the same way you would create any other badge.

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

Recognition requires a license to **Work.com Motivate, Work.com Align, or Work.com Perform**, which are available as add-on licenses for **Professional Edition, Enterprise Edition, or Unlimited Edition**, and are included in **Performance Edition**.

User Permissions Needed	
To view Reward Badge:	“Read” on Reward Funds
To create Reward Badge:	“Create” on Reward Fund
	“Create” on Rewards
	“Create” and “Edit” on Documents
	AND
	“Create Custom Badge Definitions” if the “Restrict Custom Badge Creators” setting is enabled for your organization

You need available reward fund types and reward funds prior to creating reward badges.

1. On the Recognition tab, click **Build a Badge**.
2. Enter a title and description for the badge, then add a badge image.
3. Select a reward fund for the badge.  
Optionally, you can add badge limits, restrict users who can give the badge, and make the badge a Company Badge.
4. Click **Save**.

## Work.com Goal Enhancements

You can now track reduction metrics and metrics that don't have an initial value of zero. You can also adjust the weight of different metrics.

### Track progress for reduction metrics

In addition to tracking progress on metrics with increasing targets, you can now track reduction metrics as well. For example, you can add a metric for reducing the number of pushed opportunities from 5 to 2. The progress is visible in the completion percentage of the metric. Metrics that don't have an initial value of zero are also now supported.

**Name**

**Type**

**Initial Value**      **Target Value**      **Due Date**  
           

**How will you update progress?**  
 Manually     From a Salesforce report

Cancel

### Adjust metric weights

Assign different weights to metrics to precisely track the completion of a goal. For example, if an account executive is using different measures to track a single goal, they can assign a different weight percentage to each measure based on its importance. The effect of the metric weighting is visible in the total completion percentage of the goal.

**Adjust Weights** x

100  
% Allocated

[Reset](#)

Metrics (4)	Weight %
<span style="color: purple;">■</span> *Lagging Metric: 3.5x Pipe Gen of Q1 ACV Target	<input type="text" value="0"/>
<span style="color: green;">■</span> Make 40 Calls a Week	<input type="text" value="30"/>
<span style="color: pink;">■</span> Send a remarkable piece of content to prospects 1 time a w...	<input type="text" value="20"/>
<span style="color: orange;">■</span> Shorten Negotiation Sales Stage Duration	<input type="text" value="50"/>
<b>100%</b>	

Delete Weights      Cancel

## Added Support for Triggers and Workflow

The following Work.com objects now support triggers and workflow. For a full list of the features compatible with Work.com objects, see “Triggers and Workflow for Work.com Objects” in the Salesforce Help.

Objects	Features Enabled	Work.com Editions Affected
Reward, Reward Fund, Reward Fund Type	Triggers, Workflow	Motivate, Align, Perform
Goals, Goal Collaborator, Goal Link	Workflow	Align, Perform

Objects	Features Enabled	Work.com Editions Affected
Coaching Notes	Triggers, Workflow	Align, Perform
Feedback, Feedback Question, Feedback Request	Triggers, Workflow	Align, Perform
Feedback Question Set, Performance Cycles	Triggers, Workflow	Perform
Skills	Workflow	Motivate, Align, Perform

## Other Changes in Work.com

There are other important changes to Work.com, including additional functionality in Communities and Salesforce1.

### Communities Additions

Thanks badges are now specific to the community they're created in. Additionally, communities users can now create rewards. For more information, see [Work.com Enhancements for Communities](#).

### Salesforce1 Additions

Skills, Goals, and Coaching are now accessible from Salesforce1. For more information, see [Salesforce1 Enhancements](#).

### Set Limits on Work.com Badges

Set limits on the number of badges that can be given per user or across all users when creating or editing badges on the Recognition tab. This is particularly useful when creating badges tied to reward funds.

### Autofollow Goals and Coaching

Users now automatically follow the goals they create or commit to. Additionally, users also automatically follow their coaching relationships. Users can unfollow goals and coaching relationships, if necessary.

### Customize the Chatter Publisher for Goals and Coaching

Administrators can customize the goal or coaching feed with custom actions. For example, custom coaching actions can help focus the conversation by asking the coach to record progress on the sales pipeline, obstacles, and next steps.

### New Filters for Metrics on the Coaching Page

There are additional filters available for metrics displayed on coaching relationships. Users can now filter metrics by "Goals Owned" or "Committed Goals" and also further filter for metrics that are in progress or completed.

# Service

Salesforce's Service Cloud helps you provide a comprehensive customer service experience for your customers.

## **Case Feed**

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases so that they can resolve customer issues more quickly in a Chatter-like feed.

## **Case Management**

Case management helps your support team receive, track, and resolve customers' issues.

## **Community Templates for Self-Service (Beta)**

Community Templates for Self-Service lets you build, brand, and deploy self-service customer support sites that look great on any device.

## **Entitlement Management**

Entitlement Management lets you and your support agents verify and fulfill customers' support contracts.

## **Knowledge**

Salesforce Knowledge is a Knowledge Centered Support certified knowledge base that's designed to help your support team easily create, organize, and retrieve information.

## **Live Agent**

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat.

## **Open CTI**

Open CTI helps partners integrate Salesforce with Computer-Telephony Integration (CTI) systems without installing adapter programs on call center users' machines.

## **Salesforce Console for Service**

The Salesforce Console for Service is an app designed for users in fast-paced environments who need to find, update, and create records quickly to support their customers.

## **Service Communities**

Chatter Answers and Ideas provides customers with a self-service community where they can post questions and receive answers from other customers or support agents, as well as post, vote for, and comment on innovative ideas on the Web.

## **Social Customer Service**

Social Customer Service allows you to respond to your customers via social networks and capture important case information.

# Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases so that they can resolve customer issues more quickly in a Chatter-like feed.

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

### ***Customize Case Feed Layouts in New Ways***

With a resizable highlights panel, collapsible publisher, and full-width feed, it's easier than ever to create Case Feed layouts that put the information your agents need front and center.

### ***Associate Contacts with Outgoing Email in Case Feed in New Ways***

We've improved the way we associate outgoing emails with contacts so it's easier to send an email to multiple contacts and clearer to see which contacts are associated with an email.

### ***Make Quick Text Messages Available to Agents in More Case Feed Actions***

Quick Text messages are now available in the Case Feed Portal, Log a Call, and Change Status actions, making it easy for support agents to add standardized text when replying to customers and updating cases.

### ***Simple Version of the Case Feed Email Action Available for Salesforce1***

Add the Send Email action to case page layouts to let Salesforce1 users send email messages directly from case records, without having to use the mail program on their mobile device.

### ***Inline Images Now Appear Correctly in Email Replies from Case Feed***

We've fixed an issue that prevented inline images in incoming emails from being displayed when support agents replied to messages using the Email action in Case Feed. Now it's easier for agents to refer to those images when they're responding to customers.

### ***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.

### ***Increase Agent Collaboration and Productivity with Case Experts (Pilot)***

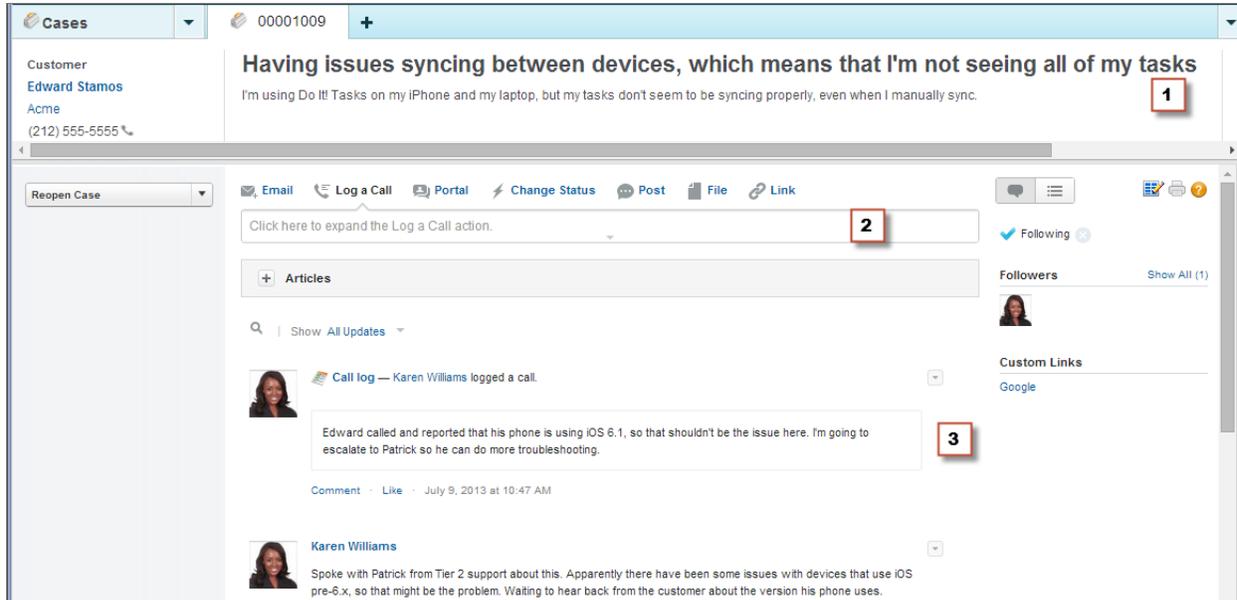
Easily identify the experts on case topics so agents can collaborate to solve customer issues quickly.

### ***Other Changes to Case Feed***

We made updates to Case Feed to improve the agent experience, including helpful feed items and email presentation in the feed, and to improve security.

## **Customize Case Feed Layouts in New Ways**

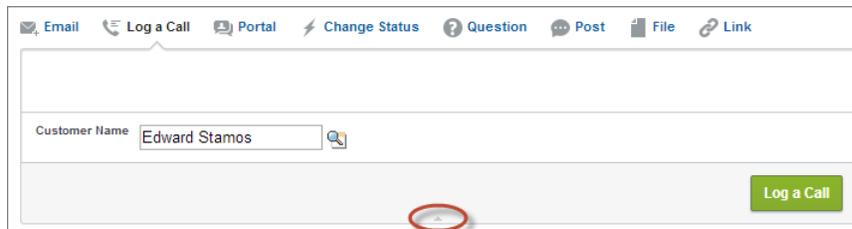
With a resizable highlights panel, collapsible publisher, and full-width feed, it's easier than ever to create Case Feed layouts that put the information your agents need front and center.



1. Resizable highlights panel—Agents can click and drag the dividers between columns on the highlights panel to show more of the information they're interested in and hide less important details. Double-clicking a divider returns the columns to their original sizes. Columns that have no fields in the layout are automatically collapsed. In addition, when agents resize the height of the highlights panel when viewing a case in a primary tab in the Salesforce console, the description field now expands to show more text.

The resizable highlights panel is automatically available on all Case Feed pages.

2. Collapsible publisher—Let agents see more of what's in the feed without having to scroll by collapsing the publisher when the page loads and after an action is complete—for example, after an agent creates a call log using the Log a Call action. As soon as an agent clicks inside the publisher, the highlighted action and all of its fields are immediately available. To collapse the publisher again, the agent can click the carat at the bottom.



To enable the collapsible publisher, select `Automatically Collapse Publisher` on the Case Feed Settings page.

3. Full-width feed—Expand the feed to take up more of the page so agents can see more information with less scrolling when they view cases in Salesforce console tabs and subtabs. How much space the feed occupies when this setting is enabled depends on the size of the page, which can change based on the size and resolution of an agent's screen and on whether there are components in the sidebar of the Case Feed page or the console.

To enable a full-width feed, select `Use Full-Width Feed in the Console` on the Case Feed Settings page.

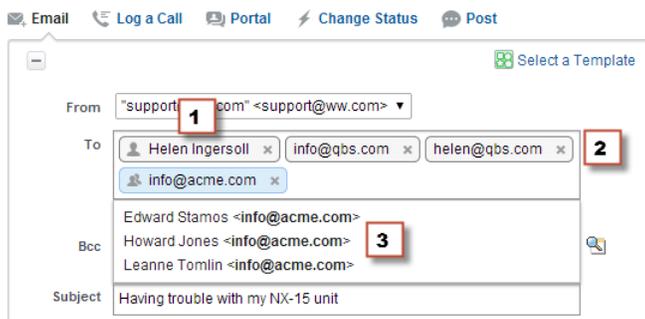


**Note:** The resizable highlights panel and full-width feed aren't supported on Internet Explorer 7.

For more information, see “Create and Edit Feed Layouts in Case Feed” in the Salesforce Help.

## Associate Contacts with Outgoing Email in Case Feed in New Ways

We've improved the way we associate outgoing emails with contacts so it's easier to send an email to multiple contacts and clearer to see which contacts are associated with an email.



1. When agents enter an email address that matches one contact, the address appears as a button with the contact's name.
2. Agents can copy and paste multiple email addresses separated by spaces or commas. These email addresses appear as buttons, and, if they're associated with a contact, will show the contact's name.
3. When agents enter an email address that matches multiple contacts, the address appears as a button. Clicking the button brings up a list of contacts associated with the email address. Agents can choose from this list the contact they want to associate with the email message.

This functionality is available in the To, Cc, and Bcc fields in the Case Feed email action.

## Make Quick Text Messages Available to Agents in More Case Feed Actions

Quick Text messages are now available in the Case Feed Portal, Log a Call, and Change Status actions, making it easy for support agents to add standardized text when replying to customers and updating cases.

When you create or update a Quick Text message, you can make it available in as many channels as you want. Depending on which features are enabled in your organization, these channels may be available:

- **Email**—the Case Feed Email action
- **Live Agent**—the Live Agent console or Live Agent in the Salesforce console
- **Portal**—a community or a customer portal
- **Phone**—the Case Feed Log a Call action
- **Internal**—the Case Feed Change Status action

Quick Text Name:

Message:

Available Merge Fields:

Channel:

- Available
- Portal
- Phone
- Internal

Chosen:

- Live Agent
- Email

To add or change channels on a Quick Text message, click **New** on the Quick Text home page, or click **Edit** next to an existing message.

## Simple Version of the Case Feed Email Action Available for Salesforce1

Add the Send Email action to case page layouts to let Salesforce1 users send email messages directly from case records, without having to use the mail program on their mobile device.

Cancel Send Email Submit

To Address:

CC Address:

Subject:

HTML Body:

**B** *I* U [abc](#)

Messages sent with the Send Email action are automatically associated with the case, included in the case's feed, and added to the Emails related list on the case.

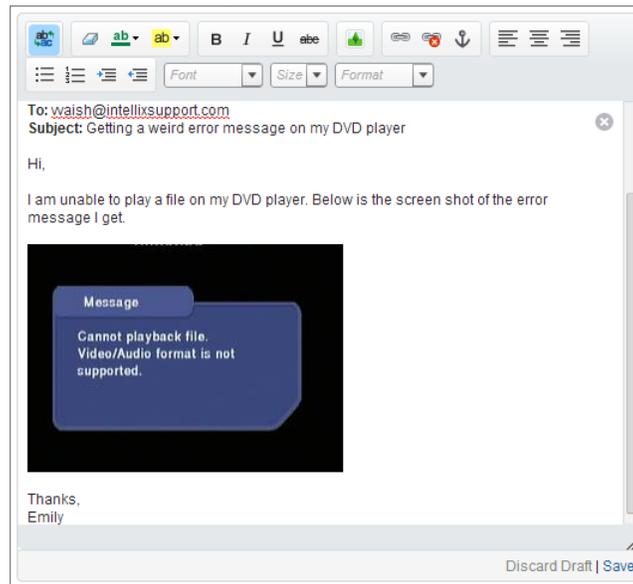
The Send Email action is available only on cases. You can add it to the publisher on any case page layout.

For more information, see [Add a Simple Version of the Case Feed Email Action to Salesforce1](#) on page 66.

## Inline Images Now Appear Correctly in Email Replies from Case Feed

We've fixed an issue that prevented inline images in incoming emails from being displayed when support agents replied to messages using the Email action in Case Feed. Now it's easier for agents to refer to those images when they're responding to customers.

When an agent clicks **Reply** or **Reply All** in the feed item for an incoming email message, the message appears as part of a thread in the Email action. If the agent is using the rich text editor in the Email action, any inline images included in the original email message are included in the thread. When the agent sends the reply, the original images are included in the email, and count toward the size limit for the message.



**Note:** Images aren't displayed in the Email action when agents use the plain text 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.

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

### User Permissions Needed

To create and edit page layouts:	"Customize Application"
To assign page layouts:	"Manage Users"

Access to all of the files associated with a case is critical to support agents when they're helping your customers. The attachment component lets agents view and manage all of the Chatter files, attachments from emails, and case attachment related list files

for a case, all on the Case Feed page. Using the attachment component, agents can quickly attach a file to an email and download a file.

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

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

## Increase Agent Collaboration and Productivity with Case Experts (Pilot)

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

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

User Permissions Needed	
To create and edit page layouts:	“Customize Application”
To assign page layouts:	“Manage Users”



**Note:** Case Experts is currently available through a pilot program. For information on enabling Case Experts for your organization, contact [salesforce.com](https://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 Setup, click **Customize > Cases > Page Layouts**.
2. Click **Edit**, and then click **Feed View** in the page layout editor.
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.

For more information about using topics and endorsing experts, see “Find and Endorse People Knowledgeable about a Topic” in the Salesforce Help.

## Other Changes to Case Feed

We made updates to Case Feed to improve the agent experience, including helpful feed items and email presentation in the feed, and to improve security.

### See Feed Items for Attachments Added from the Case Detail View

Now, when a support agent attaches a file to a case from the Case Detail view in Case Feed, a feed item is generated. Feed items for attachments make the feed a more complete history of the activity on a case and make it easier for agents to quickly and easily review what's happened on the case. Previously, only attachments added with the Post or File action in the Case Feed publisher generated a feed item.

### Exclude Email Threads from Drafts in the Feed

Improve email publishing in the feed by excluding the previous emails in the thread when composing emails. This prevents the previous emails in the thread from being incorporated in the outbound email message. For more information, see “Settings for Feed Views in Case Feed” in the Salesforce Help.

### Customize the Appearance of Emails in the Feed

Improve the presentation of emails in the feed by applying `Size of Email Feed Item Body`, `Blank Lines in Email Feed Item Body`, or `Collapse Previous Emails in Email Feed Item Body`. For more information, see “Customize Support Settings” in the Salesforce Help.

### New Security Requirement for Addresses Used as From Addresses in Case Feed Email Action

To enhance security, we now require addresses used as From addresses in the Case Feed Email action to be Salesforce-verified. Verified addresses include any verified Email-to-Case address, any verified organization-wide email address, the address associated with the current user's Salesforce user profile, and the address in the current user's Email Settings.

## Case Management

Case management helps your support team receive, track, and resolve customers' issues.

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

### Receive Larger Emails with On-Demand Email-to-Case

We've increased the size limit for email messages that come in through On-Demand Email-to-Case from 10MB to 25MB, so customers can now send you longer emails and more attachments.

## Receive Larger Emails with On-Demand Email-to-Case

We've increased the size limit for email messages that come in through On-Demand Email-to-Case from 10MB to 25MB, so customers can now send you longer emails and more attachments.

The 25MB per message limit applies to the entire message: the headers, the body, all attachments, and the encoding. Note that two other limits still apply to On-Demand Email-to-Case emails:

- On-Demand Email-to-Case automatically shortens email text to 32,000 characters. Contact [salesforce.com](https://salesforce.com) if you'd like this limit raised to 128,000 characters for your organization.
- Individual attachments can't be larger than 10MB each.

For more information, see “Email-to-Case and On-Demand Email-to-Case Overview” in the Salesforce Help.

## Community Templates for Self-Service (Beta)

Community Templates for Self-Service lets you build, brand, and deploy self-service customer support sites that look great on any device.

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



### Note:

This release contains a beta version of Community Templates for Self-Service that is production quality but has known limitations. For information on enabling this feature for your organization, contact Salesforce.

Your customers want an easy way to interact with your company whenever and wherever they are. A self-service community gives your customers easy access to knowledge articles so that they can help themselves when they have questions. Guest users can access information and articles organized by data categories for your different products. Authenticated users can contact agents through official support channels and create and manage their cases. The self-service templates let you extend your community to a variety of devices with a consistent user experience every time.

To create a mobile self-service community, you need to create a Salesforce Community, create articles in Salesforce Knowledge, set up data categories, and then use Community Templates for Self-Service in Site.com to customize and brand your site.

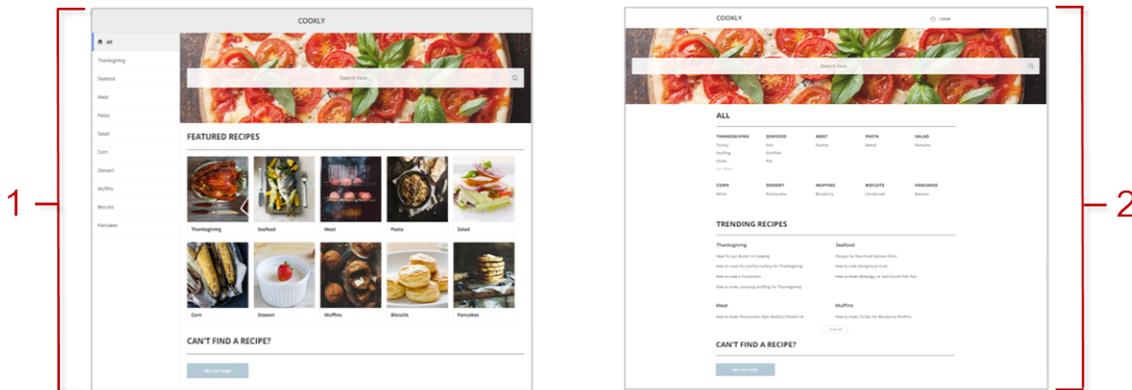
Within Site.com, these templates supply all of the page elements you'll need to create a single-page application to display your site. Simply edit a few of the page elements to include information about your data categories, add a few images to extend your branding, and you're ready to go—without any coding! Site.com Studio even lets you to create different language versions of your site. And because all languages are maintained within the site, you don't need to create and manage a separate site for each language.

### Select a Predefined Template to Customize Your Site

Each template produces a site that is based on a single-page application—a Web app that loads a single HTML page. Unlike a traditional website, which comprises several pages that the user navigates between, a single-page application consists of several views that are used to update the page dynamically when the user interacts with it.

We've created two self-service templates to choose from. Both self-service templates provide the page elements you need to quickly customize a site where users can:

- Search a public knowledge base for answers to their questions without contacting an agent.
- View articles based on their categories.
- Select a specific category and search or browse within a smaller subset of articles.
- Log in and create a case when they can't find the answer they're looking for.

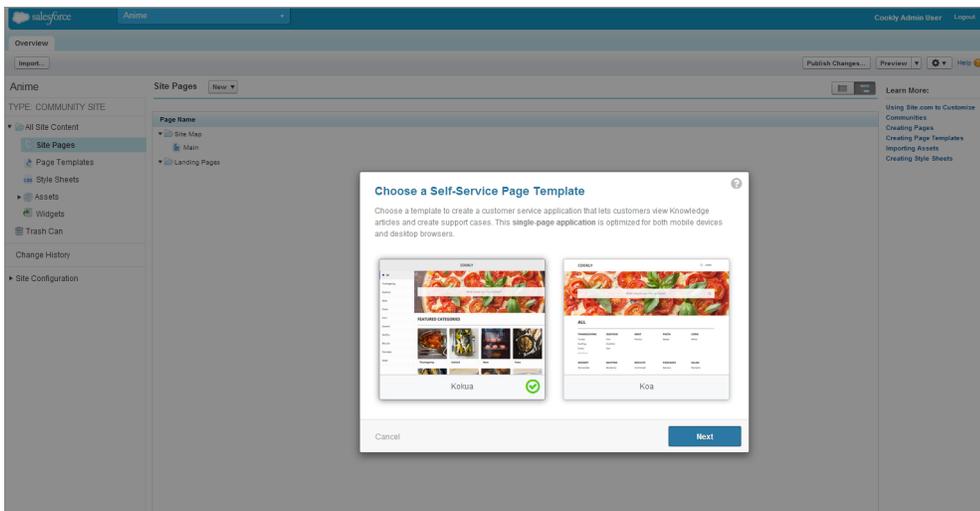


Kokua (1) is a visually rich self-service template that presents users with knowledge articles organized by data categories. Users can also submit cases to get help from agents.

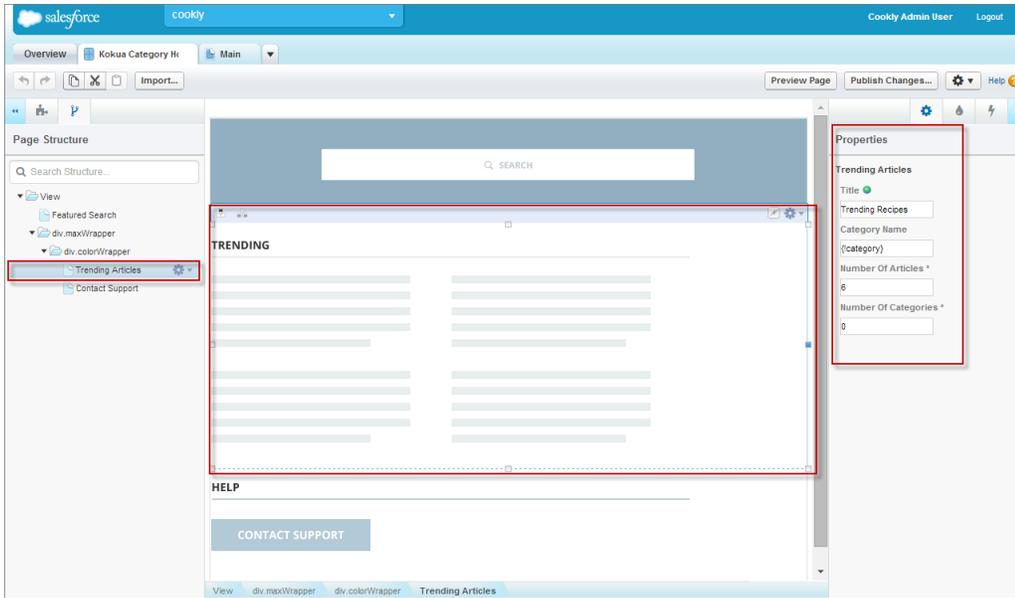
Koa (2) is a text-based self-service template that's optimized for mobile devices. It lets users search for and view articles by text categories, and contact support if they can't find what they're looking for.

## Set Up the Template and Edit Its Views

A wizard in Site.com Studio lets you select a template and then walks you through the initial setup for your data categories.



Each template is made up of a collection of different views that you can edit to reflect things like number of articles you'd like to display for each category, or the number of articles to return as search results. You can also customize the text that your customers see in the search boxes, buttons, and other labels. Just open the view for editing, select the page element you'd like to customize, and make your changes right in the Properties panel. Leverage the design capabilities of Site.com by dragging and dropping additional components onto the views to further customize your site.

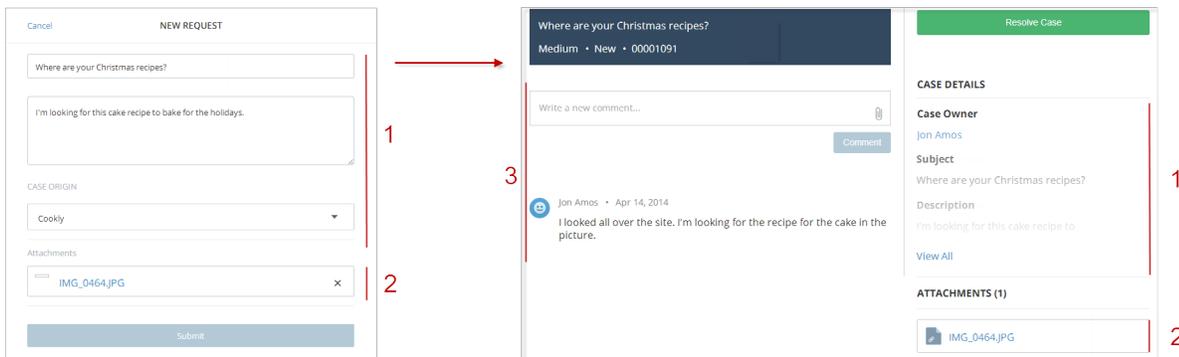


In the designer, you can see a live preview of your site as you're configuring it. Using the Site.com Studio designer you can:

- Specify whether you're a designer or a contributor
- Switch between Design and Live modes
- Preview and publish changes as you make them
- View the site on a desktop, tablet, or mobile phone.

## Let Your Customers Contact Support Reps

While the templates have different ways of presenting articles to your customers, both templates provide the same user experience when a customer contacts a support agent. Once a customer logs in, they can create a case and manage existing cases all from one location.



Using the case publisher, customers can create a case and then manage the case through its lifecycle: The case publisher lets customers:

- Submit and view detailed information (1) regarding their case or support request.
- Add attachments (2) to case comments.
- Add comments to the case (3) as well as view and respond to comments from support reps.

To learn more about setting up your own mobile-ready, self-service site, see the [Community Templates for Self-Service Implementation Guide](#).

# Entitlement Management

Entitlement Management lets you and your support agents verify and fulfill customers' support contracts.

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

## Add the Milestone Tracker as a Salesforce Console Component

Agents working on cases need to be aware of how much time they have until their milestones are due because their performance is often measured based on how often they miss milestones. The milestone tracker lets agents see the time remaining on an active milestone or how overdue the milestone is if its target date has passed, along with a list of upcoming milestones and closed milestones.

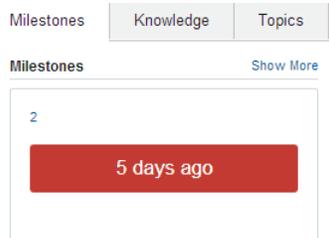
## Add the Milestone Tracker as a Salesforce Console Component

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### User Permissions Needed

To create custom console components: "Customize Application"

Previously, you could add the milestone tracker only as a component on Case Feed layouts. Now you can add it as a Salesforce console component instead, giving you more flexibility to customize the desktop based on your company's needs. Including the milestone tracker tool in a console, rather than on a Case Feed page, lets agents track milestones when they're working with cases and leaves space on the Case Feed page for other tools or a wider feed.



The milestone tracker is available for case page layouts in organizations that have enabled entitlement management. You can add it from the **Custom Console Components** link in the page layout editor.

## Knowledge

Salesforce Knowledge is a Knowledge Centered Support certified knowledge base that's designed to help your support team easily create, organize, and retrieve information.

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### Auto-Complete for Article Keyword and Title Searches

Give your agents, partners, customers, and public users suggestions as they enter search keywords or titles. When users choose a suggestion the search box auto-completes.

### Provide Code Samples with the Click of a Button

With the new code sample button, knowledge base authors can add code samples in the rich text editor without worrying about tricky formatting.

### Next-Gen Knowledge Search (Pilot)

Apache Solr (pronounced “solar”) now powers the next generation of search infrastructure in Salesforce Knowledge. We’re excited to unveil a major search engine upgrade, bringing you faster, smarter search and more relevant results.

### Search Synonym Groups More Easily

When your knowledge base administrators search for a synonym within synonym groups, search results now show the number of groups containing that synonym. We’ve also redesigned the search area, making the search box always visible.

### Search Suggested Queries Resource in REST API (Generally Available)

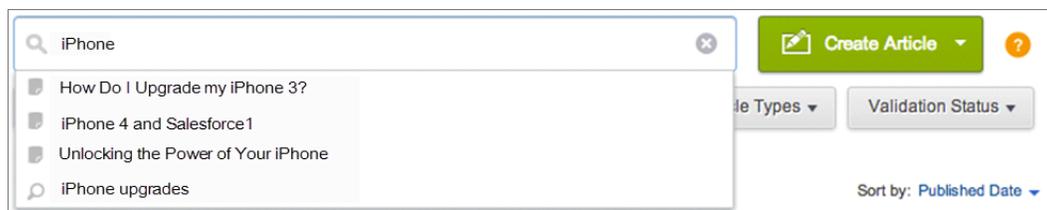
A new resource in REST API, Search Suggested Queries, returns a list of suggested searches based on the user’s query string text matching searches that other Knowledge users have performed.

### Knowledge One Search Page Generally Available

All organizations new to Salesforce Knowledge have the Knowledge One search permission on by default. Older organization can turn on Knowledge One through permissions or profiles.

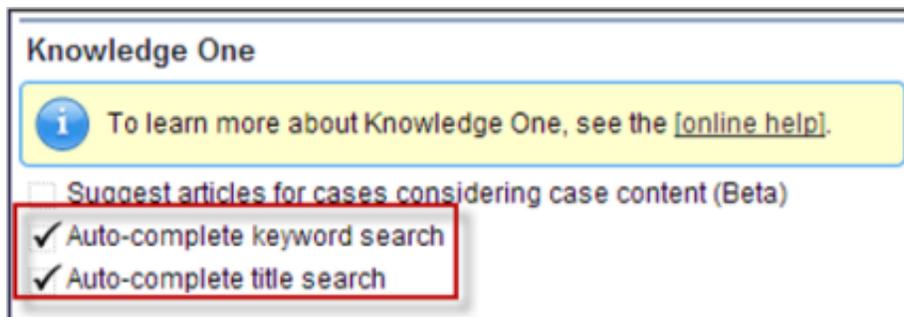
## Auto-Complete for Article Keyword and Title Searches

Give your agents, partners, customers, and public users suggestions as they enter search keywords or titles. When users choose a suggestion the search box auto-completes.



In the auto-complete drop-down article titles have a paper icon while the keywords have a magnifying glass icon.

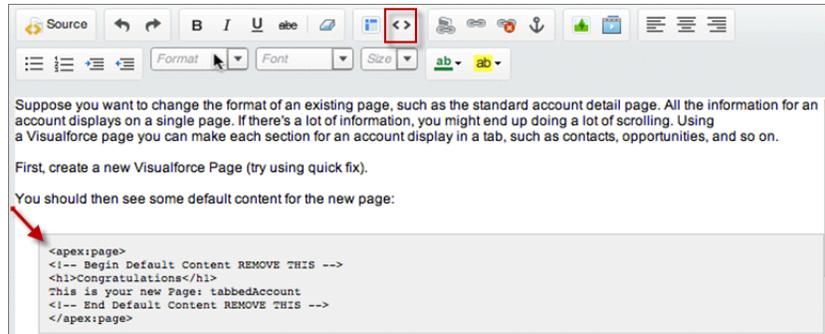
Two new settings are available on the Salesforce Knowledge settings page. From Setup go to **Customize > Knowledge > Settings**.



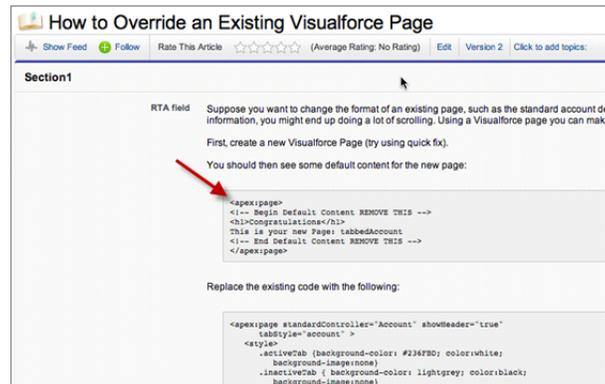
- Auto-complete keyword search suggests the three most popular keyword searches performed on the Knowledge tab. Suggestions are based on the channel (internal, customer, partner, or public) the user is searching. Keyword search history is refreshed once a day.
- Auto-complete title search: suggests up to three articles with matching titles.

## Provide Code Samples with the Click of a Button

With the new code sample button, knowledge base authors can add code samples in the rich text editor without worrying about tricky formatting.



Readers can easily identify the content that is a code sample.



## Next-Gen Knowledge Search (Pilot)

Apache Solr (pronounced “solar”) now powers the next generation of search infrastructure in Salesforce Knowledge. We’re excited to unveil a major search engine upgrade, bringing you faster, smarter search and more relevant results.



**Note:** Next-Gen Knowledge Search is currently available through a pilot program. Contact [salesforce.com](https://salesforce.com) to enable this feature for your organization.

Take advantage of these improvements and new search capabilities.

- **Faster indexing** means it takes less time for records to be searchable after they're created or updated.
- **Improved alphanumeric search** means more relevant search results. We now handle punctuation more efficiently, so that it’s easier for the search engine to recognize when a user is searching for specialized strings such as URLs, email addresses, and phone numbers.

- **Improved tokenization** also means more relevant search results. The search engine breaks down all searchable text into smaller pieces, or tokens, at meaningful boundaries (spaces, punctuation, and alphanumeric) and stores them in the search index. Proper tokenization is essential for accurate search results in any language, and especially so for East Asian languages that are written without spaces between words, such as Chinese, Japanese, Korean, and Thai (CJKT). For these languages, *morphological tokenization* replaces the more simplistic *bigram tokenization* and reduces the number of non-meaningful tokens indexed.
- **Organizations searching in CJKT languages are uniquely affected.** Besides tokenization, we've enhanced punctuation handling and added support for stemming.
- **Enable the option to change the default search operator from OR to AND.** Matching on all terms in the user's query tends to produce more relevant search results.



**Warning:** Enabling the default AND operator means that multi-term synonyms are no longer supported. If your organization has defined multi-term synonyms, they will be ignored and excluded from search results.

- If your organization has enabled synonyms:
  - ◇ **Use SynonymDictionary components in the Metadata API to manage synonym groups.** Optimize search results for acronyms, variations of product names, and other terminology unique to your organization.
  - ◇ **Enable the option to perform synonym matching for search queries that include trailing wildcards.** For example, if you've defined a synonym group containing the terms *bill* and *invoice*, a search for `bill*` returns matches for *bill*, *billing* (wildcard expansion), and *invoice* (synonym matching).

## Search Synonym Groups More Easily

When your knowledge base administrators search for a synonym within synonym groups, search results now show the number of groups containing that synonym. We've also redesigned the search area, making the search box always visible.

Previously, the search box wasn't visible until users clicked a **Show Filters** link. We've removed the link to make it easier to start a search.

These changes affect synonym search in Setup, in **Customize > Search > Knowledge Synonyms**.

Action	Dictionary	Synonym Group	Languages	Last Modified
<a href="#">Edit</a>   <a href="#">Del</a>	Default	apples, oranges	English	3/7/14
<a href="#">Edit</a>   <a href="#">Del</a>	Default	apple, macintosh	English	3/7/14
<a href="#">Edit</a>   <a href="#">Del</a>	Default	apple, apples	English	3/7/14

## Search Suggested Queries Resource in REST API (Generally Available)

A new resource in REST API, Search Suggested Queries, returns a list of suggested searches based on the user's query string text matching searches that other Knowledge users have performed.

For more information, see [New Resources](#) on page 299 and the [Force.com REST API Developer's Guide](#).

## Knowledge One Search Page Generally Available

All organizations new to Salesforce Knowledge have the Knowledge One search permission on by default. Older organization can turn on Knowledge One through permissions or profiles.

The Knowledge One search page 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, attach, detach, edit, publish, delete, send, and more, depending on your permissions.

Also, when you use case feed, the Knowledge tab layout is applied to the article sidebar.

To switch to the Knowledge One and the Knowledge tab, add the Knowledge One permission to user [profiles](#) or [permission sets](#).

### Enabling Knowledge One with Profiles

To add the Knowledge One permission to a profile:

1. From Setup, click **Administration Setup** > **Manage Users** > **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**.

Once Knowledge One is available for your users, you'll need to define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel. External data sources are available in beta. Log a salesforce.com support ticket to enable your external objects.

### Enabling Knowledge One with Permission Sets

To add the Knowledge One permission to a permission set:

1. From Setup, click **Administration Setup** > **Manage Users** > **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 Knowledge One.

## 7. Click **Save**.

Once Knowledge One is available for your users, you'll need to define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel. External data sources are available in beta. Log a salesforce.com support ticket to enable your external objects.

## Searching Articles and External Sources on the Knowledge Tab

To search Salesforce Knowledge and your external data sources:

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 organization
    - ◊ Data categories: Values depend on those created in your organization
    - ◊ Article type: Values depend on those created in your organization
    - ◊ Validation Status: No Filter (all articles), Not Validated (articles that are not validated), Validated (validated articles), and any other values supported in your organization 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 on 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, attach or detach, edit, publish, delete, send, and more, depending on your permissions.

## Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat.

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### ***Transfer Files During a Chat (Generally Available)***

Give Live Agent customers the ability to upload and transfer files to agents during a chat so they can easily share important information without leaving their chat window.

### ***Transfer Chats to a Chat Button Queue***

Agents can now transfer chats to chat button queues. This increases the chance of connecting a customer with an agent who can answer the customer's question.

### ***Create and Share Articles Using the Knowledge One Widget***

We replaced the Live Agent articles tool with the improved Knowledge One widget to give your agents better access to articles they can share with their chat customers.

### ***Other Changes in Live Agent***

We made a few updates to Live Agent that improve the agent's experience during chats with customers.

### ***Live Agent Deployment API: New Methods***

Use the enhanced Live Agent Deployment API methods to search for Salesforce Knowledge articles based on your customers' information.

### ***Live Agent REST API: New Visitor Resources***

We've added a few Live Agent REST API resources to make it easier to customize and extend the functionality of Live Agent chat windows in your company's mobile and Web applications. With the latest resources, you can customize your chat visitors' experience as they chat with agents.

## **Transfer Files During a Chat (Generally Available)**

Give Live Agent customers the ability to upload and transfer files to agents during a chat so they can easily share important information without leaving their chat window.

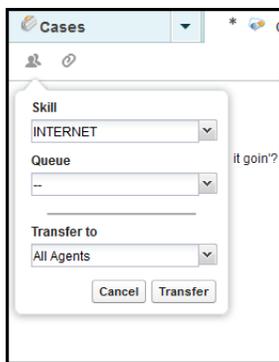
Agents associate incoming files with new or existing records. For example, if a customer is receiving an error when they try to complete a process, they can upload and transfer a screenshot of the error message to the agent, which the agent could attach to an existing case to provide more context for the customer's issue.

## **Transfer Chats to a Chat Button Queue**

Agents can now transfer chats to chat button queues. This increases the chance of connecting a customer with an agent who can answer the customer's question.

Previously, agents could transfer chats, but they could only transfer them to a specific agent or an agent who was associated with a skill group. Now, agents can also transfer a chat to a chat button queue, allowing it to be routed to a new agent associated with that queue.

Agents can transfer chats directly from the chat window in the Salesforce console. Agents can transfer chats to a skill group or a chat button queue, but not both.



## Create and Share Articles Using the Knowledge One Widget

We replaced the Live Agent articles tool with the improved Knowledge One widget to give your agents better access to articles they can share with their chat customers.

Previously, agents could send articles to customers with a Live Agent-specific articles tool. We've discontinued the Live Agent articles tool in the Salesforce console and replaced it with the Knowledge One widget. This gives your agents a more consistent user experience as they assist customers.

The Knowledge One widget lets agents:

- Send a published chat answer to a customer.
- Share an article as a URL, if the article is published publicly.
- 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.

To learn more about the Knowledge One widget, see [Compare Article Widgets for Cases at a Glance](#) and [Setting Up Knowledge One Widget](#) in the Salesforce Help.



**Note:** If you have an existing organization that uses the Live Agent articles tool to share knowledge-base articles, your agents will still see the Live Agent articles tool in the Salesforce console. To replace the articles tool, enable Knowledge One. The Knowledge One widget will be automatically visible for new organizations created after the Summer '14 release.

## Other Changes in Live Agent

We made a few updates to Live Agent that improve the agent's experience during chats with customers.

### Limited Support for Right-to-Left Languages

To support more users and chats in Salesforce consoles, Live Agent now offers support for right-to-left languages, such as Arabic or Hebrew. Previously, Live Agent didn't support right-to-left languages in chat windows. Now these languages are partially supported to give your agents and customers the best chat experience possible, regardless of language. Since right-to-left languages aren't fully supported, some features might not display as expected.

### Chat Workspace Closes When a Chat Is Transferred to Another Agent

When an agent transfers a Live Agent chat to someone else, the chat log and related subtabs close automatically, freeing up the agent's workspaces to handle new customer chats. Previously, agents had to close the chat log and open subtabs

that were associated with the chat manually after the chat had been transferred to another agent. Now this happens automatically, saving agents time.



**Warning:** Agents must save any changes to the chat log and related subtabs before they transfer the chat to another agent because any unsaved changes will be lost when the workspace closes.

### Desktop Notifications Supported in More Browsers

Desktop notifications are now fully supported in Google Chrome™, Mozilla® Firefox®, and Apple® Safari® web browsers. Now, agents who use these browsers are alerted when they receive a chat request. Previously, desktop notifications were partially supported in only Google Chrome™.

## Live Agent Deployment API: New Methods

Use the enhanced Live Agent Deployment API methods to search for Salesforce Knowledge articles based on your customers' information.

### New Methods

These methods are new in version 31.0 of the Live Agent Deployment API.

- `addCustomDetail.doKnowledgeSearch`—

Retrieves a custom detail value from a pre-chat form when a customer requests a chat with an agent. After an agent accepts the chat request, this value is used as a search keyword to find articles in the Knowledge One widget. The `doKnowledgeSearch()` method conducts a search by using the `value` parameter in the `addCustomDetail` method. Available in API version 31.0 and later.

For more information (English only) about the Live Agent Deployment API, see the [Live Agent Developer's Guide](#).

## Live Agent REST API: New Visitor Resources

We've added a few Live Agent REST API resources to make it easier to customize and extend the functionality of Live Agent chat windows in your company's mobile and Web applications. With the latest resources, you can customize your chat visitors' experience as they chat with agents.

Resource	Description
Availability	Indicates whether a chat button is available to receive new chat requests.
Breadcrumb	Sets a breadcrumb value to the URL of the Web page that the chat visitor is viewing as the visitor chats with an agent. The agent can then see the value of the breadcrumb to determine the page the chat visitor is viewing.
Settings	Retrieves all settings information about the Live Agent deployment that's associated with your chat session. The <code>Settings</code> request is required as the first request to establish a chat visitor's session.
VisitorId	Generates a unique ID to track a chat visitor when they initiate a chat request and tracks the visitor's activities as the visitor navigates from one Web page to another.

## Open CTI

Open CTI helps partners integrate Salesforce with Computer-Telephony Integration (CTI) systems without installing adapter programs on call center users' machines.

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

### ***Open CTI: New Directory Numbers Method***

Access an API method to retrieve phone numbers from the directory of a Salesforce call center.

## Open CTI: New Directory Numbers Method

Access an API method to retrieve phone numbers from the directory of a Salesforce call center.

A new method is available to help developers and advanced administrators retrieve a list of phone numbers from a Salesforce call center's directory. For more information, see [Open CTI API](#) on page 330 and "Customizing a Call Center Directory" in the Salesforce Help.

## Salesforce Console for Service

The Salesforce Console for Service is an app designed for users in fast-paced environments who need to find, update, and create records quickly to support their customers.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

### ***Salesforce Console Integration Toolkit: New Methods***

Access API methods to customize a console programmatically.

### ***Add the Topics List and Milestone Tracker as Salesforce Console Components***

Let agents categorize records with the topics list and track their performance against milestones with the milestone tracker while working with cases in the Salesforce console.

### ***Other Changes to the Salesforce Console***

Updates were made to the console, such as including multi-components in saved user sessions, new buttons on the interaction log, and limited support for right-to-left languages.

## Related Lists as Console Components

Add related lists to the sidebars of a Salesforce console to display relevant information next to specific pages.

For example, add related lists to a console's sidebar on accounts to show relevant information without scrolling:

## Adding Related Lists as Console Components

With a few clicks, you can add related lists to the sidebars of a Salesforce console.

### User Permissions Needed

To add custom console components: “Customize Application”

1. For standard objects, from Setup, click **Customize** > *Object* > **Page Layouts**.  
For custom objects, from Setup, click **Create** > **Objects**, then choose the object.
2. Click **Edit** next to a page layout.
3. Click **Custom Console Components**.
4. Next to the sidebar in which you want to add your related list component, choose how to display and organize your component by *Style*. You can choose either Stack, Tabs, or Accordion. For more information, see “Sidebar Styles for Console Components” in the Salesforce Help.
5. Specify the size of the sidebar in the console by selecting height or width, and typing its percentage or number of pixels.
6. Under *Type*, choose Related List.
7. Under *Component*, choose a related list’s name. Optionally, you can hide a related list from pages where it appears as a component to prevent duplicate information from showing. If you want to reorder related lists, you must do so from page layouts.
8. Under *Label*, type the name for your component as it should display to console users from the sidebar.
9. Specify the size of the component in the sidebar by selecting height or width, and typing its percentage or number of pixels.
10. Click **Save**.



#### Note:

Custom buttons don’t appear on related list components.

## Salesforce Console Integration Toolkit: New Methods

Access API methods to customize a console programmatically.

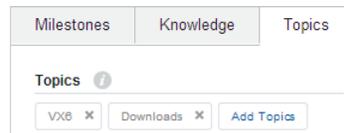
Several new methods are available to help developers and advanced administrators customize a console's interaction log and navigation tab. For more information, see [Salesforce Console API \(Integration Toolkit\)](#) on page 329.

## Add the Topics List and Milestone Tracker as Salesforce Console Components

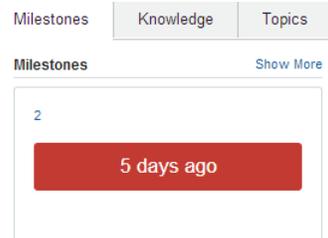
Let agents categorize records with the topics list and track their performance against milestones with the milestone tracker while working with cases in the Salesforce console.

These tools were introduced in Spring '14 and were previously available only as sidebar components on feed-based page layouts. Now you can add them as console components instead so they're available to users but don't take up space on page layouts.

The topics list shows the topics associated with a case. Agents can click on a topic to see other records related to it, and can easily add or delete topics.



The milestone tracker shows the entitlement process milestones related to a case. Agents can see details about each milestone and can mark milestones as completed.



For more information on the milestone tracker console component, see [Add the Milestone Tracker as a Salesforce Console Component](#) on page 167. For more information on adding console components, see [Add Console Components to Page Layouts](#) on page 177.

## Other Changes to the Salesforce Console

Updates were made to the console, such as including multi-components in saved user sessions, new buttons on the interaction log, and limited support for right-to-left languages.

### Saved User Sessions Include Multi-Components

To help users continue working from where they left off in a console, multi components that appear during users' sessions appear again when users refresh their browsers, close and open browser tabs, or log out and log back in to Salesforce.

To include multi-components in saved sessions, administrators must select **Save User Sessions** on a console. For more information, see "Save User Sessions for a Salesforce Console" and "Custom Console Components Overview" in the Salesforce Help.

## Add Call Data to an Interaction Log

In consoles with SoftPhones, a new **Add Call Data** button displays on interaction logs. When clicked, it adds a call's date and time to a log so that users can quickly track customer interactions. When users handle multiple calls, the button includes a drop-down list from which users can add a specific call's data to a log. For more information, see “Add Notes to Records in a Salesforce Console” and “Use a SoftPhone with a Salesforce Console” in the Salesforce Help.

## Clear Notes from an Interaction Log

A new **Clear Log** button displays on interaction logs. When clicked, it removes notes or a Subject from a log's current session so that users can start over or add new notes. Saved notes aren't removed, and they are stored on the record's Activity History related list. For more information, see “Add Notes to Records in a Salesforce Console” in the Salesforce Help.

## Limited Support for Right-to-Left Languages

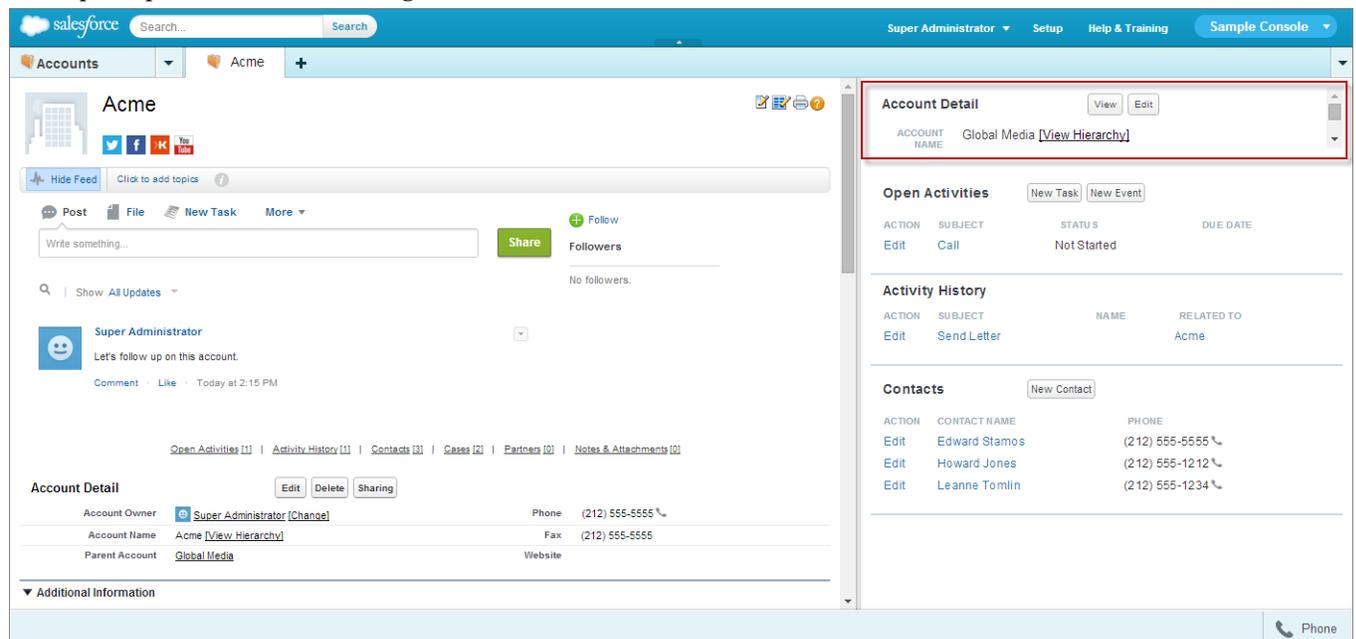
To support more users, a Salesforce console offers new support for right-to-left languages, such as Arabic or Hebrew. Since right-to-left languages aren't fully supported, some features might not display as expected in a console, such as Case Feed or Salesforce Knowledge.

## App Launcher Removed from the Navigation Tab

The App Launcher is no longer available from the navigation tab because the logos and links it presents to connected and standard apps caused navigation problems for console users. To learn more about the App Launcher, see “Using the App Launcher” in the Salesforce Help.

## New Look for Lookup Components

Lookup components have a new design that's more modern and consistent with the console's user interface:



The screenshot shows the Salesforce console interface for the 'Acme' account. The top navigation bar includes the Salesforce logo, a search bar, and user information (Super Administrator). The main content area is divided into several sections:

- Account Detail:** A red box highlights this section, which shows the account name 'Global Media' and a 'View Hierarchy' link.
- Open Activities:** A table with columns for ACTION, SUBJECT, STATUS, and DUE DATE. It shows one activity: 'Call' with status 'Not Started'.
- Activity History:** A table with columns for ACTION, SUBJECT, NAME, and RELATED TO. It shows one activity: 'Send Letter' related to 'Acme'.
- Contacts:** A table with columns for ACTION, CONTACT NAME, and PHONE. It shows three contacts: 'Edward Stamos', 'Howard Jones', and 'Leanne Tomlin'.

For more information, see “Add Console Components to Page Layouts” in the Salesforce Help.

# Service Communities

Chatter Answers and Ideas provides customers with a self-service community where they can post questions and receive answers from other customers or support agents, as well as post, vote for, and comment on innovative ideas on the Web.

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

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

### ***Introducing Chatter Questions (Beta)***

Ask questions and get answers in Chatter with Chatter Questions.

### ***End of Support for Legacy Answers***

Legacy Answers (referred to in the past as Answers) is no longer supported effective Spring '15.

## **Introducing Chatter Questions (Beta)**

Ask questions and get answers in Chatter with Chatter Questions.

This release contains a beta version of Chatter Questions that is production quality but has known limitations. For more information, see [Ask Questions in the Feed with Chatter Questions \(Beta\)](#) on page 95.

## **End of Support for Legacy Answers**

Legacy Answers (referred to in the past as Answers) is no longer supported effective Spring '15.

You will still be able to use the Legacy Answers feature, but support for technical or product issues will no longer be provided by salesforce.com, and there will not be active development on the product. We launched the Chatter Answers feature in Spring '12 to provide a new product with enhanced functionality, based on feedback from users. Chatter Answers provides more features, greater flexibility, and a more intuitive user interface.

We encourage you to upgrade to Chatter Answers before the Spring '15 release. It has enhanced features and more functionality than the Legacy Answers product—all at no additional cost. We understand that this may cause some disruption for those using Legacy Answers, and we are here to help. Upgrading requires only minor changes on your part. To make upgrading as smooth as possible, [see the knowledge article](#) with instructions on migrating from Legacy Answers to Chatter Answers.

If you have further questions, please reach out to Customer Support by logging a ticket on your Help & Training page. To understand salesforce.com's philosophy on retiring functionality, [see our feature retirement philosophy](#).

## **Social Customer Service**

Social Customer Service allows you to respond to your customers via social networks and capture important case information.

Social Customer Service is available in **Enterprise, Performance,** and **Unlimited** editions.

User Permissions Needed	
To administer Social Customer Service	“Manage Users” AND “Customize Application” AND “Social Objects” AND “Social Publisher”
To create case feed items:	Feed Tracking for All Related Objects on the Case object
To send and receive social media posts or messages	“Social Objects” AND “Social Publisher” AND Case Feed enabled AND Social account



**Important:** Log a salesforce.com support ticket to enable the Social Objects and Social Publisher permissions. You must have a Social Hub license and sufficient Radian6 managed accounts. If you are switching from the Radian6 for Salesforce package, make note of it in your support ticket.

For setup information see, [Getting Started with Social Customer Service](#).

### **Moderation for Social Customer Service**

Now agents can manually triage social posts instead of automatically creating or updating a case for each new post, thus focusing on real customer issues and avoiding unnecessary open cases.

### **Quick Text for Social Customer Service**

Quick Text lets you create ready-to-send responses that Social Customer Service agents can post to social networks.

### **Other changes in Social Customer Service**

Now agents can do more within the case feed, reducing the need to navigate out of Salesforce and into social networks.

## **Moderation for Social Customer Service**

Now agents can manually triage social posts instead of automatically creating or updating a case for each new post, thus focusing on real customer issues and avoiding unnecessary open cases.

Not all posts require a case. For example, a complementary tweet or post does not need agent assistance. However, with standard social customer service setup, cases are automatically created from each social post. Using moderation, agents can manage which posts get cases and which are ignored.

<input type="checkbox"/>	Action	Name	Social Persona	Content
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<u>TWEET FROM: tmi...</u>	<u>Thomas Milton</u>	@UniContai
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<u>Post from Alan We...</u>	<u>Alan Wells</u>	Why do my
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<u>TWEET FROM: qbe...</u>	<u>Gerry Becker</u>	@UniContai
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<u>Post from John Sm...</u>	<u>John Smith</u>	The wrong p
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<u>TWEET FROM: em...</u>	<u>Edmund Mannon</u>	@UniContai

Moderation is enabled with a Social Hub rule in your Radian6 account to turn off automatic case creation. See the Radian6 online help for detailed information.

1. From your Radian6 account, click on the **Rules** tab.
2. Create a rule, or use an existing one, to indicate 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.

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 custom Apex case logic in **Setup > Customize > Social Apps Integration > Social Customer Management > Settings**. See *Modifying the Default Apex Class* in the Salesforce Help.

## Quick Text for Social Customer Service

Quick Text lets you create ready-to-send responses that Social Customer Service agents can post to social networks.

Agents can quickly insert pre-created text to increase efficiency and consistency in delivering common answers. For example, during a service outage, an agent can create a Quick Text message about how to check the status of the outage. All agents with access to this Quick Text can post and respond quickly and accurately. For information on Quick Text, see *Enable Quick Text* and *Quick Text Home Page* in the Salesforce Help.

## Other changes in Social Customer Service

Now agents can do more within the case feed, reducing the need to navigate out of Salesforce and into social networks.

Giving out passwords to your organizations' social network accounts is risky. The less agents and social media managers need to login directly to social networks, the better. Now Social Customer Service agents have more actions and information available within the case feed, reducing the need log in to Twitter or Facebook.

### Delete an Outbound Social pPost

An agent can delete an outbound social post from its social network. The post appears grayed out in the case feed.



### Identify Posts Deleted Externally

If a social post was deleted externally, in its social network, the post appears grayed out in the case feed and agents know it can't be viewed on the social network.

### Retweet Inbound Social Posts

An agent can retweet an inbound social post. For example, when a customer posts a complimentary tweet, an agent may want to retweet to a wider audience.



### Identify Social Accounts Able to Direct Message a Customer

When an agent needs to communicate privately with a customer, the `Managed Social Account` drop-down identifies which accounts can't direct message the customer. The social account must follow the customer to send a direct message.

**In Reply To**

 **Morpheus** @morpheusR6  
@scsmain Can we talk 1 on 1?

**Managed Social Account**

@scsmain ▼

- @CSpurrTest2 (can't Direct Message)
- @Scspingpong (can't Direct Message)
- @DemoScs (can't Direct Message)
- @scsmain**
- @derrick\_demo (can't Direct Message)

**Message Type**

Direct Message ▼

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**Identify When Images, Videos, or Links are Included in Social Posts**

Agents can see when a customer includes an image, video, or link and respond more accurately. Previews are available if the content is public.



# Analytics

With reports and dashboards, you can analyze historical trends, embed report charts in object records, and use the analytics API to develop your own Salesforce analytics applications.

## ***Analytics Dashboards API (Generally Available)***

The REST-based Analytics Dashboards API gives you programmatic access to your Salesforce dashboards. You can easily integrate dashboard data into any web or mobile application, inside or outside the Salesforce platform.

## ***Track Forecasting Changes***

How well are your forecasts predicting your team's progress towards its sales goals? Now you can answer that question with a historical trend report using Forecast data.

## ***History tracking reports can now include two fields whose values are calculated by lookup.***

Until now, history tracking was only available on fields belonging to the current object.

## ***Keep Favorite Report Folders In View***

Navigating to the report you want on the Reports tab can be a bother when the folder pane contains many report and dashboard folders. Now users can pin their most-used report and dashboard folders to the top of the folder list so they don't have to scroll down every time.

## ***Delete Multiple Reports at Once***

From time to time, you may identify reports that no one has run for a long time. Until now, you've cleaned up clutter on your Reports tab by deleting those obsolete reports one by one. Now you can use filter criteria to select multiple reports and delete them all at the same time.

## ***Other Changes in Analytics***

We've made some additional changes to analytics features.

# Analytics Dashboards API (Generally Available)

The REST-based Analytics Dashboards API gives you programmatic access to your Salesforce dashboards. You can easily integrate dashboard data into any web or mobile application, inside or outside the Salesforce platform.

The Dashboards API enables you to:

- Retrieve a list of recently used dashboards
- Get metadata, data, and status for a specified dashboard
- Trigger a dashboard refresh

For more information and code examples, see the [Analytics API Developer Guide](#).

## ***Resources for the Dashboards API***

The Analytics Dashboards API provides several REST resources for accessing and refreshing dashboards.

## ***Dashboards API Limits***

The Dashboards API has some restrictions in addition to the general API limits.

## Resources for the Dashboards API

The Analytics Dashboards API provides several REST resources for accessing and refreshing dashboards.

To access the Analytics Dashboards API, establish an authenticated OAuth session and encode responses and requests in JSON. The API has the following resources:

Resource	Supported HTTP Method	Description	Resource URL
Dashboard List	GET	Returns a list of recently used dashboards.	<code>/services/data/v31.0/analytics/dashboards</code>
Dashboard Results	GET PUT	A GET request returns the metadata, data, and status for the specified dashboard. A PUT request triggers a dashboard refresh.	<code>/services/data/v31.0/analytics/dashboards/&lt;dashboardID&gt;</code>
Dashboard Status	GET	Returns the status for the specified dashboard.	<code>/services/data/v31.0/analytics/dashboards/&lt;dashboardID&gt;/status</code>

## Dashboards API Limits

The Dashboards API has some restrictions in addition to the general API limits.

- Your organization can request up to 200 dashboard refreshes per hour.
- Your organization can request results for up to 5,000 dashboards per hour.



**Note:** All limits that apply to dashboards created in the dashboard builder also apply to the API.

## Track Forecasting Changes

How well are your forecasts predicting your team's progress towards its sales goals? Now you can answer that question with a historical trend report using Forecast data.

For Collaborative Forecasts, historical trending comes with a new custom report type designed to highlight forecast changes between five snapshot dates, such as five business days or five business weeks. You can visually represent the data changes in charts and on dashboards.



You can track changes in these key forecasting fields:

- Amount Without Adjustments
- Amount Without Manager Adjustment
- Quantity Without Adjustments
- Quantity Without Manager Adjustment
- Forecast Amount
- Forecast Quantity
- Owner Only Amount
- Owner Only Quantity

For existing organizations, you must activate historical trend reporting in the **Setup** menu. For new organizations created in Spring '14 and thereafter, it is activated by default. For information about activating and configuring it, see "[Set Up Historical Trend Reporting](#)" in the online help.



**Important:** Historical trend reporting in Salesforce is not a replacement for a data warehouse and will not be extended in the future to serve warehouse requirements. Hard system limits are enforced to ensure its usefulness for the purpose for which it was built. This includes limits on the time duration of tracking, limits on row count, and limits on fields and objects that are tracked.

## History tracking reports can now include two fields whose values are calculated by lookup.

Until now, history tracking was only available on fields belonging to the current object.

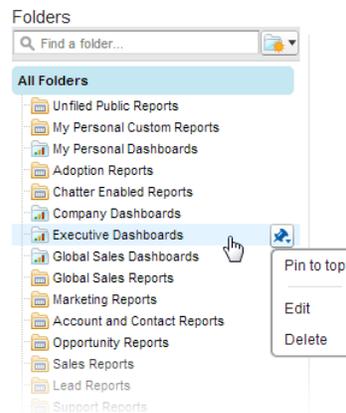
Stub content

## Keep Favorite Report Folders In View

Navigating to the report you want on the Reports tab can be a bother when the folder pane contains many report and dashboard folders. Now users can pin their most-used report and dashboard folders to the top of the folder list so they don't have to scroll down every time.

Available in: **All Editions**

### Reports & Dashboards



## Delete Multiple Reports at Once

From time to time, you may identify reports that no one has run for a long time. Until now, you've cleaned up clutter on your Reports tab by deleting those obsolete reports one by one. Now you can use filter criteria to select multiple reports and delete them all at the same time.

Available in: **All Editions**

### User Permissions Needed

To mass delete data:

"Modify All Data"

In Setup, under **Data Management** > **Mass Delete Records**, select **Mass Delete Reports** and configure a filter to find reports that need to be deleted. See [Deleting Multiple Records and Reports](#) for detailed instructions.

Reports that you delete go into the recycle bin. They aren't permanently deleted until you clear your recycle bin.



**Note:** You can't mass-delete reports that are scheduled or are used in dashboards or analytic snapshots.

## Other Changes in Analytics

We've made some additional changes to analytics features.

### **History tracking reports can now include two fields whose values are calculated by lookup.**

Until now, history tracking was only available on fields belonging to the current object.

### **Scales are displayed differently in some charts.**

Because of recent performance upgrades, the scale (not the data) in some charts may display a slightly greater range. The accuracy of the data is not affected.

### **Floating headers aren't available in some situations.**

To improve overall performance, we've limited the availability of [floating headers](#) when viewed with Internet Explorer 8.

- Matrix reports don't have floating headers in IE8.
- Summary reports with more than 50 groupings don't have floating headers in IE8.

# Site.com

Site.com is a Web content management system (CMS) that makes it easy to build dynamic, data-driven Web pages quickly, edit content in real time, and manage your websites. To improve usability, we've streamlined Site.com Studio and added new features.

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

Available (with limitations) in: **Developer** Edition

## User Permissions Needed

To build, edit, and manage Site.com sites:	Site.com Publisher User field enabled on the user detail page AND Site administrator or designer role assigned at the site level
To edit only content in Site.com sites:	Site.com Contributor User AND Contributor role assigned at the site level

## Rename Site Assets

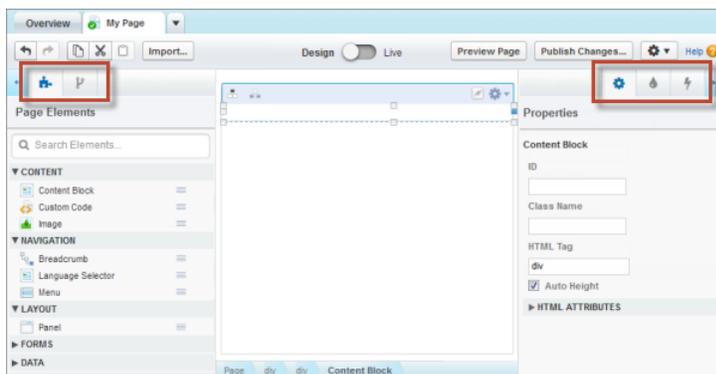
Site.com designers and site administrators can now rename assets. To rename an asset on your site if you're a site administrator or designer, hover over the asset and click  > **Rename**.

## Edit Plain Text Files

Contributors, designers, and site administrators can now edit plain text files, such as .txt, .xml, and .htm files, directly in Site.com Studio. To edit a plain text file, hover over the file in the Assets view on the Overview tab and click  > **Edit**.

## Pane Names Replaced with Icons

To streamline the appearance of Site.com Studio, we've replaced the names of several panes with icons.



Now when a page is open for editing, site administrators and designers can click:

-  to open the Page Elements pane
-  to open the Page Structure pane
-  to open the Properties pane
-  to open the Style pane
-  to open the Events pane

### **Make Rich-Text Area Fields Compatible with Internet Explorer® 11**

If your site contains a form that uses rich-text area fields and your site visitors use Internet Explorer 11, we recommend that a site administrator or designer deletes and then replaces the form to ensure that Internet Explorer 11 correctly displays the field-editing toolbar in the live site.

# Force.com Customization

Customization features enable you to expand your organization by enhancing your objects, data, and fields, customizing your organization's look and feel, augmenting your business processes, creating websites, and creating apps—all using point-and-click tools. Customization features also include tools to administer and secure your organization.

## **Custom Permissions (Developer Preview)**

Use custom permissions to give users access to custom processes or apps.

## **Publisher Enabled for Chatter Off Organizations**

Organizations that don't have Chatter enabled can now take advantage of all the robust functionality that actions provide in Salesforce1.

## **Improvements to Setup Search (Beta)**

With Advanced Setup Search, you can search for Setup menu items, custom fields, custom objects, custom profiles, permission sets, public groups, roles, and users from the sidebar in Setup.

## **General Administration**

Administration helps you manage your organization to suit your business needs.

## **Data**

The Force.com platform makes it easy for you to manage and track your data.

## **Business Logic and Process Automation**

Workflow, approvals, and Visual Workflow provide point-and-click tools for automating and simplifying complex business processes.

## **Security**

Use security to protect both your data and applications.

## **Sharing**

Sharing improves your control over who sees what.

## **Globalization**

Globalization tools help administrators manage resources that vary from country to country, such as multilanguage, multicurrency, and translated content.

## **Critical Updates**

This release includes updates that improve the performance, logic, and usability of Salesforce but may affect your existing customizations.

## **Other Changes in Force.com Customization**

Even small customization enhancements can make Salesforce easier to use.

# Custom Permissions (Developer Preview)

Use custom permissions to give users access to custom processes or apps.

Available in: **Developer** Edition



**Note:** Custom permissions are currently available as a developer preview; they're available only in Developer Edition organizations.

In Salesforce, many features require access checks that specify which users can access certain functions. Permission set and profiles settings include built-in access settings for many entities, like objects, fields, tabs, and Visualforce pages. However, permission sets and profiles don't include access for some custom processes and apps. For example, for a time-off manager app, all users might need to be able to submit time-off requests but only a smaller set of users need to approve time-off requests. You can use custom permissions for these types of controls.

Custom permissions let you define access checks that can be assigned to users via permission sets or profiles, similar to how you assign user permissions and other access settings. For example, you can define access checks in Apex that make a button on a Visualforce page available only if a user has the appropriate custom permission.

You can query custom permissions in these ways.

- To determine which users have access to a specific custom permission, use Salesforce Object Query Language (SOQL) with the `SetupEntityAccess` and `CustomPermission sObjects`.
- To determine what custom permissions users have when they authenticate in a connected app, reference the user's Identity URL, which Salesforce provides along with the access token for the connected app.

Using OAuth requests, you can retrieve custom permissions associated with a connected app for an organization, and information on whether a user has associated permissions enabled. For more information, see [Get Custom Permissions in the Identity URL Response](#) on page 228.



**Note:**

- Custom permissions aren't available in unmanaged packages.
- Custom permissions aren't included in profile settings for packages.
- If you deploy a change set with a custom permission that includes a connected app, the connected app must already be installed in the destination organization.

### Create Custom Permissions

Create custom permissions to give users access to custom processes or apps.

#### Enable Custom Permissions in Permission Sets

Custom permissions give you a way to provide access to custom processes or apps. After you've created a custom permission and associated it with a process or app, you can enable the permission in permission sets.

#### Enable Custom Permissions in Profiles

Custom permissions give you a way to provide access to custom processes or apps. After you've created a custom permission and associated it with a process or app, you can enable the permission in profiles.

## Create Custom Permissions

Create custom permissions to give users access to custom processes or apps.

Available in: <b>Developer</b> Edition
--

User Permissions Needed
To create custom permissions: "Manage Custom Permissions"



**Note:** Custom permissions are currently available as a Developer Preview.

1. From Setup, click **Develop** > **Custom Permissions**.
2. Click **New**.
3. Enter the permission information:
  - **Label**—the permission label that appears in permission sets
  - **Name**—the unique name that’s used by the API and managed packages
  - **Description**—a description that explains what functions the permission grants access to, such as “Approve time-off requests.”
  - **Connected App**—the connected app that’s associated with this permission
4. Click **Save**.

## Enable Custom Permissions in Permission Sets

Custom permissions give you a way to provide access to custom processes or apps. After you’ve created a custom permission and associated it with a process or app, you can enable the permission in permission sets.

Available in: <b>Developer</b> Edition
--

User Permissions Needed	
To enable custom permissions in permission sets:	“Manage Profiles and Permission Sets”



**Note:** Custom permissions are currently available as a Developer Preview.

1. From Setup, click **Manage Users** > **Permission Sets**.
2. Select a permission set, or create one.
3. On the permission set overview page, click **Custom Permissions**.
4. Click **Edit**.
5. To enable custom permissions, select them from the Available Custom Permissions list and then click **Add**. To remove apps from the permission set, select them from the Enabled Custom Permissions list and then click **Remove**.
6. Click **Save**.

## Enable Custom Permissions in Profiles

Custom permissions give you a way to provide access to custom processes or apps. After you’ve created a custom permission and associated it with a process or app, you can enable the permission in profiles.

Available in: <b>Developer</b> Edition
--

User Permissions Needed	
To enable custom permissions in profiles:	“Manage Profiles and Permission Sets”



**Note:** Custom permissions are currently available as a Developer Preview.

1. From Setup, click **Manage Users > Profiles**.
2. Select a profile.
3. Depending on which user interface you're using, do one of the following.
  - Enhanced profile user interface: Click **Custom Permissions**, and then click **Edit**.
  - Original profile user interface: In the Enabled Custom Permissions related list, click **Edit**.
4. To enable custom permissions, select them from the Available Custom Permissions list and click **Add**. To remove apps from the permission set, select them from the Enabled Custom Permissions list and click **Remove**.
5. Click **Save**.

## Publisher Enabled for Chatter Off Organizations

Organizations that don't have Chatter enabled can now take advantage of all the robust functionality that actions provide in Salesforce1.

You can enable or disable Chatter for your organization in Setup at **Customize > Chatter > Settings**. If Chatter is enabled, on that page you'll see the `Enable Publisher Actions` checkbox, which controls whether the actions that you create display in the Chatter publisher.

If you have Chatter and publisher actions disabled, you can still create global and object-specific actions, which appear only in Salesforce1. You just won't have the standard Chatter actions such as Post, File, Link, Poll, and Thanks available.

### Summer '14 Action Behavior

This table represents the new behavior for actions as of Summer '14. Changes in behavior are indicated in bold text.

	Chatter Off, Publisher Actions Off	Chatter On, Publisher Actions Off	Chatter On, Publisher Actions On
Global actions can be created.	Yes	Yes	Yes
Global action lists can be customized.	<b>Yes</b>	<b>Yes</b>	Yes
Object-specific actions can be created.	Yes	Yes	Yes
Object-specific action lists can be customized.	<b>Yes</b>	<b>Yes</b>	Yes
Actions appear on the Home page and Chatter tab in the full Salesforce site.	No	Yes <sup>1</sup>	Yes
Actions appear in object feeds in the full Salesforce site.	No	Yes <sup>1,2</sup>	Yes <sup>2</sup>
The actions tray is available on the Feed in Salesforce1.	No <sup>3</sup>	<b>Yes<sup>4</sup></b>	Yes
The actions tray is available on the record view in Salesforce1.	<b>Yes<sup>5</sup></b>	<b>Yes<sup>6</sup></b>	Yes <sup>6</sup>

	Chatter Off, Publisher Actions Off	Chatter On, Publisher Actions Off	Chatter On, Publisher Actions On
The actions tray is available on Flexible Pages in Salesforce1.	Yes <sup>5</sup>	Yes	Yes

1. If publisher actions aren't enabled, only standard Chatter actions (Post, File, Link, Poll, and Thanks) appear in the Chatter publisher in the full Salesforce site.
2. The Chatter feed appears on an object's detail page in the full Salesforce site only for objects that have Feed Tracking enabled.
3. When Chatter is disabled, the Feed item isn't available in Salesforce1.
4. When Chatter is enabled but publisher actions are disabled, standard and nonstandard actions appear in the actions tray in Salesforce1 or in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.
5. When Chatter and publisher actions are disabled, only nonstandard actions appear in the action tray in Salesforce1 or in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.
6. If Feed Tracking is not enabled on the object, only nonstandard actions appear in the actions tray in Salesforce1 or in third-party apps that use action lists. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.

### What Else Has Changed?

Regardless of your organization's Chatter settings:

- The Buttons, Links, and Actions node in Setup is now available on all standard objects that support buttons, links, and actions.
- The Publisher Actions section in page layouts appears for all objects that support actions.
- The Buttons, Links, and Actions related list is available for all custom objects.

## Improvements to Setup Search (Beta)

With Advanced Setup Search, you can search for Setup menu items, custom fields, custom objects, custom profiles, permission sets, public groups, roles, and users from the sidebar in Setup.

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

User Permissions Needed	
To enable Advanced Setup Search:	"Customize Application"
To search Setup:	"View Setup and Configuration"



### Note:

- Advanced Setup Search is in beta. It is production-quality but has known limitations.
- After Summer '14 is available for your organization, it might take a few weeks before your organization's setup data is indexed and searchable. During those initial weeks, searches might not return all possible results.

Advanced Setup Search includes the following enhancements.

- Search results now include custom objects and custom fields.
- Search results for permission sets return the permission set label instead of the API name.

To enable Advanced Setup Search for your organization, in Setup, click **Customize > User Interface**, then scroll to **Enable Advanced Setup Search (Beta)**. If Advanced Setup Search is disabled, users can find only Setup pages.

To find setup items, enter at least two consecutive characters of the item that you want in the Setup Search box, and then click  or press Enter. In the Setup Search Results page that appears, select an item from the list.

## General Administration

Administration helps you manage your organization to suit your business needs.

### **Description Field Added to Login IP Ranges**

When setting the Login IP Ranges for a profile or your organization, you can also enter a description for each range to help identify the purpose of the range setting.

### **More Specific Permissions for Managing Users**

We've added more specific user-management permissions that distribute the access of the "Manage Users" permission. Now organizations have more precise control over what user-management permissions their administrators have.

### **Customize Feed-Based Page Layouts in New Ways**

Expand the feed horizontally and automatically collapse the publisher when it's not in use so users can see more information at a glance when they work with records.

### **All Custom Objects Classified as Light or Enterprise Objects**

Every custom object is now classified based on whether you can use a private sharing model, Bulk API, or Streaming API with it.

### **Home Page Components**

We made some significant changes to how HTML code is handled in home page components. We also introduced a new Visualforce Area home page component.

### **Actions**

We've made some changes to the way actions work in Salesforce and Salesforce1.

### **Monitor Your Organization's Usage-based Entitlements (Generally Available)**

Track how much your organization is using a given entitlement, such as the number of logins to a customer community each month. Usage-based entitlements were formerly a beta feature.

## Description Field Added to Login IP Ranges

When setting the Login IP Ranges for a profile or your organization, you can also enter a description for each range to help identify the purpose of the range setting.

Available in: <b>Enterprise, Performance, Unlimited, Developer, and Database.com</b> Editions
---

User Permissions Needed	
To view login IP ranges:	“View Setup and Configuration”
To edit login IP ranges:	“Manage IP Addresses”

To view or edit the Description field for login IP ranges for each profile:

1. From Setup, click **Manage Users** > **Profiles**, then select a profile.
2. In the profile page, go to the Login IP Ranges section.

As you add or edit a Login IP Range, use the Description field to provide details, such as which part of your network corresponds to the range.

To view or edit the Description field for login IP ranges for your entire organization:

1. From Setup, click **Security Controls** > **Network Access**.
2. Click **New**, or **Edit** for an existing range.

## More Specific Permissions for Managing Users

We've added more specific user-management permissions that distribute the access of the “Manage Users” permission. Now organizations have more precise control over what user-management permissions their administrators have.

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

The “Manage Users” permission gives access to many user-management tasks, such as managing profiles, permission sets, roles, and password policies. You might need to give users access to some, but not all, of those tasks. For example, some users might need to manage profiles and permission sets but not to deactivate users. To improve the control over user management permissions, we've added the following permissions.

Permission Name	Allows Users to
“Assign Permission Sets”	Assign permission sets to users and remove permission set assignments.
“Manage Internal Users”	Create and edit internal users.
“Manage IP Addresses”	Create, edit, and delete trusted IP ranges.
“Manage Login Access Policies”	Specify the login access policies that apply to administrators and support organizations.
“Manage Password Policies”	Set password restrictions and login lockout policies for all users.
“Manage Profiles and Permission Sets”	Create, edit, and delete profiles and permission sets.
“Manage Sharing”	Create, edit, and recalculate sharing rules, and edit organization-wide defaults.
“Manage Roles”	Create, edit, and delete roles.

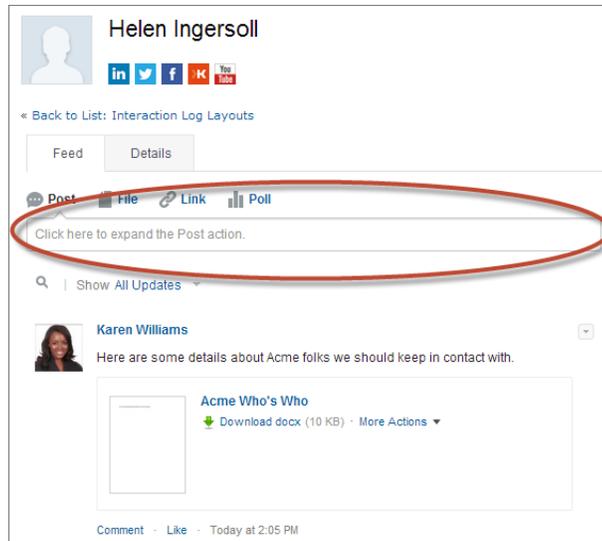
The “Manage Users” permission still exists and provides the same access that it has provided in earlier releases. When “Manage Users” is enabled, these new permissions are also automatically enabled.

## Customize Feed-Based Page Layouts in New Ways

Expand the feed horizontally and automatically collapse the publisher when it's not in use so users can see more information at a glance when they work with records.

Two new settings for feed-based page layouts let you customize feed views so users can see more information without having to scroll.

- Use the `Auto-Collapse Publisher` setting to collapse the publisher when it's not in use. The publisher expands to its regular height when a user clicks inside it.

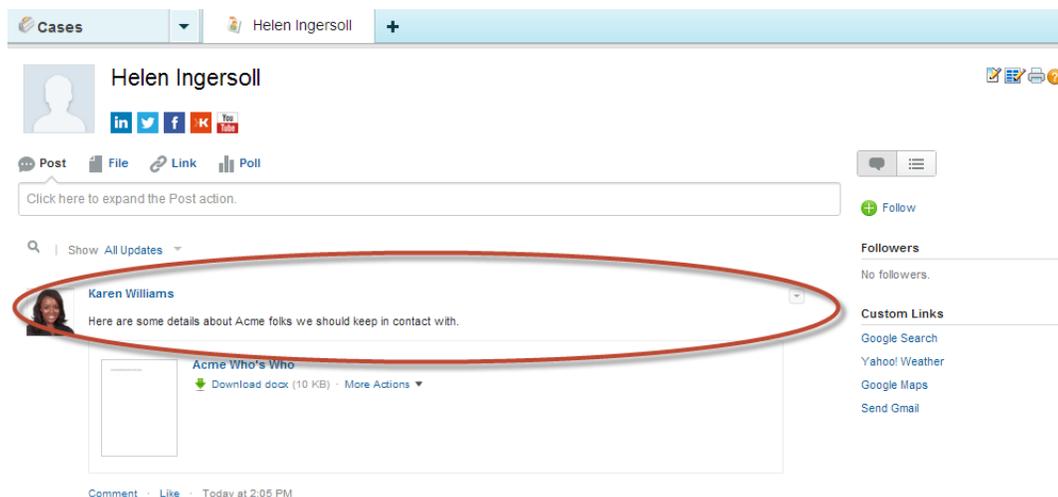


**Figure 5: Collapsible Publisher**

- Enable the `Use Full-Width Feed` setting to expand the feed horizontally to take up all available space on the page.



**Note:** This setting applies only when users view records on tabs or subtabs in the Salesforce console. 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 page layout, and whether you have console sidebar components.



**Figure 6: Full-Width Feed**

To enable either of these settings, click **Feed View** in the top menu of the page layout editor when you're editing a feed-based page layout, and then choose the setting you want. Both of these settings are automatically enabled in organizations created after Summer '14.

For more information about feed-based layouts, see “Feed-Based Layouts Overview” in the Salesforce Help.

## All Custom Objects Classified as Light or Enterprise Objects

Every custom object is now classified based on whether you can use a private sharing model, Bulk API, or Streaming API with it.

When you create custom objects, you can classify the object as a Light Application object or an Enterprise Application object by enabling or disabling the following settings.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

If these settings are enabled on an object, it's an Enterprise Application object. If these settings are disabled on an object, it's a Light Application object. The settings must all be enabled or all be disabled.

Objects created before Summer '14 automatically have these settings enabled and are classified as Enterprise Application objects.

If your organization uses Force.com Light App or Force.com Enterprise App licenses, use these object classifications to verify that your organization is following the contractual limits of those licenses.

### **Track Your Organization's Custom Object Usage by User License Type**

To keep track of how many custom objects your users are assigned to, create a custom report type with the User Licenses and Custom Object Usage by User License Metrics objects.

## Track Your Organization's Custom Object Usage by User License Type

To keep track of how many custom objects your users are assigned to, create a custom report type with the User Licenses and Custom Object Usage by User License Metrics objects.

Custom objects are available in: <b>Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
Custom report types are available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions

User Permissions Needed	
To create or update custom report types:	“Manage Custom Report Types”
To delete custom report types:	“Modify All Data”

1. From Setup, click **Create > Report Types**.
2. Click **New Custom Report Type**.
3. Fill out the fields.

For this field...	Enter or select...
Primary Object	User Licenses
Report Type Label	A label for this report type. The label appears when users create a report.  For example, Custom Object Usage by User License.
Report Type Name	A unique name for this report type.
Description	A description for this report type. This description appears when users create a report.
Store in Category	Other Reports

4. (Optional) To make this report type available to other users, select a `Deployment Status` of `Deployed`.
5. Click **Next**.
6. Click the box under the primary object.
7. Select `Custom Object Usage by User License Metrics`.
8. Click **Save**.
9. Create a report using the new report type.

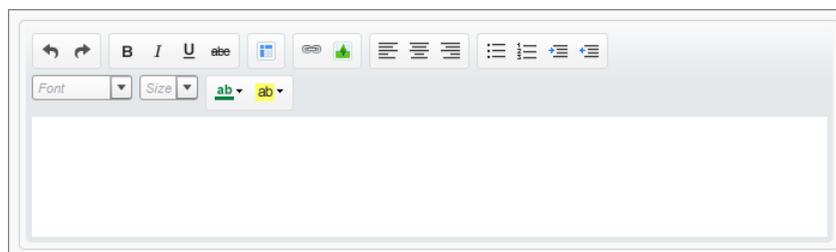
## Home Page Components

We made some significant changes to how HTML code is handled in home page components. We also introduced a new Visualforce Area home page component.

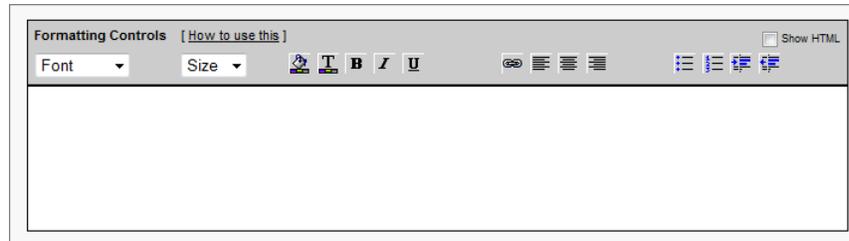
### New Rich Text Editor for HTML Area Home Page Components

We replaced the rich text editor in HTML Area home page components with a new version that supports more markup but doesn't allow HTML to be manually entered.

New HTML Area home page components will use the new rich text editor. HTML Area home page components created prior to Summer '14 that contain simple markup that is supported by the new rich text editor will appear in the new editor.



HTML Area home page components that were created prior to Summer '14 that contain code that's no longer supported for HTML components, such as JavaScript and iframes, will continue to work and will still use the old rich text editor (see note below).



**Important:** In Summer '15 we will start removing unsupported code from HTML Area home page components. As a result, components that contain JavaScript, CSS, iframes, or other unsupported markup might stop working properly. To use JavaScript or other advanced HTML elements in your home page component, we recommend that you use a Visualforce Area component instead.

### Increased Validation for Image and HTML Area Home Page Components

If you create or edit an Image home page component that contains unsupported HTML markup, all unsupported markup is removed upon saving.

The new rich text editor for HTML components doesn't allow you to enter unsupported markup. Existing HTML home page components with unsupported markup will continue to work until Summer '15, per the previous note.

### New Visualforce Area Home Page Component

The new Visualforce Area home page component lets you create home page components with custom markup, including JavaScript and CSS, which are now restricted from use in HTML Area home page components. Use Visualforce Area home page components to add dynamic content to your home page. For example, you can present content from partner apps, display charts in conjunction with the Analytics API, or add a canvas app to the home page.

Visualforce Area home page components can be added to the narrow or the wide column of the home page layout, and the referenced Visualforce page can use a standard or custom controller. You can include JavaScript in your Visualforce page, but because the component is rendered in an iframe on the home page layout, the JavaScript can't interact with the page that contains the component.

## Actions

We've made some changes to the way actions work in Salesforce and Salesforce1.

### ***Global Publisher Layouts and Global Actions Have New Locations in Setup***

Removing actions' dependence on Chatter means that we needed to rearrange things in Setup.

### ***Changes to Mobile Smart Actions Behavior***

Mobile smart actions no longer automatically display in Salesforce1.

### ***Default Event Action Lets Users Create Events from Any Publisher***

We've added a create action for events to the default actions on the global publisher layout. Now users can create events on the Home tab, the Chatter tab, and record detail pages, without administrator setup.

### Default Action Lets Users Ask Questions in Chatter

We've added a new default action for questions. Now users can ask questions on the Home tab, the Chatter tab, and record detail pages in the full Salesforce site, and on the Feed, in groups, and on record pages in Salesforce1.

## Global Publisher Layouts and Global Actions Have New Locations in Setup

Removing actions' dependence on Chatter means that we needed to rearrange things in Setup.

Global actions are now located in Setup at **Create > Global Actions > Actions**. Global publisher layouts can now be found in Setup at **Create > Global Actions > Publisher Layouts**.

## Changes to Mobile Smart Actions Behavior

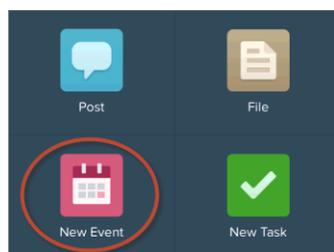
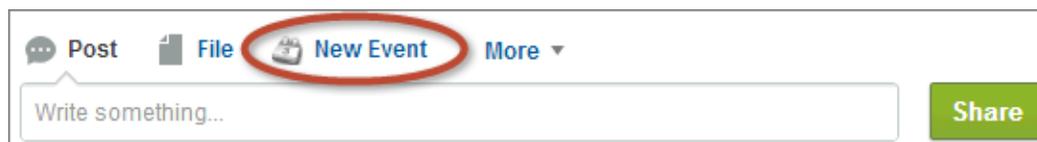
Mobile smart actions no longer automatically display in Salesforce1.

If your organization existed prior to Winter '14, and it had Chatter enabled but didn't have publisher actions enabled when Winter '14 was released, mobile smart actions were automatically displayed in Salesforce1 on the Feed page and on account, contact, lead, opportunity, and case records. However, with Summer '14, mobile smart actions are no longer automatically displayed.

In Summer '14, publisher actions are enabled for all organizations that have Chatter enabled, but nonstandard actions—actions other than Post, File, Link, Poll, and Thanks—aren't added to organizations that didn't have publisher actions enabled previously. If you disable publisher actions, and you want mobile smart actions on your page layouts, you need to add the mobile smart actions element manually. However, we recommend that you create your own actions or customize the default actions instead. Mobile smart actions display the full edit form based on the object's page layout, while actions that you create can be optimized for mobile use.

## Default Event Action Lets Users Create Events from Any Publisher

We've added a create action for events to the default actions on the global publisher layout. Now users can create events on the Home tab, the Chatter tab, and record detail pages, without administrator setup.



## Default Action Lets Users Ask Questions in Chatter

We've added a new default action for questions. Now users can ask questions on the Home tab, the Chatter tab, and record detail pages in the full Salesforce site, and on the Feed, in groups, and on record pages in Salesforce1.

For more information, see [Ask Questions in the Feed with Chatter Questions \(Beta\)](#).

## Monitor Your Organization's Usage-based Entitlements (Generally Available)

Track how much your organization is using a given entitlement, such as the number of logins to a customer community each month. Usage-based entitlements were formerly a beta feature.

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

To see your organization's usage-based entitlements, from Setup, click **Company Profile > Company Information**. In the Usage-based Entitlements related list:

- The Amount Used column (1) shows how much of the allowance your organization has used.
- The Usage Date column (2) shows when your usage was last updated.

Usage-based Entitlements							Usage-based Entitlements Help ?	
Resource	Resource ID	Start Date	End Date	Frequency	Allowance	Amount Used <sup>1</sup>	Usage Date <sup>2</sup>	
Records for Data.com List Users	0000866166	3/20/2014	3/20/2015	Once	250	200	5/20/2014	
Customer Community Members	(tenant)	3/20/2014	3/20/2015	Monthly	100	20	5/20/2014	
Partner Community Logins	(tenant)	3/20/2014	3/20/2015	Monthly	200	100	5/20/2014	

## Data

The Force.com platform makes it easy for you to manage and track your data.

### **Retain Field History Data (Pilot)**

Storing data and how long to store it for have emerged as key concerns for our customers. We hear you and are responding with an improved Field History Retention pilot that lets you retain your data longer.

## Retain Field History Data (Pilot)

Storing data and how long to store it for have emerged as key concerns for our customers. We hear you and are responding with an improved Field History Retention pilot that lets you retain your data longer.

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

As the first part of a larger data life cycle management initiative, salesforce.com is continuing the pilot that began in Winter '14. Use the Salesforce Metadata API to define a retention policy for your field history. Then use the REST API, SOAP API, and Tooling API to work with your archived data.

The pilot lets you define a retention policy for field history in these Salesforce objects:

- Accounts
- Cases
- Contacts
- Leads
- Opportunities

The pilot also supports setting policies for custom objects.

Salesforce.com will eventually move toward a policy of deleting field history data that is older than 18 months, which is why actively specifying your own history retention policies will become important for your organization.

To learn more about the pilot, see the [Field History Retention Implementation Guide](#).

For more information about joining the pilot, contact your account team or Customer Support.

## Business Logic and Process Automation

Workflow, approvals, and Visual Workflow provide point-and-click tools for automating and simplifying complex business processes.

Visual Workflow is available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Approvals are available in: **Enterprise, Performance, Unlimited, and Developer** Editions, and for an additional cost in: **Professional** Edition

Workflow is available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions, and for an additional cost in: **Professional** Edition

Workflow tasks, email alerts, and flow triggers are not available in **Database.com**

### Workflow

- [Workflow Target User Merge Fields for Email Templates \(Beta\)](#)

Workflow email alerts for the User object can reference fields from the user record that triggered the workflow rule. When creating or editing email templates in Salesforce, the Select Field Type drop-down list now contains the Workflow Target User option.

- [Flow Triggers Can Pass Previous Record Values into sObject Variables \(Pilot\)](#)

A new value is available for setting a flow's sObject variable from a flow trigger workflow action. Enter `{!old}` to use the most recent previous values of the record that was edited to cause the workflow rule to fire.

- [Default Workflow User is Notified When Email Alerts Approach or Exceed Limits](#)

When workflow email alerts approach or exceed certain limits, Salesforce sends a warning email to the default workflow user or—if the default workflow user isn't set—to an active system administrator.

- [Verify Formula References to Custom Fields in Workflow Rule Criteria and Workflow Actions](#)

Previously, when an object had two custom fields with the same name—one with a namespace prefix (`abc__Expense__c`) and one without (`Expense__c`)—formulas in workflow rule criteria and workflow actions that reference the custom field without the namespace prefix would incorrectly access the custom field with the namespace prefix.

- **Increased Limits for Total Rules**

The limits for the total number of rules were raised.

## Approvals

- **Expanded Approval History Reports**

You can now run reports on completed and in-progress approval processes and their steps. Previously, reports were available only for pending approval requests. We also made more fields and objects that contain approval history data available via SOQL queries.

- **Submit Records for Approval from within the Salesforce1 App**

Users can now submit records for approval from the Salesforce1 app.

- **Submit Records for Approval from a Flow (Pilot)**

You can now submit records for approval from a flow. Because approval processes are fully configured in Salesforce, you only need to identify the ID of the record that you want to submit. Optionally, you can add submission comments.

## Visual Workflow

- **Changes to Trigger-Ready Flows**

A trigger-ready flow is a flow that can be launched without user interaction. Formerly available only via a pilot program for launching flows from workflow rules, there are new methods of launching a trigger-ready flow. We've also updated the list of elements and resources that trigger-ready flows can contain.

- **Manipulate Multiple Salesforce Fields and Records at One Time in a Flow (Generally Available)**

Collect the values for multiple fields for Salesforce records with a single query, and manipulate that data with a single DML statement by using sObject variables, sObject collection variables, and loops in a flow. In Spring '14, this functionality was available only with a pilot program.

- **Cross-Object Field References in Flows**

When building a flow, you can now reference fields for records that are related to the values that are stored in an sObject variable. To do so, you must manually enter the references. You can reference cross-object fields to use their values anywhere you can reference a flow resource or enter a value.

- **Use an Object-Specific or Global Action in a Flow**

As an alternative to Record or Fast elements, flows can now use object-specific and global actions to create and update Salesforce records. Set the input assignments to transfer data from the flow to the action.

- **Send Email from a Flow**

You now have two options for sending email from a flow: call an existing workflow email alert or configure the email within the flow.

- **Submit Records for Approval from a Flow (Pilot)**

You can now submit records for approval from a flow. Because approval processes are fully configured in Salesforce, you only need to identify the ID of the record that you want to submit. Optionally, you can add submission comments.

- **Governor Limits Enforced on All Flows**

Previously, flows could potentially consume more resources than are allowed by our governor limits, such as the number of DML statements or SOQL queries issued in a single transaction. Create, update, and delete elements issue DML statements, and lookup elements issue SOQL queries. This critical update more strictly enforces governor limits on flows.

- **Flow Formulas Can Resolve to Non-Numeric Values**

Formula resources in flows no longer need to return a numeric value.

- **Date/Time Values in the Cloud Flow Designer Include GMT Offset**

At runtime, time zones for date/time values may differ from what you see in the Cloud Flow Designer. During runtime, date/time values reflect the running user's time zone settings in Salesforce. In the Cloud Flow Designer, date/time values reflect the time zone set on your computer. For your reference, the Cloud Flow Designer appends the GMT offset to your date/time value.

### **Submit Records for Approval from a Flow (Pilot)**

You can now submit records for approval from a flow. Because approval processes are fully configured in Salesforce, you only need to identify the ID of the record that you want to submit. Optionally, you can add submission comments.

## **Workflow Target User Merge Fields for Email Templates (Beta)**

Workflow email alerts for the User object can reference fields from the user record that triggered the workflow rule. When creating or editing email templates in Salesforce, the Select Field Type drop-down list now contains the Workflow Target User option.

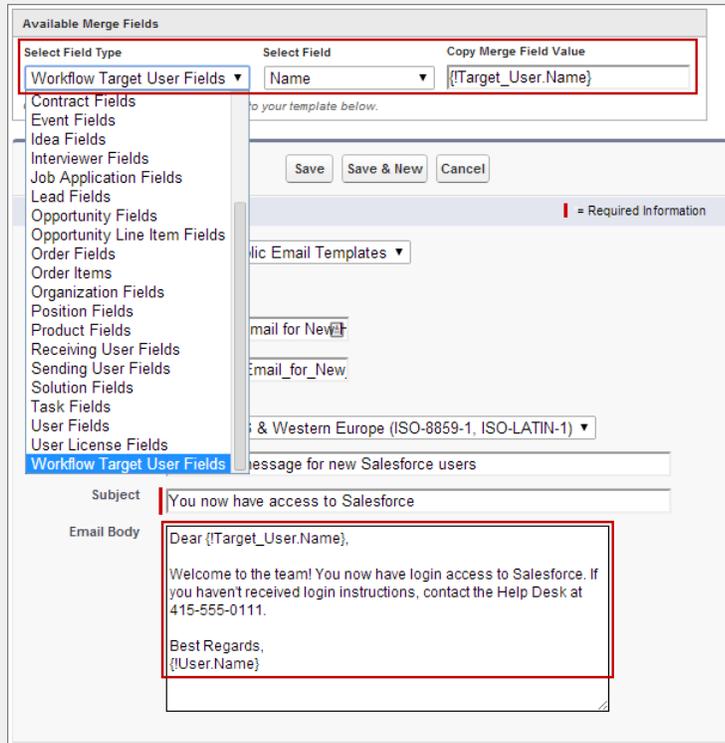


**Note:** This release contains a beta version of workflow on the User object that is production quality but has known limitations. To provide feedback and suggestions, go to [IdeaExchange](#).

To use merge fields from user records in email templates, select from the following merge field types:

- **User Fields**—Use these merge fields to represent the sending user. Merge fields named `{!User.field_name}` return values from the user record of the person who created or updated the record that triggered the workflow rule.
- **Workflow Target User Fields**—Use these merge fields only in email templates for workflow rules on the User object. Merge fields named `{!Target_User.field_name}` return values from the user record that was created or updated to trigger the workflow rule.

For example, if you have a workflow rule that emails new employees when their user records are created, you could use the following email template to reference both the name of the employee and the person who created the user record.



## Default Workflow User is Notified When Email Alerts Approach or Exceed Limits

When workflow email alerts approach or exceed certain limits, Salesforce sends a warning email to the default workflow user or—if the default workflow user isn't set—to an active system administrator.

When...	Salesforce Sends...	Warning Email Includes...
An email alert isn't sent because the number of recipients exceeds the limit for a single email	A warning email for each unsent email alert	The unsent email alert's content and recipients
The organization reaches 90% of the limit of emails per day	One warning email	The limit and the organization's usage
The organization reaches 90% of the limit of workflow emails per day	One warning email	The limit and the organization's usage
An email alert isn't sent because the organization reaches the limit of emails per day	A warning email after every 100 attempted email alerts over the limit	The limit and the organization's usage

When...	Salesforce Sends...	Warning Email Includes...
An email alert isn't sent because the organization reaches the limit of workflow emails per day	A warning email after every 100 attempted email alerts over the limit	The limit and the organization's usage

For example, the default workflow user could receive a warning email with this message:

```
Your organization (AW Computing) has almost reached the limit of 2,000,000 workflow emails per day. The number of emails already sent is 1,800,000.
```

## Flow Triggers Can Pass Previous Record Values into sObject Variables (Pilot)

A new value is available for setting a flow's sObject variable from a flow trigger workflow action. Enter `{!old}` to use the most recent previous values of the record that was edited to cause the workflow rule to fire.



### Note:

- Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact salesforce.com.
- Similar to `{!this}`, `{!old}` can be assigned only to sObject variables.
- Unlike `{!this}`, `{!old}` can't be selected by clicking . You must manually enter `{!old}` in the Value column.

A flow that is launched by a flow trigger workflow action can now easily access both the current and most recent previous values of the record that was edited to cause the workflow rule to fire. The flow just needs two sObject variables that have:

- the same object type as the flow trigger
- the Input/Output Type set to allow input access

When setting those sObject variables from the flow trigger:

- Enter `{!this}` to specify the current values of the record that was edited to cause the workflow rule to fire.
- Enter `{!old}` to specify the record's values from immediately before it was edited to cause the workflow rule to fire.

If the record was newly created, `{!old}` is null.

This screenshot shows how you would set flow sObject variables to access both the current and most recent previous values of the record that was edited to cause the workflow rule to fire.

**Edit Flow Trigger** ! = Required Information

Name: Launch Lead Convert

Unique Name: Launch\_Lead\_Convert

Object: Lead

Flow: Lead\_Convert

Set Flow Variables

Select the name of the flow variable or sObject variable. Then enter a literal value, or click the lookup icon to insert a field.

Name	Value	
1 sOv_Lead_Current	{!this}	Clear
2 sOv_Lead_Previous	{!old}	Clear

[Set Another Variable](#)

1. Enter `{!this}` as the value for the sObject variable that you want to contain the current values.
2. Enter `{!old}` as the value for the sObject variable that you want to contain the most recent previous values.

## Expanded Approval History Reports

You can now run reports on completed and in-progress approval processes and their steps. Previously, reports were available only for pending approval requests. We also made more fields and objects that contain approval history data available via SOQL queries.



**Note:** After Summer '14 is available for your organization, it may take a few weeks before your organization's approval history data becomes available. During those initial weeks, approval history reports may not return all possible data. Also, some data from previously completed and currently pending approval processes may never be reflected in the approval history. For details, see [Considerations for Approval History Reports](#) on page 212.

You can now create a custom report type with primary object Process Instance and related object Process Instance Node. A process instance represents one instance of an approval process. A new process instance is created each time a record is submitted for approval. A process instance node represents an instance of an approval step. A new process instance node is created each time a record enters a step in an approval process. No process instance node is created when the record doesn't meet the step criteria or if the approval process instance is otherwise completed without entering the step.

After you create the custom report type, you can create and run approval history reports. For example, use approval history reports to:

- See how long (maximum, minimum, or average time) it takes for your users to complete an approval process or a particular step in an approval process.
- See all pending approval process instances with a view of which ones are waiting at a specific approval step.
- See all approval processes that were completed for an object or a specific record, and filter the results for a specific range of dates.

Additional details—such as specific approval requests that are made within each approval step—are available via SOQL queries of the following objects. (You can even create a Visualforce page or other custom UI to act as a management console for approvals in your organization.)

- ProcessDefinition
- ProcessInstance
- ProcessInstanceHistory
- ProcessInstanceNode
- ProcessInstanceStep

- ProcessInstanceWorkitem
- ProcessNode

### Report Example: Approval Steps—Elapsed Times

This sample report displays all approval process instances (1) and groups results by approval process name (2) and record name (3). The results are sorted by step name (4) and include step status (5), step start date (6), step elapsed minutes (7), step completed date (8), and approval process instance ID (9).

**All Approvals—Step Elapsed Times** Help for this Page ?

Report Generation Status: Complete

Report Options:

Summarize information by: Show **1**  
 Approval Process: Name (dropdown) All process instance (dropdown)

Time Frame  
 Date Field Submitted Date (dropdown) Range Custom (dropdown)  
 From (input) To (input)

Run Report (dropdown) Hide Details Customize Save Save As Delete Printable View Export Details

Grouped By: **2** Approval Process: Name Record Name **3**  
 Sorted By: Approval Process: Name (dropdown) Record Name (dropdown)

<b>4</b> Step: Name	<b>5</b> Step Status	<b>6</b> Step Start Date	<b>7</b> Step Elapsed Minutes	<b>8</b> Step Completed Date	<b>9</b> Approval Process Instance ID
Approval Process: Name: <u>Oppty Approval Process</u> (36 records)					
Record Name: <u>ABC - 10 Laptops</u> (1 record)					
Step 1	Recalled	5/6/2014 1:50 PM	2	5/6/2014 1:52 PM	04gD0000000LvIQ
Record Name: <u>ABC Labs - 9 Spider 2 Series Laptops</u> (2 records)					
Step 1	Approved	5/6/2014 1:51 PM	5	5/6/2014 1:56 PM	04gD0000000LvIV
Step 2	Pending	5/6/2014 1:56 PM	-	-	04gD0000000LvIV
Record Name: <u>Acme - 600 Desktops</u> (4 records)					
Step 1	Approved	5/6/2014 1:51 PM	15	5/6/2014 2:06 PM	04gD0000000LvIa
Step 2	Approved	5/6/2014 2:06 PM	299	5/6/2014 7:05 PM	04gD0000000LvIa
Step 3	Approved	5/6/2014 7:05 PM	56	5/6/2014 8:01 PM	04gD0000000LvIa
Step 4	Approved	5/6/2014 8:01 PM	5	5/6/2014 8:06 PM	04gD0000000LvIa
Record Name: <u>Acme - 700 Desktops</u> (1 record)					
Step 1	Recalled	5/6/2014 1:51 PM	2	5/6/2014 1:52 PM	04gD0000000LvIf
Record Name: <u>Canson - 15 Spider Series 3 Laptops</u> (1 record)					
Step 1	Pending	5/6/2014 1:51 PM	-	-	04gD0000000LvIb
Record Name: <u>Canson - 18 Spider 3 Series Laptops</u> (1 record)					
Step 1	Rejected	5/6/2014 1:51 PM	316	5/6/2014 7:07 PM	04gD0000000LvIc
Record Name: <u>Canson - Laser free memory upgrade</u> (4 records)					
Step 1	Approved	5/6/2014 1:51 PM	315	5/6/2014 7:06 PM	04gD0000000LvIW
Step 1	Approved	5/6/2014 7:06 PM	0	5/6/2014 7:08 PM	00000000LvIW

Notice that the previous sample report doesn't include the approvers for each step and the elapsed time for each approval request. To get this information, you need to run a SOQL query by using the approval process instance ID from the report.

The following sample SOQL query obtains the ActorID (user or queue that received the approval request) and the ElapsedTimeInHours (elapsed time since the approval request was sent) for the first pending step in the report.

```
SELECT ActorId, ElapsedTimeInHours FROM ProcessInstanceWorkitem where processInstanceId = '04gD0000000LvIV'
```

Query Results - Total Rows: 1	
ActorId	ElapsedTimeInHours
005D00000015vGGIAY	29.820833333333333

The sample query has only one result, and you can view that approver's user profile page by appending the resulting ActorID to the organization's base URL (<https://MyCompany.salesforce.com/005D00000015vGGIAY>), which gets redirected to the user profile page.

## Considerations for Approval History Reports

Understand the limitations and special behaviors when you create or view approval history reports, which provide a detailed history of approval processes and steps.

### Considerations for Approval Process Instances that are Completed Before or are Pending During the Summer '14 Rollout

When Summer '14 becomes available for your organization, the approval history data is automatically populated for completed and pending approvals. However, some approval history field values are never populated or are populated only after the approval

process instance is next acted upon—such as when a user approves, rejects, or reassigns an approval request—after the Summer '14 rollout.

Object	When Fields are Populated
Process Instance	<p>For approval process instances that were completed before the Summer '14 rollout, all Process Instance fields are automatically populated, with one exception: <code>Completed Date</code> is never populated for approval process instances that were completed before January 1, 2013.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all Process Instance fields are automatically populated, with two exceptions: <code>Completed Date</code> and <code>Last Actor: Full Name</code> are populated only after the approval process instance is complete.</p>
Process Instance Node	<p>Never populated for approval process instances that were completed before the Summer '14 rollout.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all Process Instance Node fields are populated only after the approval process instance is next acted upon after the Summer '14 rollout.</p>

Additional exceptions apply to approval history data that is available via SOQL queries of the following objects.

Object	When Fields are Populated
ProcessInstance	<p>For approval process instances that were completed before the Summer '14 rollout, all Process Instance fields are automatically populated, with one exception: <code>CompletedDate</code> is never populated for approval process instances that were completed before January 1, 2013.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all ProcessInstance fields are automatically populated, with two exceptions: <code>CompletedDate</code> and <code>LastActorId</code> are populated only after the approval process instance is complete.</p>
ProcessInstanceNode	<p>Never populated for approval process instances that were completed before the Summer '14 rollout.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all ProcessInstanceNode fields are populated only after the approval process instance is next acted upon after the Summer '14 rollout.</p>
ProcessInstanceStep	<p>Never populated for approval process instances that were completed before the Summer '14 rollout.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all ProcessInstanceStep fields are populated only after the approval process instance is next acted upon after the Summer '14 rollout.</p>
ProcessInstanceWorkitem	<p>Never populated for approval process instances that were completed before the Summer '14 rollout.</p> <p>For approval process instances that were pending during the Summer '14 rollout, all ProcessInstanceWorkitem fields are populated after the approval process instance is next acted upon after the Summer '14 rollout, with three exceptions: <code>ElapsedTimeInDays</code>, <code>ElapsedTimeInHours</code>, and <code>ElapsedTimeInMinutes</code> fields are never populated in ProcessInstanceWorkitem records for which equivalent ProcessInstanceStep records were created before the Summer '14 rollout.</p> <p>For all other ProcessInstanceWorkitem records, these three fields are populated after the approval process instance is next acted upon after the Summer '14 rollout.</p>

Object	When Fields are Populated
	 <p><b>Note:</b> Because ProcessInstanceHistory combines fields from ProcessInstanceStep and ProcessInstanceWorkitem, you may notice incorrect elapsed times of 0 in ProcessInstanceHistory records because the elapsed time fields were never populated in the related ProcessInstanceWorkitem record.</p>

### Considerations for the Sandbox Environment

If you copy approval history data to a sandbox, some field values are overwritten and won't reflect the actual approval history.

Object	Field	When an Existing Process Instance or Process Instance Node Record is Copied to a Sandbox...
Process Instance	Submitted Date	This value is overwritten by the date and time when the process instance record is copied to the sandbox.
	Submitter: Full Name	This value is overwritten by the name of the user who copied the process instance record to the sandbox.
Process Instance Node	Step Start Date	This value is overwritten by the date and time when the process instance node record is copied to the sandbox.

## Changes to Trigger-Ready Flows

A trigger-ready flow is a flow that can be launched without user interaction. Formerly available only via a pilot program for launching flows from workflow rules, there are new methods of launching a trigger-ready flow. We've also updated the list of elements and resources that trigger-ready flows can contain.

### New Methods of Launching Trigger-Ready Flows

You can now launch a trigger-ready flow with these new methods, which are generally available.

- The Apex `start()` method
- A custom button or link
- The flow URL
- The **Run** button in the Cloud Flow Designer

Formerly, you could only launch a trigger-ready flow with a flow trigger workflow action. Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

### Updated Run Restrictions

A trigger-ready flow can now contain Apex Plug-in elements, but it can no longer contain choice or dynamic choice resources. Here's a full list of the elements and resources that aren't supported in trigger-ready flows.

- Choice resources
- Dynamic Choice resources
- Screen elements
- Step elements

Run restrictions are now determined by the flow's active version—or the latest version, if there's no active version. If the active or latest version includes restricted elements or resources, that flow is not trigger-ready and it has a run restriction

of “No triggers”. If the active or latest version doesn’t include any restricted elements or resources, the flow is trigger-ready and it has no run restrictions.

## Manipulate Multiple Salesforce Fields and Records at One Time in a Flow (Generally Available)

Collect the values for multiple fields for Salesforce records with a single query, and manipulate that data with a single DML statement by using sObject variables, sObject collection variables, and loops in a flow. In Spring ’14, this functionality was available only with a pilot program.

DML statements make changes to the Salesforce database by adding, updating, or deleting records. For information about the per-transaction limits for DML statements and queries, see [“Understanding Execution Governors and Limits”](#) in the *Force.com Apex Code Developer’s Guide*.

### Store multiple field values for a Salesforce record in one variable.

An *sObject variable* is a container that can store values for multiple fields for a single Salesforce record.

Previously, you had to use one flow variable for each individual field value that you want to store.

### Store multiple field values for multiple Salesforce records in one variable.

An *sObject collection variable* is a container for an ordered group of related items. An individual *item* in a collection is similar to an sObject variable, as it contains the field values for one Salesforce record. To store field values in an sObject collection variable, use a Fast Lookup element. For example, if you create an Account-based collection and your query returns three records, the collection contains three items. The first item in the collection contains field values from the first account returned, the second item contains the second account record’s values, and so on.

Previously, you had to use one flow variable for each individual field value that you want to store.

### Use a single query to look up multiple field values.

The new *Fast Lookup* element uses a single query to obtain multiple field values for one Salesforce record (when storing values in an sObject variable) or multiple Salesforce records (when storing values in an sObject collection variable).

Previously, you had to obtain field values using Record Lookup elements. A Record Lookup element uses one variable for each individual field value that you want to store. To store field values for multiple records with Record Lookup elements, you must use one Record Lookup element for each individual record.

### Use a single DML statement and a single variable to create Salesforce records.

The new *Fast Create* element adds records to the Salesforce database by using the field values stored in an sObject variable (one record) or sObject collection variable (one or more records). For example, when you use a Fast Create element that references an sObject collection, the flow creates one record for each item in the collection.

Previously, you had to use a Record Create element to create Salesforce records from a flow. With a Record Create element, you can create only one record at a time and you must identify the fields and their values individually.

### Use a single DML statement and a single variable to update, or delete Salesforce records.

The new *Fast Update* and *Fast Delete* elements make changes to the Salesforce database by using the field values stored in an sObject variable (one record) or sObject collection variable (one or more records). For example, when you use a Fast Delete element that references an sObject collection, the flow deletes all the records whose IDs are stored in the collection.

Previously, you had to use Record Update and Record Delete elements to update or delete Salesforce records from a flow. With a Record Update element, you can update multiple records at a time, but you must identify the fields and their values individually.

Whereas each Record Update and Record Delete element uses one query and one DML statement, each Fast Update and Fast Delete element uses only one DML statement. With Fast elements, you can combine the results of multiple queries and perform a single DML statement against those results rather than performing a DML statement for every query.

### Examine the values for a collection of Salesforce records.

A *loop* examines each item in a collection and executes actions on them based on the elements in the flow. For each item that the loop examines, the item's field values are copied into an sObject variable, which you identify when you create the loop. The elements within the loop can examine and update the contents of the sObject variable—not the collection item itself.

You can't update items in a collection. However, as the loop iterates through each collection item, the loop can modify the data in the loop variable. The loop can then add the contents of the loop variable to a new collection before moving on to the next item.

To add items to an existing collection, use an Assignment element. If you populate an existing sObject collection variable by using a Fast Lookup or Record Lookup element, all the previous collection items are deleted and replaced by the new items, even if they contain completely different fields.

You can't remove items from an existing collection. Instead, loop through the collection and add the items you want to keep to a new collection. Use a Decision element to differentiate between the items you want to add to the new collection and the items you don't want to add to the new collection.

To try out these new elements and resources, from Setup click **Create > Workflow & Approvals > Flows** and open a new or existing flow.

## Changes Since Spring '14

sObject variables, sObject collection variables, Fast Lookup/Create/Update/Delete elements, and Loop elements were formerly available through a pilot program. Here's what's changed since then.

- These elements and resources are now available in all flows. In Spring '14, they were available only in trigger-ready flows.
- Values for sObject variables and sObject collection variables can be set or retrieved through Visualforce and Apex. These values cannot be set through URL parameters.

## Sample Flow that Loops through a Collection

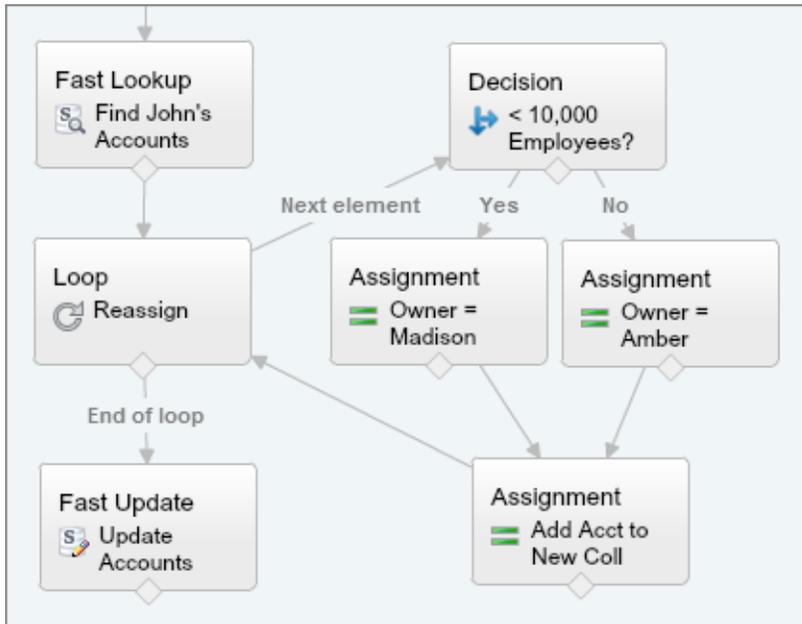
This example demonstrates how to use sObject collection variables and a loop to transfer ownership of accounts from one user to another. The flow already has the required user IDs.

First, create an Account-based sObject collection variable called `collAcctJSmith` and populate it with all account records that John Smith owns.

Then create a loop that iterates through the collection. For each item in the collection, the loop does the following:

1. Assigns the collection item to the loop variable.
2. Evaluates whether or not the account has more than 10,000 employees.
3. Assigns Madison's user ID to the `OwnerId` field in the loop variable if the account has more than 10,000 employees.
4. Assigns Amber's user ID to the `OwnerId` field in the loop variable if the account doesn't have more than 10,000 employees.
5. Adds the loop variable's values as a new item in a second collection called `collReassignedAccts`.

Finally, create a Fast Update element to update the accounts in `collReassignedAccts` with the new `OwnerId` after the loop finishes iterating through the collection.



This section of the flow uses a single query to look up the list of accounts and a single DML statement to update those accounts. If you created a similar flow by using Record Update elements, you would use:

- One Record Update element to find all accounts that were owned by John and had more than 10,000 employees (1 query) and then update those records' `OwnerId` to Madison's Id (1 DML statement).
- One Record Update element to find all accounts that were owned by John and didn't have more than 10,000 employees (1 query) and then update those records' `OwnerId` to Amber's Id (1 DML statement).

## Cross-Object Field References in Flows

When building a flow, you can now reference fields for records that are related to the values that are stored in an `sObject` variable. To do so, you must manually enter the references. You can reference cross-object fields to use their values anywhere you can reference a flow resource or enter a value.

### Implementation Tips

If a flow interview encounters a null value at any point in the cross-object expression, the element containing the reference fails. The reference runs successfully if the last field value in the expression is `null`. For example, if you store a contact in `{!sObjContact}` and try to reference `{!sObjContact}.Account.Name`, the flow will fail if `AccountId` on the stored contact is `null` (because there isn't an account to look at), but it won't fail if `Name` on the related account is `null`. If an element contains a cross-object reference that fails and the element doesn't have a fault path defined, the entire interview fails. To avoid this, you can:

- Make the fields that you want to reference in the expression required in Salesforce. For example, for the expression `{!sObjContact}.Account.Name`, you could require `AccountId` on contact page layouts. Then use another flow to find any records with null values for that field and update them.
- Determine whether each field that's referenced in the expression has a value by using the `wasSet` operator in a Decision element.

Cross-object field references in flows don't count against your organization's limits for:

- Cross-object relationships per object
- DML operations per transaction

## Syntax

To reference a field on a related record, use this syntax.

```
{!sObjectName1.objectName2.fieldName}
```

where:

- *sObjectName1* is the unique name for the sObject variable that you want to start from.
- *objectName1* is the API name for an object that's related to *sObjectName1*'s object type. The API names for all custom objects end in `__r`.
- (Optional) *objectName2* is the API name for an object that's related to *objectName1*.

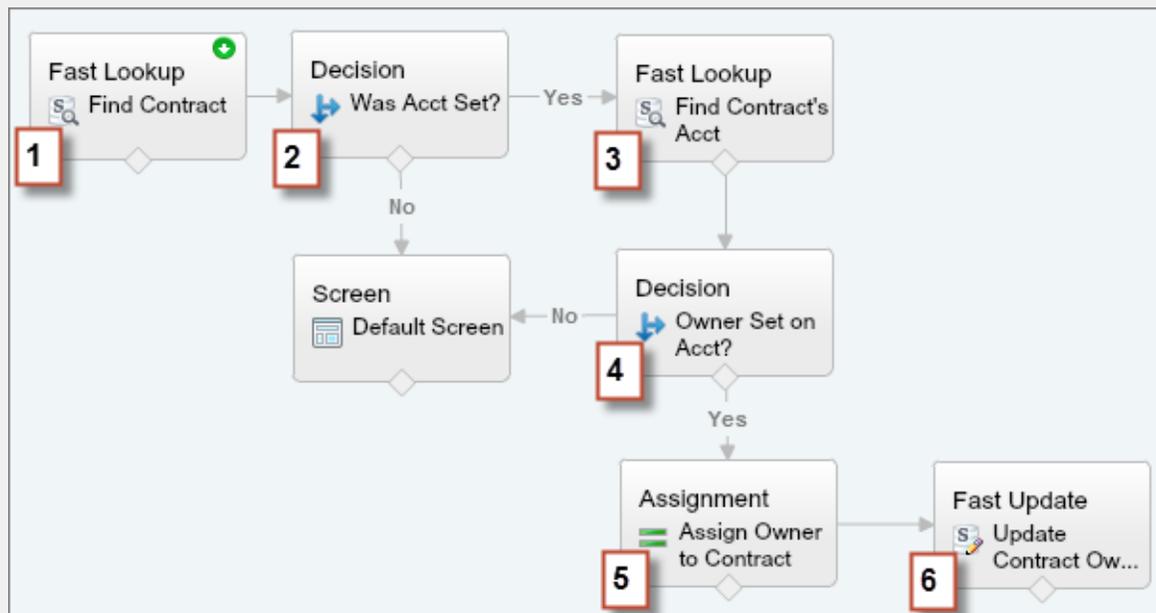
Your expression must include at least one object name, but you can add more objects as needed.

- *fieldName* is the name for the field that you want to reference on the last object in the expression. The API names for all custom fields end in `__c`.

For example, `{!sOv_Contact.Account.Id}` references `Id` of the account that's related to the contact record represented by an sObject variable in the flow.

When you create an sObject variable from which you plan to reference fields on related records, you must store the ID field value for the first related record in the sObject variable. For example, if you want to reference an opportunity's contract, you must store `ContractId` in the sObject variable or add a value for `ContractId` by using an Assignment element.

For example, to update a contract's owner to be the contract's account's owner:



1. Use a Fast Lookup element to store the contract's fields, including `AccountId`, in an sObject variable called `varContract`.
2. Use a Decision element to verify that the value of `AccountId` was set in `varContract`.

3. Use a Fast Lookup to store the fields for the contract's account, including `OwnerId`, in another `sObject` variable called `varAccount`.
4. Use a Decision element to confirm that the value of `OwnerId` was set in `varAccount`.
5. Use an Assignment element to specify `{!varContract.Account.OwnerId}` as the value for `{!varContract.OwnerId}`.
6. Use a Fast Update element to write the values in `varContract`, including the updated `OwnerId` value, to the contract in Salesforce.

## Send Email from a Flow

You now have two options for sending email from a flow: call an existing workflow email alert or configure the email within the flow.

With an Email Alert element, you only need to associate the email with a record. Workflow email alerts are configured in Salesforce, and they already have a set email template, list of recipients, and sender. The Palette displays each workflow email alert that exists in your organization.

Record ID	<input type="text" value="{!storeAccount.Id}"/>
-----------	---

With the Send Email element, you need to provide the subject, body, list of recipients, and sender for the email. Nothing about this email has been previously configured, so you can completely customize the email in your flow. The Palette displays one Send Email element.

Email Addresses	<input type="text" value="{!storeAccount.OwnerId}"/>
Body	<input type="text" value="{!emailbody}"/>
Subject	<input type="text" value="AR: An Account You Own is Red"/>
Sender Type	<input type="text" value="DefaultWorkflowUser"/>

1. From Setup, click **Create** > **Workflow & Approvals** > **Flows**, and open a new or existing flow.
2. In the Palette, find the email element that you want to call.
  - To call a workflow email alert, click  and select EMAIL ALERTS. Optionally, type three or more letters to search for a specific email alert.
  - To customize an email in the flow, type Send next to .
3. Drag the email element that you want onto the canvas, and fill in the general settings and input parameters.

## Submit Records for Approval from a Flow (Pilot)

You can now submit records for approval from a flow. Because approval processes are fully configured in Salesforce, you only need to identify the ID of the record that you want to submit. Optionally, you can add submission comments.



**Note:** Submit for Approval actions in a flow are currently available through the “Launch Flows from Workflow Rules” pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

If a flow submits a record for approval, the user who launched the flow is the submitter. If a workflow rule triggers a flow that submits a record for approval, the user who triggered the workflow rule (by creating or editing a record) is the submitter. When the record is approved or rejected, the user who launched the flow or triggered the workflow rule is notified.

This action call succeeds only for approval processes where the approver on submit is determined automatically and the user who launched the flow is an allowed initial submitter on the approval process that runs. If the executed approval process

requires the submitter to manually choose the approver or if the user who launches the flow isn't an allowed initial submitter on the approval process that runs, the flow interview fails and the user who launched the flow sees an error. Make sure that the approver on submit is determined automatically and that the initial submitters for the approval processes related to this object include all users who could launch this flow. For details, see "Creating Approval Processes" in the Salesforce Help.

Consider using a fault connector path to gracefully handle these errors.

1. From Setup, click **Create > Workflow & Approvals > Flows** and open a new or existing flow.
2. In the Palette, type `Submit` next to .
3. Drag the `Submit for Approval` element onto the canvas.
4. Fill in the general settings and input parameters.

## Use an Object-Specific or Global Action in a Flow

As an alternative to Record or Fast elements, flows can now use object-specific and global actions to create and update Salesforce records. Set the input assignments to transfer data from the flow to the action.

1. From Setup, click **Create > Workflow & Approvals > Flows** and open a new or existing flow.
2. Find the action that you want to call.
  - a. In the Palette, click  and select **OTHER ACTIONS**.  
The Palette displays only the object-specific and global actions in your organization.
  - b. Optionally, type three or more letters to search for a specific action.
3. Drag the action onto the canvas, and fill out the general settings and input parameters.  
The layout for the action determines which parameters are required.

## Governor Limits Enforced on All Flows

Previously, flows could potentially consume more resources than are allowed by our governor limits, such as the number of DML statements or SOQL queries issued in a single transaction. Create, update, and delete elements issue DML statements, and lookup elements issue SOQL queries. This critical update more strictly enforces governor limits on flows.

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

Available for additional cost in: **Professional** Edition

User Permissions Needed	
To view critical updates:	"View Setup and Configuration"
To activate critical updates:	"Modify All Data"
	AND
	"Customize Application"

Flows launched from a workflow rule are executed with the other workflow actions as part of the larger transaction. Flows with screen elements can span multiple transactions; a new transaction begins each time the user clicks **Next**. Flow trigger workflow actions are currently available through a pilot program. For information on enabling this feature in your organization, contact [salesforce.com](https://salesforce.com).

If you activate this update now, governor limits will be enforced on all executed flows. Otherwise, this will be enabled for your organization on the auto-activation date.

We recommend that you activate this update now and test your flows to identify any that violate the governor limits. If you encounter any errors, you can deactivate this update, modify the flows so that they don't violate the limits, and then reactivate the update.

To modify your flows to be more efficient:

- You can examine DML statements and SOQL queries throughout your flow and determine whether you could combine multiple operations into fewer create, update, delete, and lookup elements. For example, if your flow updates a field on a record and later updates another field on that record, consider whether you could update both fields simultaneously within the same Record Update or Fast Update element.
- You can also perform one DML statement or SOQL query on multiple records by using an sObject collection variable with a Fast Create, Fast Lookup, Fast Update, or Fast Delete element.

For more information about the governor limits, see “Understanding Execution Governors and Limits” in the *Force.com Apex Code Developer's Guide*.

## Other Business Logic and Process Automation Changes

There are other important enhancements to workflow, approvals, and Visual Workflow.

### Verify Formula References to Custom Fields in Workflow Rule Criteria and Workflow Actions

Previously, when an object had two custom fields with the same name—one with a namespace prefix (`abc__Expense__c`) and one without (`Expense__c`)—formulas in workflow rule criteria and workflow actions that reference the custom field without the namespace prefix would incorrectly access the custom field with the namespace prefix.

Now these formulas reference the correct custom fields, but this correction may change the behavior of your workflow rules and actions—for both workflow rules and approval processes. We strongly recommend that you check all formulas in your workflow rules and actions for any references to custom fields that need a namespace prefix. Specifically, for each formula reference to a custom field:

1. Verify that no other custom fields for the same object have the same name.
2. If other custom fields have the same name, determine which one is the correct custom field for the formula to reference.
3. If the correct custom field has a namespace, make sure the formula reference includes that namespace.

### Increased Limits for Total Rules

The limits for the total number of rules were raised:

- From 300 to 500 per object
- From 1,000 to 2,000 per organization

These limits apply to any combination of active and inactive workflow, assignment, auto-response, and escalation rules.



**Important:** The limit for active rules hasn't changed and remains at 50 rules per object.

### Flow Formulas Can Resolve to Non-Numeric Values

Formula resources in flows no longer need to return a numeric value. The following data types are supported.

- Boolean
- Currency

- Date
- Date/Time
- Number
- Text

### **Date/Time Values in the Cloud Flow Designer Include GMT Offset**

At runtime, time zones for date/time values may differ from what you see in the Cloud Flow Designer. During runtime, date/time values reflect the running user's time zone settings in Salesforce. In the Cloud Flow Designer, date/time values reflect the time zone set on your computer. For your reference, the Cloud Flow Designer appends the GMT offset to your date/time value.

For example, if your computer's time zone is set to Pacific Standard Time and you create a variable `MidYear` with a date/time value of `05/31/2014 11:59 PM`, the Cloud Flow Designer appends `GMT -8:00` when displaying that value on your computer. When a flow that displays `MidYear` is run by a user whose time zone is set to Pacific Standard Time in Salesforce, `05/31/2014 11:59 PM` appears. When a flow that displays `MidYear` is run by a user whose time zone is set to Eastern Standard Time in Salesforce, `05/31/2014 02:59 AM` appears.

## Security

Use security to protect both your data and applications.

### ***Password Changes Improve Organization Security***

Now additional options help to improve your organization's security.

### ***Force Logout On Session Timeout***

Prevent unwanted access to your organization using the `Force logout on session timeout` session setting.

### ***More Session Types Available for User Session Information***

See the session types of users logged into your organization.

### ***New Fields Available for User Session Information***

See the unique session IDs of users logged into your organization.

### ***App Launcher Available for More Profiles***

Previously, profiles cloned from a specific set of existing Force.com and Platform profiles only supported the App Launcher as a custom app. Now, administrators can add the App Launcher directly to those profiles.

### ***10 Identity Connect Licenses for New Developer Edition Organizations***

Developer Edition organizations now get 10 Identity Connect permission set licenses for testing and development.

### ***Cross-Domain Exchanges Switch to POST Requests***

For better security, organizations should send cross-domain session information using POST requests, instead of GET requests.

### ***Specify an Authorization Endpoint as a Request Parameter***

Send your user to a specific authorization endpoint.

### ***Get Custom Permissions in the Identity URL Response***

OAuth requests can use the `custom_permissions` scope to retrieve custom permissions associated with a connected app for an organization, and whether an individual user has each permission enabled.

**Community ID and URL Values Included in OAuth Responses**

Use OAuth to get a user's community ID and community URL values.

**Organization ID Allowed as a Salesforce Identity Provider Custom Attribute**

When using Salesforce as an identity provider, you can now pass the `organization_id` attribute in the SAML assertion.

**Identity Provider Logout URL Supported for External Users of a Community**

When logging out of a community, external users are redirected to the logout URL specified in the community's SAML settings, if the external user logged in using SAML for single sign-on.

**New Conditions for Access To Multiple Identity URLs With One Access Token**

One access token can provide access to more than one identity URL, but only if several conditions are met.

**OpenID Connect Discovery Endpoint Added**

Get information about Salesforce OpenID Connect support from a static URL.

**Improved Internet Explorer Browser Compatibility for Login Features**

Login hints and **Log in to a custom domain** are now available for older Internet Explorer browser versions.

**Log in to a Custom Domain Field Suggestions for Communities**

After users click on **Log in to a custom domain** on the Salesforce.com login page, and start typing, the page displays suggestions for completing a Communities URL.

**Microsoft Authentication Provider Support**

You can use Microsoft Access Control Service as an authentication provider using OAuth. Authorization is typically done by a Microsoft Office 365 service like Sharepoint® Online.

## Password Changes Improve Organization Security

Now additional options help to improve your organization's security.

Available in: <b>Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com Editions</b>
---

User Permissions Needed	
To set password policies:	"Manage Password Policies"

**Additional Password History Options: Remember Up to 24 Passwords**

Minimize password reuse by selecting up to 24 passwords to be remembered in the organization history.

**Longer Minimum Password Length Option**

Make passwords hard to hack by requiring a minimum password length of up to 12 characters.

**Uppercase and Lowercase Password Complexity Option**

Increase organization security by requiring both uppercase and lowercase letters in passwords.

**Minimum Password Lifetime Option**

Require a minimum password lifetime to prevent multiple resets in short periods of time.

## Additional Password History Options: Remember Up to 24 Passwords

Minimize password reuse by selecting up to 24 passwords to be remembered in the organization history.

Previously, administrators could limit user password reuse by selecting an option of up to 15 passwords remembered in an organization's history. Now administrators can select up to 24 passwords remembered. (The default remains 3 passwords remembered.) This option further reduces password reuse and can better protect organizations from improper access. To reset the password history option, from Setup, click **Security Controls > Password Policies** and select a value for **Enforce password history**.

## Longer Minimum Password Length Option

Make passwords hard to hack by requiring a minimum password length of up to 12 characters.

Administrators could previously require minimum password lengths of up to 10 characters but can now require a 12 character minimum length. (The default remains 8 characters.) A longer password presents more possible password combinations and helps protect an organization from improper access. To set the minimum password length, from Setup, click **Security Controls > Password Policies** and select a value for **Minimum password length**.

## Uppercase and Lowercase Password Complexity Option

Increase organization security by requiring both uppercase and lowercase letters in passwords.

Administrators can require that passwords contain alpha, numeric, and special characters. Now, administrators can also require that passwords include both uppercase and lowercase letters. More complex passwords improve organizational security. To set the password complexity requirements, from Setup, click **Security Controls > Password Policies** and select a value for **Password complexity requirement**.

## Minimum Password Lifetime Option

Require a minimum password lifetime to prevent multiple resets in short periods of time.

Previously administrators could require a maximum lifetime for a password, such as 90 days. Now administrators can also require that password lifetimes be a minimum of one day. If this option is selected, passwords can't be reset more than once during the minimum lifetime. To set the minimum password lifetime option, from Setup, click **Security Controls > Password Policies** and select **Require a minimum 1 day password lifetime**.

## Force Logout On Session Timeout

Prevent unwanted access to your organization using the `Force logout on session timeout` session setting.

Use the `Force logout on session timeout` setting in **Security Controls > Session Settings** to require that when sessions time out for inactive users, current sessions become invalid. Browsers are automatically refreshed and return to the login page. To access the organization again when this occurs, users must log in again.

This helps prevent unauthorized users from using an organization when someone has left an active session in a browser.



**Note:** Do *not* select `Disable session timeout warning popup` when enabling this option.

## More Session Types Available for User Session Information

See the session types of users logged into your organization.

Two additional session types can now be viewed in the User Session Information page:

- TempVisualforceExchange
- UserSite

TempVisualforceExchange is a temporary session used to switch to the Visualforce domain. UserSite is initiated when a Canvas app is invoked. To access user session detail, from Setup, click **Security Controls > Session Management**.

## New Fields Available for User Session Information

See the unique session IDs of users logged into your organization.

Two additional fields, **Session ID** and **Parent Session ID**, are now available in the User Session Information page. These fields help you to better manage specific user sessions by providing unique session ID information. For example, a user may have more than one session open, and you may want to end only one of them. The unique IDs help you to identify correct sessions on which to take action.

To access the page, from Setup, click **Security Controls > Session Management**. If you don't see the fields in your view, click **Create New View** and add them.

## App Launcher Available for More Profiles

Previously, profiles cloned from a specific set of existing Force.com and Platform profiles only supported the App Launcher as a custom app. Now, administrators can add the App Launcher directly to those profiles.

Available in: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions
---

User Permissions Needed	
To view app permissions:	"View Setup and Configuration"
To edit app permissions:	"Manage Profiles and Permission Sets"

The App Launcher can be added directly to profiles cloned from the following existing profiles.

- Force.com - App Subscription User
- Force.com - One App User
- Force.com - Partner App User
- Standard Platform Light User
- Standard Platform One App User
- Standard Platform User

1. From **Setup**, click **Manage Users > Profiles**.
2. Click **New**.
3. Select an Existing Profile as a basis for the new profile.

For example, select **Standard Platform User**.

4. Enter the name of the new profile.  
For example, `Standard Platform User Identity`.
5. Click **Save**.
6. In the detail page for the new profile, click **Edit**.
7. In Administrative Permissions, select **Use Identity Features**.
8. In Custom App Settings, set the App Launcher to **Visible**.  
In Tab Settings, the App Launcher tab should be set to `Default On`. If not, set the value to `Default On`.
9. Click **Save**.
10. From **Setup**, click **Manage Users > Users**.
11. Click **Edit** next to an existing user to whom you want to give access to the App Launcher.
12. For the user's profile, select the new profile that has **Use Identity Features** enabled.
13. Click **Save**.

When you log in as the selected user, the App Launcher appears in the drop-down app menu.



**Note:** You can also enable the App Launcher for users using permission sets. For more information, see [Configure and Use the App Launcher](#).

## 10 Identity Connect Licenses for New Developer Edition Organizations

Developer Edition organizations now get 10 Identity Connect permission set licenses for testing and development.

Identity Connect provides Active Directory integration with Salesforce via a service which runs on either Windows or Linux platforms. This integration includes syncing Active Directory users with either Salesforce or Identity Connect acting as the Identity Service Provider (IDP) for Single Sign On (SSO) Active Directory integration when logging into Salesforce.

Developer Edition organizations must be created in the Summer '14 release or later to get the 10 Identity Connect permission set licenses.

In your Developer Edition organization, from Setup, click **Security Controls > Identity Connect** to get started.

## Cross-Domain Exchanges Switch to POST Requests

For better security, organizations should send cross-domain session information using POST requests, instead of GET requests.

Administrators can modify session security settings to enable POST requests for cross-domain session exchanges, such as when a user is using a Visualforce page. In this context, POST requests are more secure than GET requests, because POST requests keep the session information in the body of the request.

From Setup, click **Security Controls** > **Session Settings**. Select `Use POST requests for cross-domain sessions` to enable this feature, otherwise your organization will use GET requests for cross-domain sessions.

## Specify an Authorization Endpoint as a Request Parameter

Send your user to a specific authorization endpoint.

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

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”
	AND
	“Manage Auth. Providers”

You can add a `provAuthorizeEndpointHost` parameter to a Salesforce authentication provider URL to direct users to an authorization endpoint for a provided domain, such as a custom domain created using My Domain. Providing an authorization endpoint lets you take advantage of features like session discovery during authorization. This parameter is only available for Salesforce authentication providers, and cannot be used to send users to an authorization page outside of a Salesforce domain.

To direct your users to a specific Salesforce authorization endpoint, you need to specify a URL with the `provAuthorizeEndpointHost` request parameter and a valid `https` host. Query strings appended to the host URL are ignored. However, you can specify a community path.

If an authorization endpoint is not provided, Salesforce uses the default authorization endpoint for the authorization provider. If no default is set for the authorization provider, Salesforce uses the endpoint for `login.salesforce.com`.

The authorization endpoint does not change the token endpoint, which continues to be the configured or default host. For example, if the authorization endpoint is a sandbox instance, and your provider is set to use a production token endpoint, the flow fails, because authorization was granted by the sandbox instance, only.

The following is an example of a `provAuthorizeEndpointHost` parameter added to the authentication provider URL:

- `orgID` is your Auth. Provider ID
- `URLsuffix` is the value you specified when you defined the authentication provider

```
https://login.salesforce.com/services/auth/sso/orgID/URLsuffix?provAuthorizeEndpointHost=https%3A%2F%2Fmydomain.my.salesforce.com
```

The following is an example of a `provAuthorizeEndpointHost` directed to a community URL

```
https://login.salesforce.com/services/auth/sso/orgID/  
URLsuffix?provAuthorizeEndpointHost=https%3A%2F%2Fmycommunity.force.com%2Fbilling
```

## Get Custom Permissions in the Identity URL Response

OAuth requests can use the `custom_permissions` scope to retrieve custom permissions associated with a connected app for an organization, and whether an individual user has each permission enabled.

Available in: **All Editions**

### User Permissions Needed

To manage, create, edit, and delete OAuth applications: "Manage Connected Apps"



**Note:** Custom permissions are currently available as a Developer Preview.

Salesforce supports a new OAuth scope to include a map of custom permissions information in the response from a user's identity URL. When a request includes the `custom_permissions` scope parameter, the response includes a map containing custom permissions in an organization associated with the connected app. If the connected app is not installed in the organization, or has no associated custom permissions, the response does not contain a `custom_permissions` map.

```
http://login.salesforce.com/services/oauth2/authorize?response_type=token&client_  
id=3MVG91KcPoNINVBKV6EgVJiF.snSDwh6_2wSS7BrOhHGEJkC_&redirect_uri=http://www.example.org/qa/security/oauth  
/useragent_flow_callback.jsp&scope=api%20id%20custom_permissions
```

When the new scope is included, the user's identity URL includes a block like the following.

```
"custom_permissions":  
{  
  "Email.View":true,  
  "Email.Create":false,  
  "Email.Delete":false  
}
```

Configure connected apps to include the new scope when you create or edit the app's OAuth settings by selecting **Access custom permissions (custom\_permissions)** from the available OAuth scopes.



**Note:** This selection in the UI is not available until July 2014.

The new scope is also included in the organization's metadata. For more information on the metadata addition, see [Metadata Types and Fields](#).

## Community ID and URL Values Included in OAuth Responses

Use OAuth to get a user's community ID and community URL values.

Salesforce includes the following return parameters for a successful Web server, user-agent, or refresh token OAuth flow request if the user is currently a member of a Salesforce community.

- `sfdc_community_id`
- `sfdc_community_url`

The following is a partial example of a response to an OAuth Web Server Authentication Flow request.

```
{
  "id": "https://login.salesforce.com/id/00Dx0000V7z/005x0009P",
  "issued_at": "1392854341715",
  "scope": "full",
  "instance_url": "https://UniversalTelco.my.salesforce.com",
  "sfdc_community_url": "https://UniversalTelco.force.com/customers",
  "token_type": "Bearer",
  "id_token": "eyJhbGciOiJI...",
  "sfdc_community_id": "000000"
}
```

## Organization ID Allowed as a Salesforce Identity Provider Custom Attribute

When using Salesforce as an identity provider, you can now pass the `organization_id` attribute in the SAML assertion.

Connected Apps can be created in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Connected Apps can be installed in: **All** Editions

User Permissions Needed	
To read:	“Customize Application”
To create, update, or delete:	“Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application”
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application” AND “Modify All Data”
To uninstall:	“Download AppExchange Packages”

Previously, the `organization_id` attribute was not allowed in SAML assertions generated by Salesforce when Salesforce is acting as an identity provider. Now, the `organization_id` is allowed, and can be added to a SAML assertion as a custom attribute. This is particularly useful if you are using Salesforce as the identity provider for portal users.

After you create a connected app for your service provider, use the following steps to add a custom attribute.

1. From Setup, click **Create > Apps**.
2. Click the **Connected App Name** for the service provider in the list to open the detail page.
3. In the Custom Attributes section, click **New**.

Each custom attribute must have a unique key and must use fields available from the **Insert Field** menu.

## Identity Provider Logout URL Supported for External Users of a Community

When logging out of a community, external users are redirected to the logout URL specified in the community's SAML settings, if the external user logged in using SAML for single sign-on.

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

If the `Identity Provider Logout URL` is set in the community's SAML settings, external users of the community who authenticated with SAML for single sign-on are redirected to the `Identity Provider Logout URL` after logging out. The SAML settings are in Setup, **Security Controls > Single Sign-On Settings**.

However, the `Identity Provider Logout URL` is used only when one SAML configuration in the organization has an `Identity Provider Login URL` specified. If the organization has multiple SAML configurations with their own `Identity Provider Login URL`, the external users logging out of the community are returned to the community login page.

## New Conditions for Access To Multiple Identity URLs With One Access Token

One access token can provide access to more than one identity URL, but only if several conditions are met.

A successful request for an access token returns an identity URL for the authorized user. Once issued, the same access token can be used to access other users' identity URLs in the same organization, if the following conditions are met.

- The OAuth request for the access token included the `full` or `api` scope.
- The access token is for a user with the "API Enabled" permission.
- The access token is for a user who has access to the other user according to the User Sharing rules of the organization.
- The access token is for an internal user, meaning the `user_type` value in the response is `STANDARD`.

## OpenID Connect Discovery Endpoint Added

Get information about Salesforce OpenID Connect support from a static URL.

The OpenID Connect discovery endpoint is a static page that can be used to query (no session required) for information about the Salesforce OpenID Connect configuration. Salesforce returns basic information about endpoints, supported scopes, and other values used for OpenID Connect authorization.

The format of the URL is: `https://login.salesforce.com/.well-known/openid-configuration`.



**Note:** For a sandbox, `login.salesforce.com` is replaced with `test.salesforce.com`.

The URL must always be HTTPS.

### OpenID Connect Discovery Endpoint Response

That URL request returns the information in JSON format, only.

The following is a response in JSON format:

```
{
  "issuer": "https://login.salesforce.com",
  "authorization_endpoint": "https://login.salesforce.com/services/oauth2/authorize",
  "token_endpoint": "https://login.salesforce.com/services/oauth2/token",
  "revocation_endpoint": "https://login.salesforce.com/services/oauth2/revoke",
  "userinfo_endpoint": "https://login.salesforce.com/services/oauth2/userinfo",
  "jwks_uri": "https://login.salesforce.com/id/keys",
  "scopes_supported": ["id", "api", "web", "full", "chatter_api",
    "visualforce", "refresh token", "openid", "profile", "email",
    "address", "phone", "offline_access", "custom_permissions"],
  "response_types_supported": ["code", "token", "token id_token"],
  "subject_types_supported": ["public"],
  "id_token_signing_alg_values_supported": ["RS256"],
  "display_values_supported": ["page", "popup", "touch"],
  "token_endpoint_auth_methods_supported": ["client_secret_post", "private_key_jwt"]
}
```

## Improved Internet Explorer Browser Compatibility for Login Features

Login hints and **Log in to a custom domain** are now available for older Internet Explorer browser versions.

Two features introduced in Spring '14, multiple username login hints and the link to “Log in to a custom domain” were not available in Internet Explorer versions older than version 10.

The multiple username login hints feature lets the Salesforce.com login page remember usernames from past logins, across multiple organizations or custom domains. This feature is now supported in Internet Explorer 8 and later, as well as other browsers.

The **Log in to a custom domain** link appears on the Salesforce.com login page to help users of organizations using the My Domain feature. This feature is available in Internet Explorer 6 and later, as well as other browsers.



**Note:** These changes will not be available until August 2014.

## Log in to a Custom Domain Field Suggestions for Communities

After users click on **Log in to a custom domain** on the Salesforce.com login page, and start typing, the page displays suggestions for completing a Communities URL.

The Salesforce login page includes a link, **Log in to a custom domain**, so users of organizations that implemented My Domain or Communities can easily get to their organization. As users type the subdomain name, the page provides a full URL suggestion below the field. For example, as the user types UniversalTelco, the page displays `https://UniversalTelco.my.salesforce.com`.

Now the suggestion can include URLs for Communities, such as `https://UniversalTelco.force.com` (no “my”) and supports appending names to the URL, such as `https://UniversalTelco.force.com/customers`.



**Note:** This change will not be available until August 2014.

## Microsoft Authentication Provider Support

You can use Microsoft Access Control Service as an authentication provider using OAuth. Authorization is typically done by a Microsoft Office 365 service like Sharepoint® Online.

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

User Permissions Needed	
To view the settings:	“View Setup and Configuration”
To edit the settings:	“Customize Application”
	AND
	“Manage Auth. Providers”

Salesforce supports authentication from a Microsoft Access Control Service using only OAuth. Single sign-on authentication from a Microsoft authentication provider is not supported.

1. **Define** a Microsoft Access Control Service authentication provider in your Salesforce organization.
2. Register your application with Microsoft, making Salesforce the application domain.
3. Edit your Microsoft Access Control Service authentication provider details in Salesforce to use the `Consumer Key` and `Consumer Secret` generated when you registered your application with Microsoft.
4. Test the connection using the `Test-Only Initialization URL` on the Auth. Provider detail page.

### Defining a Microsoft Access Control Service Authentication Provider in Your Salesforce Organization

Before you can register an application in SharePoint Online or the Microsoft Seller Dashboard, you need the callback URL that will be used to redirect the authorized user to Salesforce.

1. From Setup, click **Security Controls > Auth. Providers**.
2. Click **New**.
3. Select Microsoft Access Control Service for the `Provider Type`.
4. Enter a `Name` for the provider.
5. Enter the `URL Suffix`. This is used in the client configuration URLs. For example, if the URL suffix of your provider is “MyMicrosoftACSPProvider,” your callback URL is similar to:

```
https://login.salesforce.com/services/authcallback/00Dx0000000001/MyMicrosoftACSPProvider
```

6. Enter a placeholder value for the `Consumer Key` field (you’ll edit this value after your application is registered with Microsoft).
7. Enter a placeholder value for the `Consumer Secret` field (you’ll edit this value after your application is registered with Microsoft).
8. Enter the base URL from your provider for the `Authorize Endpoint URL`. For example, SharePoint Online uses the following form:

```
https://<sharepoint online host name>/_layouts/15/OAuthAuthorize.aspx
```

9. Enter the `Token Endpoint URL` in the following form.

```
https://accounts.accesscontrol.windows.net/<tenant>/tokens/OAuth/2?resource=<sender ID>/<sharepoint online host name>@<tenant>
```

- `<tenant>` is the Office 365 tenant name ending with `.onmicrosoft.com` or the corresponding tenant globally unique identifier (GUID).
- `<sender ID>` is the identifier for the sender of the token. For example, SharePoint uses `00000003-0000-0ff1-ce00-000000000000`

#### 10. Optionally, set the following fields.

- `Default Scopes` to send along with the request to the authorization endpoint. See <http://msdn.microsoft.com/en-us/library/jj687470.aspx#Scope> for more information about scopes for SharePoint Online. Or [Using the Scope Parameter](#) for more information about using scopes with Salesforce.
- `Custom Error URL` for the provider to use to report any errors.
- To use a portal with your provider, select the portal from the `Portal` drop-down list. If you have a portal set up for your organization, this option can redirect the login request to the portal login page. Otherwise, leave as `None`.

#### 11. Click **Save**.

Be sure to note the generated `Auth. Provider Id` value. You can use it with the [Auth.AuthToken Apex class](#).

Several client configuration URLs are generated after defining the authentication provider:

- `Test-Only Initialization URL`: Administrators use this URL to ensure the third-party provider is set up correctly. The administrator opens this URL in a browser, signs in to the third party, and is redirected back to Salesforce with a map of attributes.
- `OAuth-Only Initialization URL`: Use this URL to obtain OAuth access tokens for a third party. Users must authenticate with Salesforce for the third-party service to get a token; this flow does not provide for future single sign-on functionality.
- `Callback URL`: Use the callback URL for the endpoint that the authentication provider calls back to for configuration. The authentication provider has to redirect to the `Callback URL` with information for each of the above client configuration URLs.

The client configuration URLs support additional request parameters that enable you to direct users to log into specific sites, obtain customized permissions from the third party, or go to a specific location after authenticating.

## Sharing

Sharing improves your control over who sees what.

### ***User Sharing Auto-Enabled for All Organizations***

User Sharing controls who sees whom in the organization.

### ***Control Manual Sharing for User Records***

Enable or prevent users from sharing their own user records with other users across the organization.

### ***External Organization-Wide Defaults Auto-Enabled for All Organizations***

External Organization-Wide Defaults enable you to set a different default access level for external users.

### ***Asynchronous Parallel Recalculation of Sharing Rules (Generally Available)***

Speed up sharing recalculation when you're working with sharing rules.

## User Sharing Auto-Enabled for All Organizations

User Sharing controls who sees whom in the organization.

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

User Sharing controls the visibility of internal users and external users within your organization, communities, and portals. Previously, User Sharing was automatically enabled only for new organizations that were provisioned after Winter '14. With Summer '14, User Sharing is automatically enabled for all organizations.

Watch a demo:  [Who Sees Whom: User Sharing](#)

With User Sharing, you can:

- Set the organization-wide defaults for user records to Private or Public Read Only. The default is Public Read Only for internal users and Private for external users.
- Create user sharing rules that are based on group membership or other criteria.
- Create manual shares for user records to open access to individual users or groups.

For example, you're a manufacturer who needs to include all dealers in your organization while preventing them from seeing or interacting with each other. You can set the organization-wide defaults for the user object to Private. Then, open access among groups of dealers who need to see and interact with each other in the organization with sharing rules or manual sharing. Additionally, you can assign the "View All Users" permission to users who need to see everyone in the organization. Users with the "Manage Users" permission are automatically granted the "View All Users" permission.

For more information, see "User Sharing Overview" in the Salesforce Help.

## Control Manual Sharing for User Records

Enable or prevent users from sharing their own user records with other users across the organization.

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

### User Permissions Needed

To enable or disable manual user record sharing:	"Manage Sharing"
--	------------------

Previously, the **Sharing** button was available on all user detail pages for organizations with User Sharing. This button enables a user to grant others access to the user's own user record, a method that is known as *manual sharing*. Now you can enable or disable the **Sharing** button for all users via the Sharing Settings page by following these steps.

1. From Setup, click **Security Controls > Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Select the **Manual User Record Sharing** checkbox to display the **Sharing** button on user detail pages, which enables users to share their records with others. Or deselect the checkbox to hide the button, which prevents users from sharing their user records with others.
4. Click **Save**.

With Summer '14, organizations that are enabling User Sharing get the **Sharing** button hidden on all user detail pages by default.

When the organization-wide default for users is set to Public Read Only, users get read access to all other user records, can see those users in search and list views, and can interact with those users on Chatter and Communities.

For example, a partner user wants to collaborate with the sales representative in Communities. If you have disabled the `Community User Visibility` checkbox in the Sharing Settings page, community users can only be seen by themselves and their superiors in the role hierarchy. You can use manual sharing to grant the partner user read access to the sales representative by using the **Sharing** button on the sales representative's user detail page. This access enables both parties to interact and collaborate in Communities.

## External Organization-Wide Defaults Auto-Enabled for All Organizations

External Organization-Wide Defaults enable you to set a different default access level for external users.

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

Previously, if your organization wanted Public Read Only or Public Read/Write access for internal users but Private for external users, you would have to set the default access to Private and create a sharing rule to share records with all internal users.

With separate organization-wide defaults, you can achieve similar behavior by setting the default internal access to Public Read Only or Public Read/Write and the default external access to Private. These settings also speed up performance for reports, list views, searches, and API queries.

External organization-wide defaults simplify your sharing rules configuration and improve recalculation performance. Furthermore, they reduce overhead of sharing checks for search and reports, and improves sharing maintenance around realignments.

The following objects support external organization-wide defaults.

- Accounts and their associated contracts and assets
- Cases
- Contacts
- Opportunities
- Custom Objects
- Users

External users include:

- Authenticated website users
- Chatter external users
- Community users
- Customer Portal users
- Guest users
- High-volume portal users
- Partner Portal users
- Service Cloud Portal users



**Note:** Chatter external users have access to the User object only.

To start using the external organization-wide defaults, from Setup, click **Security Controls > Sharing Settings**. Click the **Enable External Sharing Model** button to enable the feature. Then, click **Edit** in the Organization-Wide Defaults area to edit the defaults.

For example, you want employees to have read and write access to accounts, but keep them private for external users in portals and communities.

Organization-Wide Defaults <span>Edit</span>		
Object	Default Internal Access	Default External Access
Lead	Public Read Only	Public Read Only
Account, Contract and Asset	Public Read/Write <span>1</span>	Private <span>2</span>
Contact	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private
Case	Public Read/Write	Private
Campaign	Public Full Access	Public Full Access
User	Private	Private

1. Set the default internal access to Public Read Only or Public Read/Write.
2. Set the default external access to Private to prevent external users from accessing those records.

The default external access level must be more restrictive or equal to the default internal access level.

## Asynchronous Parallel Recalculation of Sharing Rules (Generally Available)

Speed up sharing recalculation when you're working with sharing rules.

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

When you create, update, or delete sharing rules, the resulting recalculation is now processed asynchronously and in parallel. The recalculation is run in parallel and asynchronously in the background, which speeds up the process and provides better resilience to site operations such as patches and server restarts. You'll receive an email notification upon completion. Before the recalculation is completed, you can't run other sharing operations such as creating a sharing rule or updating the organization-wide defaults.

Parallel sharing rule recalculation is also run in these cases.

- Click the Recalculate button for the sharing rules on the Sharing Settings page
- Recalculate your sharing rules on the Defer sharing page

To view your recent sharing operations, from Setup, click **Security Controls > View Setup Audit Trail**. The View Setup Audit Trail page displays entries for when the recalculation is started and whether it's successful.

To monitor the progress of your parallel recalculations, from Setup, click **Monitoring > Background Jobs** or **Jobs > Background Jobs**. The Background Jobs page displays granular information on each sharing operation.

For example, when parallel recalculation is run when an account criteria-based sharing rule is updated, the Job Type column displays `Parallel Sharing Rule Recalculation` and the Job Sub Type column displays `Account – Criteria-based Sharing Rule`.

## Globalization

Globalization tools help administrators manage resources that vary from country to country, such as multilanguage, multicurrency, and translated content.

### *Language Additions and Changes*

Spanish (Mexico) is a fully supported language, and four platform-only languages have been added. Some language details have changed. You and your customers can access Salesforce and your custom applications in more languages than before.

### *Additional Globalization Changes*

Updates were made to the default names of several countries in state and country picklists.

## Language Additions and Changes

Spanish (Mexico) is a fully supported language, and four platform-only languages have been added. Some language details have changed. You and your customers can access Salesforce and your custom applications in more languages than before.

Spanish (Mexico) has been “promoted” from an End User language to a Fully Supported language. More user interface labels, text, and Help are translated, and Spanish (Mexico) is available as a choice during service sign-up.

Four new languages are available as Platform-Only languages.

- Bengali
- German (Austria)
- German (Switzerland)
- Tamil

Platform-Only languages don't provide translations for Salesforce labels or Help but allow you to provide translations for standard objects and fields, and for your customizations to Salesforce.

To reflect a European constitutional court decision, the Platform-Only language Moldovan has been renamed Romanian (Moldova). This change is label-only, and behavior is otherwise unaffected.

## Additional Globalization Changes

Updates were made to the default names of several countries in state and country picklists.

## Critical Updates

This release includes updates that improve the performance, logic, and usability of Salesforce but may affect your existing customizations.

User Permissions Needed	
To view critical updates:	“View Setup and Configuration”
To activate critical updates:	“Modify All Data”
	AND
	“Customize Application”

To ensure a smooth transition, each critical update has an opt-in period, which ends on the auto-activation date displayed on the Critical Updates page in Setup. During this period, you can manually activate and deactivate the update as much as you need to evaluate the impact on your organization and modify any affected customizations. Once the opt-in period has passed, the update is automatically activated. For more details, see “Critical Updates Overview” in the Salesforce Help.

### Governor Limits Enforced on All Flows

Previously, flows could potentially consume more resources than are allowed by our governor limits, such as the number of DML statements or SOQL queries issued in a single transaction. Create, update, and delete elements issue DML statements, and lookup elements issue SOQL queries. This critical update more strictly enforces governor limits on flows.

### Enhanced Session ID Management for Visualforce

Visualforce session management has been improved to more correctly handle transitions between different salesforce.com servers. The critical update is transparent in normal use but fixes problems with certain edge cases.

## Other Changes in Force.com Customization

Even small customization enhancements can make Salesforce easier to use.

### Link to Success Community Site in Force.com App Menu

The Force.com App Menu (the drop-down list that displays at the top of every Salesforce page) now includes a Success Community link. From the Salesforce Success Community site, you can engage with and get answers from a community of customers, partners, and Salesforce experts.

### Twitter Component Added by Default onto Page Layouts

In organizations that are created after Spring '14, the Twitter component is added by default to the Mobile Cards section of page layouts for objects that support it.

### Permission Sets and Enhanced Profile User Interface: Users Section Added to System Permissions

In permission sets and the enhanced profile user interface, the System Permissions page now includes a Users section. All user-related system permissions are listed in this section.

### Increased Maximum Length for Long Text and Rich Text Fields

The maximum length for Long Text and Rich Text custom fields has been increased, from 32,768 characters (32 KB) to 131,072 characters (128 KB). The default length remains 32,768 characters, and existing fields are unchanged. To increase the length of an existing field, edit the field in Setup.

**Increased Maximum Number of Relationship Fields**

The maximum number of Relationship Fields per object has been increased, from 25 fields to 40 fields.

**Increased Maximum Number of External ID Fields**

The maximum number of custom fields used as external IDs has been increased, from 3 fields per object to 7 fields per object.

**Increased Validation for Custom Web Tabs**

Salesforce now validates custom Web tab URLs upon saving. If the URL is invalid or contains JavaScript, the save fails.

**Support for Compound Address Fields in the `DISTANCE ()` Formula Function**

The `DISTANCE ()` formula function now supports compound address fields, introduced in Spring '14. Previously, only geolocation fields were supported in formula field `DISTANCE ()` calculations.

**Support for Compound Address Fields in Custom Geolocation Indexes**

Compound address fields can now use custom indexing on the geolocation element of the field. In organizations with hundreds of thousands of records, this change should in most cases significantly improve the performance of SOQL queries that include `WHERE DISTANCE ()` and `ORDER BY DISTANCE ()` clauses. To enable a custom index on a compound address field, contact [salesforce.com](mailto:salesforce.com).

# Force.com Development

Force.com helps you develop new applications and integrations to help your organization or for resale to other organizations.

## **Sandboxes**

Use sandboxes to develop, test, and simulate deployment of your customization.

## **Change Sets and Deployment Tools**

Administrators and developers now have new ways to use change sets and external tools for deployments.

## **Force.com Canvas**

Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

## **Developer Console**

Use new features of Developer Console to more easily manage code in your organization.

## **Visualforce**

Develop apps that combine Visualforce and JavaScript, including Salesforce1 and other mobile apps.

## **Apex Code**

Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code execution can be initiated by Web service requests and from triggers on objects.

## **API**

Use the API to create applications that integrate with Salesforce. We've made improvements in API version 31.0.

## **ISVforce**

Improvements include a new Partner Community for ISVs, a simplified package installer, packaging of mobile apps, usage metrics tracking and visualization, as well as enhancements to package licensing and the Environment Hub.

# Sandboxes

Use sandboxes to develop, test, and simulate deployment of your customization.

## **Packaged Connected Apps Copied to Sandboxes**

Sandbox copy and refresh now support connected apps installed using a package installation, such as connected apps installed from the AppExchange.

## **Match Production Licenses to Sandbox without a Refresh**

You can match provisioned licenses in production to your sandbox organization without having to refresh your sandbox.

## Packaged Connected Apps Copied to Sandboxes

Sandbox copy and refresh now support connected apps installed using a package installation, such as connected apps installed from the AppExchange.

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

User Permissions Needed	
To view a sandbox:	“View Setup and Configuration”
To create, refresh, activate, and delete sandbox:	“Modify All Data”

Packaged connected apps can be copied to a sandbox, automatically during the creation or refresh of a sandbox. However, Sandbox copy and refresh do not copy connected apps created within the production organization. For connected apps created within the production organization, delete any connected apps in the sandbox after the copy or refresh finishes. Then, re-create them in the sandbox to match the configuration in the production organization. The new connected app in the sandbox cannot use the same Connected App API Name value (this is the same value as the `fullName` field in the metadata API).

## Match Production Licenses to Sandbox without a Refresh

You can match provisioned licenses in production to your sandbox organization without having to refresh your sandbox.

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

User Permissions Needed	
To match licenses to sandbox:	“Modify All Data”

The matching process updates the license counts in your sandbox so that they match production, adds licenses to your sandbox that are in production but not in sandbox, and deletes licenses from sandbox that aren't in production.

To match licenses to a sandbox organization, log in to your sandbox organization, and then from Setup, click **Company Profile > Company Information > Match Production Licenses**. You'll get an alert informing you that the matching process has started. After all licenses have been matched in sandbox, a confirmation email is sent to you. The confirmation email is always sent to the user who initiates the license copy.

Matching production licenses requires that your sandbox and production are on the same Salesforce release. If your sandbox has already been upgraded to the next release—for example, during sandbox preview—but production hasn't been upgraded yet, you can't match production licenses in sandbox.

## Change Sets and Deployment Tools

Administrators and developers now have new ways to use change sets and external tools for deployments.

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

If you're using the Force.com Migration Tool or Force.com IDE, also see the changes in the [Metadata Types and Fields](#).

The components available for a change set vary by edition. The following components are now available for change sets.

### Entitlement Types

The following entitlement type sets are now included in change sets.

- Entitlement Process
- Entitlement Template
- Milestone

### Account Access on Territory

Account access permissions are now included in territories and deployed as part of territories in change sets. Previously, account access permissions weren't deployed as part of territories in change sets. As part of this change, a new field has been added to the Territory metadata type. See [Territory](#) in the "Metadata Types and Fields" release note.

### Change Sets Included in the Deployment Status Page

You can monitor the status of all deployments in one place.

### Force.com Migration Tool Support for `rollbackOnError`

The Force.com Migration Tool now accepts the `rollbackOnError` parameter in `build.xml` for deployment targets and no longer ignores this value.

## Change Sets Included in the Deployment Status Page

You can monitor the status of all deployments in one place.

In Spring '14, the user interface to monitor deployments (the Deployment Status page) was improved to include more information about deployments, including errors and test failures. The Deployment Status page included only deployments that are started from the Metadata API or tools such as the Force.com IDE or the Force.com Migration Tool. In this release, the Deployment Status page shows all deployments—change sets, Metadata API, and tools-based deployments.

The deployment type is added to the in-progress deployment section and the details page to differentiate between change sets and API-based deployments. For example, this image shows an in-progress change set deployment.

The screenshot shows a deployment status card with the following details:

- Deployment Succeeded**
- Name: set1
- Type: Change Set
- Deployed By: [Test User](#)
- Start Time: 4/18/2014 1:32 PM
- End Time: 4/18/2014 1:32 PM

Progress indicators on the right:

- 1 Deploy Components: 2/2 (indicated by a green circle)
- 2 Run Apex Tests: Not Required (indicated by a grey circle)

To access the Deployment Status page from Setup, click **Deployment Status** or **Deploy > Deployment Status**.

The deployment history of change sets is retained on the Deployment Status page for 30 days. After a deployment finishes, it is moved to the Failed or Succeeded section depending on whether the deployment failed or succeeded. You can check the deployment results, including errors and test failures, on the Deployment Detail page by clicking **View Details** next to a deployment.

Alternatively, deployment history is available on the Change Set Detail page. In the Deployment History section, click **View Details** next to a deployment to get more information.

## Force.com Migration Tool Support for rollbackOnError

The Force.com Migration Tool now accepts the `rollbackOnError` parameter in `build.xml` for deployment targets and no longer ignores this value.

Previously, the `rollbackOnError` parameter in `build.xml` always defaulted to `true` for deployment targets. With the new version of the Force.com Migration Tool, you can specify whether a complete rollback of a deployment is performed if a failure occurs by setting this parameter to `true` or `false`. This parameter must be set to `true` if you're deploying to a production organization. If the `rollbackOnError` parameter is not specified, the default is `true`.

## Force.com Canvas

Force.com Canvas enables you to easily integrate a third-party application in Salesforce. Force.com Canvas is a set of tools and JavaScript APIs that you can use to expose an application as a canvas app. This means you can take your new or existing applications and make them available to your users as part of their Salesforce experience.

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

The version of the Force.com Canvas SDK is 31.0.

For more information, see the Force.com Canvas Developer's Guide.

### ***entityFields Attribute Added to <apex:canvasApp>***

The `<apex:canvasApp>` component has a new attribute called `entityFields`. This attribute lets you specify object fields to be returned in the signed request Record object.

### ***SDK Object and Field Changes***

This release includes a number of changes to the context objects and fields in the Force.com Canvas SDK.

### ***Orientation Event for Handling Mobile Device Orientation***

The new `orientation` event enables you to handle changes in orientation when your canvas app appears on a mobile device.

### ***Canvas Apps in a Page Layout or a Mobile Card***

You can add a canvas app to a page layout for any standard or custom object. For the Canvas Apps category to appear in the palette when you edit a page layout, you must set the canvas app location to Layouts and Mobile Cards when you create the canvas app in the Salesforce application.

### ***Custom Icon Support in the Salesforce1 Navigation Menu***

You can now customize the navigation menu icon for your canvas app. To customize the icon, set the Icon URL entry in the Basic Information section of the connected app settings for your canvas app.

### ***Request a Signed Request On Demand***

You can now request signed request information in your canvas app on demand.

### Signed Request Canvas Apps Can Be User-Approved

Canvas apps that use signed request as their access method can now be user-approved. Previously, a canvas app could only be user-approved if you used OAuth authentication.

### SAML Single Sign-On for Canvas Apps

Whether you use signed request or OAuth authorization, you can use SAML-based single sign-on (SSO) to provide your users with a seamless authentication flow. You can leverage Salesforce as an identity provider or as a service provider. SAML SSO enables you to give your users automatic authentication into your canvas app via SAML and authentication into Salesforce via the signed request.

### Custom App Lifecycle

By providing a custom Apex class, you can control the context information that's sent to your canvas app and add custom behavior when your app is rendered.

## entityFields Attribute Added to <apex:canvasApp>

The <apex:canvasApp> component has a new attribute called `entityFields`. This attribute lets you specify object fields to be returned in the signed request Record object.

The `entityFields` attribute lets you specify fields returned in the signed request Record object when the component appears on a Visualforce page placed on an object. If this attribute isn't specified or is blank, then only the Id field is returned. Valid attribute values include:

- Comma-separated list of field names. For example, to return the Account Phone and Fax fields, the attribute would look like: `entityFields="Phone,Fax"`.
- Asterisk "\*" to return all fields from the associated object.

Attribute Name	Attribute Type	Description	Required?	Default Value
<code>entityFields</code>	String	The object fields to return.	No	

## Returning Fields in the Record Object

When you use the <apex:canvasApp> component to display a canvas app on a Visualforce page, and that page is associated with an object (placed on the page layout, for example), you can specify fields to be returned from the related object. To do this, use the `entityFields` attribute. You can use this attribute in one of the following ways.

### Return Specific Object Fields

You can return specific object fields in the Record object by setting the `entityFields` attribute to a comma-separated list of field names. If there's an invalid field name in the list, then that field name is ignored and the valid fields are returned in the Record object.

```
<apex:canvasApp applicationName="MyApp" entityFields="Phone,Fax,BillingCity"
containerId="canvasAppDiv"/>
```

returns a Record object that looks like this:

```
"record": {
  "attributes": {
```

```

    "type": "Account",
    "url": "/services/data/v31.0/subjects/Account/001xx000003DGWiAAO"
  },
  "Id": "001xx000003DGWiAAO",
  "Phone": "(555) 555-5555",
  "Fax": "(555) 555-5555",
  "BillingCity": "Seattle"
}

```

### Return All Object Fields

You can return all object fields in the Record object by setting the `entityFields` attribute to the wildcard `"*"`.

```
<apex:canvasApp applicationName="MyApp" entityFields="*" containerId="canvasAppDiv"/>
```

returns a Record object that looks like this:

```

"record": {
  "attributes": {
    "type": "Account",
    "url": "/services/data/v31.0/subjects/Account/001xx000003DGWiAAO"
  },
  "Id": "001xx000003DGWiAAO",
  "IsDeleted": false,
  "MasterRecordId": null,
  "Name": "Edge Communications",
  "Type": "Customer - Channel",
  "ParentId": null,
  "BillingStreet": "123 Main Street",
  "BillingCity": "Seattle",
  "BillingState": "WA",
  "BillingPostalCode": "98121",
  "BillingCountry": "USA",
  ...
}

```

### Return the Id Field

If the `<apex:canvasApp>` component doesn't have the `entityFields` attribute or if the attribute is blank, then only the Id field is returned in the Record object.

```
<apex:canvasApp applicationName="MyApp" containerId="canvasAppDiv"/>
```

returns a Record object that looks like this:

```

"record": {
  "attributes": {
    "type": "Account",
    "url": "/services/data/v31.0/subjects/Account/001xx000003DGWiAAO"
  },
  "Id": "001xx000003DGWiAAO"
}

```

## SDK Object and Field Changes

This release includes a number of changes to the context objects and fields in the Force.com Canvas SDK.

- The Client object contains a new field that's called `refreshToken`. The client uses this token to authenticate a session. This value is returned only if the canvas app has "Perform requests on your behalf at any time (`refresh_token`, `offline_access`)" as one of the selected OAuth scopes; otherwise `null` is returned.

```
"client":
{
  "instanceId": "06Px00000002JZ",
  "instanceUrl": "http://instance.salesforce.com:8080",
  "oathToken": "00Dx0000X00Or4J!ARQAQJ34YLUq54RMTrQbxVoWUgorjFi3...",
  "refreshToken": "00DD0000000K1NM!ARAAQGJVGOyMjh1jjqvShRpLuAq0ke...",
  "targetOrigin": "http://instance.salesforce.com:8080"
}
```

- The Environment object contains a new Record object. The Record object is a JSON-formatted object that contains information about the object on which the canvas app appears. This could be a standard object like `Account` or a custom object like `Warehouse__c`. If the canvas app doesn't appear on an object page or in the publisher or feed associated with an object, then the Record object is empty.

Field	Description
Id	The ID of the related object. For example, if the canvas app appears on an Account page, this field contains the <code>AccountId</code> .

```
"record":{
  "attributes":{
    "type":"Account",
    "url":"/services/data/v31.0/objects/Account/001xx000003DGWiAAO"
  },
  "Id":"001xx000003DGWiAAO",
  "Phone":"(555) 555-5555",
  "Fax":"(555) 555-5555",
  "BillingCity":"Seattle"
}
```

- The Environment object contains two new values for `displayLocation`.
  - ◇ `MobileNav`—The canvas app was called from the navigation menu in Salesforce1.
  - ◇ `PageLayout`—The canvas app was called from an element within a page layout. If the `displayLocation` is `PageLayout`, one of the `subLocation` values might be returned.
- The Environment object contains a new field that's called `subLocation`. This is the sublocation in the application where the canvas app was called from when the canvas app is loaded in a mobile device. The `subLocation` is related to the `displayLocation`. Valid values for this field when the `displayLocation` is `PageLayout` are:
  - ◇ `S1MobileCardFullview`—The canvas app was called from a mobile card.
  - ◇ `S1MobileCardPreview`—The canvas app was called from a mobile card preview. The user must click the preview to open the app.
  - ◇ `S1RecordHomePreview`—The canvas app was called from a record detail page preview. The user must click the preview to open the app.
  - ◇ `S1RecordHomeFullview`—The canvas app was called from a page layout.

```
"environment":
{
  "parameters": {},
  "dimensions":
  {
    "clientHeight": "50px",
    "clientWidth": "70px",
    "height": "900px",

```

```

    "width": "800px",
    "maxHeight": "2000px",
    "maxWidth": "1000px"
  },
  "record": {
    "attributes": {
      "type": "Account",
      "url": "/services/data/v31.0/subjects/Account/001xx000003DGWiAAO"
    },
    "Id": "001xx000003DGWiAAO",
    "Phone": "(555) 555-5555",
    "Fax": "(555) 555-5555",
    "BillingCity": "Seattle"
  },
  "displayLocation": "PageLayout",
  "locationUrl": "http://www.salesforce.com/some/path/index.html",
  "subLocation": "S1MobileCardFullview",
  "uiTheme": "Theme3",
  "version": {
    "api": "31.0",
    "season": "SUMMER"
  }
}

```

- The Record object contains a new Attributes object. The Attributes object is a JSON-formatted object that contains information about the object on which the canvas app appears.

Field	Description
type	<p>The object that the canvas app is associated with. This value could be a standard object like <code>Account</code> or a custom object like <code>Warehouse__c</code>.</p> <p>If the canvas app appears in the publisher, then the type is the name of the associated object. For example, <code>CollaborationGroup</code> or <code>Account</code>. If the canvas app appears in a user feed or the feed associated with an object, then the type is <code>FeedItem</code>.</p>
url	The URL of the associated object. The format of the URL is the same as the REST API resource for the given record.

```

"record": {
  "attributes": {
    "type": "Account",
    "url": "/services/data/v31.0/subjects/Account/001xx000003DGWiAAO"
  },
  "Id": "001xx000003DGWiAAO"
}

```

## Orientation Event for Handling Mobile Device Orientation

The new `orientation` event enables you to handle changes in orientation when your canvas app appears on a mobile device.

After your canvas app subscribes to the event, the event fires whenever the parent window fires a `window.orientation` event. The event returns a payload that contains these values.

Value	Description
clientHeight	The height of the app in pixels, specific to the device on which the canvas app renders
clientWidth	The width of the canvas app in pixels, specific to the device on which the canvas app renders
orientation	Contains one of these values. <ul style="list-style-type: none"> <li>• 0: landscape to portrait</li> <li>• 90: portrait to landscape</li> <li>• -90: portrait to landscape turned counterclockwise</li> </ul>

The following code example shows how to subscribe to the `orientation` event.

```
// Capture the orientation event of the parent window.
Sfdc.canvas.client.subscribe(sr.client,
  {name : 'canvas.orientation',
   onData : function (event) {
     console.log("Parent's orientation: " + event.orientation +
       "Canvas app height: " + event.clientHeight +
       "Canvas app width: " + event.clientWidth);
   } });
});
```

## Canvas Apps in a Page Layout or a Mobile Card

You can add a canvas app to a page layout for any standard or custom object. For the Canvas Apps category to appear in the palette when you edit a page layout, you must set the canvas app location to `Layouts and Mobile Cards` when you create the canvas app in the Salesforce application.

### Add a Canvas App to a Page Layout

Follow these steps to add a canvas app to the page layout for an Account.

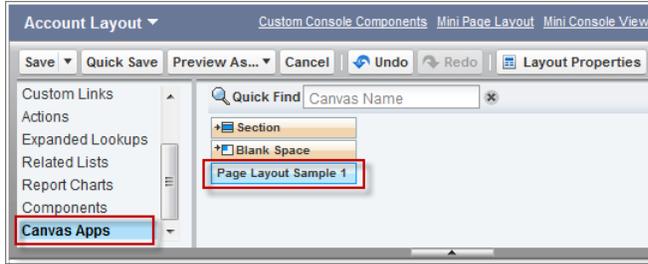
### Where Canvas Apps Appear in a Page Layout

Depending on where you place the canvas app on the page layout, the canvas app might appear in the full Salesforce site or in Salesforce1.

## Add a Canvas App to a Page Layout

Follow these steps to add a canvas app to the page layout for an Account.

1. Use the Heroku Quick Start to create a canvas app. To do this, follow the steps in [Create the App](#) in the Force.com Canvas Developer's Guide.
2. In the Salesforce application, from Setup, click **Create > Apps**.
3. In the Connected Apps related list, click **Edit** next to the app that you just created.
4. In the Canvas Apps Settings section, in the `Locations` field, select `Layouts and Mobile Cards`.
5. Click **Save**.
6. From Setup, click **Customize > Accounts > Page Layouts**.
7. Click **Edit** next to Account Layout.



You'll see the Canvas Apps category in the palette and the canvas app, because you set the location of the canvas app to Layouts and Mobile Cards.

8. Drag the canvas app element to where you'd like it to appear in the page layout, and then click **Save**.
  - If you add the canvas app to any section other than the Mobile Cards section, the canvas app appears in the page layout in the full Salesforce site or in the record detail page in Salesforce1.
  - If you add the canvas app to the Mobile Cards section, the canvas app appears only in the mobile card in Salesforce1.
9. To see your changes, click the **Accounts** tab, and then click an account. You'll see the canvas app on the page layout where you added it.

## Where Canvas Apps Appear in a Page Layout

Depending on where you place the canvas app on the page layout, the canvas app might appear in the full Salesforce site or in Salesforce1.

This table describes where the canvas app appears when you add it to the page layout.

If the canvas app is added to the page layout in ...	The canvas app appears in the full Salesforce site?	The canvas app appears in Salesforce1?	Where the canvas app appears in Salesforce1
Any section (other than the Mobile Cards section)	Yes	Yes	Record detail page
Mobile Cards section	No	Yes	Mobile card

## Custom Icon Support in the Salesforce1 Navigation Menu

You can now customize the navigation menu icon for your canvas app. To customize the icon, set the Icon URL entry in the Basic Information section of the connected app settings for your canvas app.

The icon URL must be a secure HTTPS URL that points to an icon image file. The image file must be in the GIF, JPG, or PNG file format. For the Salesforce1 navigation menu, the icon can't be larger than 60 pixels high by 60 pixels wide.

## Request a Signed Request On Demand

You can now request signed request information in your canvas app on demand.

If your canvas app is set to use signed request for authentication, you can request a signed request on demand by using the SDK. Your app can ask Salesforce to resend the signed request that was used when your app was loaded or to send a new

signed request. Requesting a signed request is useful when you are refreshing an expired session or getting authentication information after your app has been redirected.

You can request a signed request on demand by using the `refreshSignedRequest()` or `repost()` JavaScript methods in the SDK. `refreshSignedRequest()` returns a new signed request via a callback, while `repost()` asks the parent window to initiate a new POST to your canvas app and reloads the app page with a refreshed signed request.

## Signed Request Canvas Apps Can Be User-Approved

Canvas apps that use signed request as their access method can now be user-approved. Previously, a canvas app could only be user-approved if you used OAuth authentication.

This is the default authorization method for canvas apps. The signed request authorization flow varies depending on whether the canvas app's Permitted Users field is set to "Admin approved users are pre-authorized" or "All users may self-authorize." You'll need to modify the Web application that's exposed as a canvas app to handle a GET or POST call as shown in this table.

Permitted Users Value	Canvas App Accessibility	When the User Needs to Approve the Canvas App	POST or GET Behavior
Admin approved users are pre-authorized	The app is accessible to users as soon as the administrator installs it in the organization and configures which users can see it. Users don't need to approve or deny access.	Never	Salesforce performs a POST to the canvas app with all the authorization information contained in the body of the signed request, including the refresh token.
All users may self-authorize	The app is accessible to all users, but the user is prompted to approve or deny access to the app.	<ul style="list-style-type: none"> <li>The first time that the user opens the app</li> <li>If the access token is revoked by the administrator</li> <li>If the administrator sets a time limit on the token and that time limit is exceeded</li> </ul>	<p>If the user has previously approved the app and the access hasn't been revoked or expired, Salesforce performs a POST to the canvas app with a signed request payload.</p> <p>If the user hasn't approved the app, or if the access has been revoked or expired, Salesforce performs a GET to the canvas app URL. The canvas app must handle the GET by accepting the call and looking for the URL parameter <code>_sfdc_canvas_authvalue</code>. If the canvas app receives this parameter value, the canvas app should initiate the approve or deny OAuth flow.</p> <pre style="background-color: #f0f0f0; padding: 5px;">_sfdc_canvas_authvalue = user_approval_required</pre> <p>After the OAuth flow is initiated and the user approves the app, the canvas app should call the <code>repost()</code> method with a parameter of <code>true</code> to retrieve the signed request.</p>

## SAML Single Sign-On for Canvas Apps

Whether you use signed request or OAuth authorization, you can use SAML-based single sign-on (SSO) to provide your users with a seamless authentication flow. You can leverage Salesforce as an identity provider or as a service provider. SAML SSO enables you to give your users automatic authentication into your canvas app via SAML and authentication into Salesforce via the signed request.

SAML (Security Assertion Markup Language) is an XML-based standard for user authentication on the Web which allows the exchange of authorization data between two domains. With this feature you can create a canvas app that begins a standard SAML authentication flow when opened by a user. After this process completes, the user is authenticated into your Web application.

For canvas apps that use signed request authentication, two methods that are included in the Force.com Canvas SDK enable your canvas app to call into Salesforce to receive a new signed request directly or enable Salesforce to repost the signed request to your Web application endpoint. This results in a complete end-to-end authentication flow.

The elements that support this feature include the following features:

### SAML Initiation Method Field

This field lets you specify which provider initiates the SSO flow to access your canvas app.

- Identity Provider Initiated—Salesforce makes the initial request to start the SSO flow.
- Service Provider Initiated—The canvas app starts the SSO flow after the app is invoked.

For more information, see the topic “Creating a Connected App” in the Salesforce Help.

### refreshSignedRequest Method

Returns a new signed request via a callback. After the SAML SSO process is completed, your app can call this method and receive a new signed request. This method is intended for developers who need to retrieve the signed request by using a more client-side JavaScript approach. (The Force.com Canvas SDK sends the signed request to your app.)

### repost Method

Requests the parent window to initiate a POST to your canvas app and reloads the app page with a refreshed signed request. After the SAML SSO process is completed, your app can call this method and a new signed request is sent to your app via a POST. This method is for developers who need to retrieve the signed request using a more server-side approach. (Salesforce POSTs the signed request to your server.)

## Custom App Lifecycle

By providing a custom Apex class, you can control the context information that’s sent to your canvas app and add custom behavior when your app is rendered.

Salesforce provides several Apex interfaces and classes in the Canvas namespace that provide additional control over the canvas app lifecycle. You can use the Canvas namespace and the CanvasLifecycleHandler interface to:

- Control what sections of the CanvasRequest Context data get sent to your app. You can, for example, require that Salesforce never send the Organization information in the CanvasRequest data. Excluding sections of context data improve performance by reducing the amount of data that’s sent in the request and remove the need to process the organization data in your app.
- Retrieve application context data when the app is rendered and alter the behavior of your app accordingly. You can obtain the application version and, depending on the version, change how the app runs.
- Modify some of the context data, such as the canvas app URL, custom parameters, or the list of object fields that are returned in the Record data when the app is rendered.
- Present a well-formed error message to the user in the Salesforce UI if something goes wrong.

Salesforce also provides a Test class in the Canvas namespace that you can use to create test context data and verify the behavior of your lifecycle handler without having to run your app.

## Developer Console

Use new features of Developer Console to more easily manage code in your organization.

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

### ***Search and Edit Files with the Edit Menu***

The new **Edit** menu in the Developer Console allows you to quickly access search and edit functionality.

### ***Find Files By Name***

Search for files by name using the new Open Resource dialog in the Developer Console.

### ***Speed Up Queries with the Query Plan Tool***

The new Query Plan tool in the Developer Console can help speed up SOQL queries done over large volumes.

### ***View Color-Coded Logging Expiration Data***

The Change Log Levels dialog in the Developer Console now includes a color-coded `Expiration` field that displays the current logging status.

### ***Other Changes to the Developer Console***

We've made changes to Force.com Development to improve your experience.

## Search and Edit Files with the Edit Menu

The new **Edit** menu in the Developer Console allows you to quickly access search and edit functionality.

The following options are now in the **Edit** menu:

- **Find:** Searches the current view for the selected text. If no text is selected, opens a search dialog.
- **Find Next:** Finds the next match for the selected or specified text in the current view.
- **Find/Replace:** Finds and replaces the selected or specified text in the current view.
- **Search in Files:** Opens a search dialog to search the contents of all code files.
- **Fix Indentation:** Corrects the indentation in the current code file.

## Find Files By Name

Search for files by name using the new Open Resource dialog in the Developer Console.

In addition to the type-based Open dialog, the new Open Resource dialog allows you to search for a file by name by entering a simple string, or by using regular expressions (prefix with "re:"). Click **File > Open Resource** or press **SHIFT+CTRL+O**.

## Speed Up Queries with the Query Plan Tool

The new Query Plan tool in the Developer Console can help speed up SOQL queries done over large volumes.

Use the Query Plan tool to optimize and speed up queries done over large volumes. To enable the tool, click **Help > Preferences** and set `Enable Query Plan` to `true`. To use the tool, enter your query and click the **Query Plan** button in the Query Editor. The Query Plan window displays all query operations and the cost of each.

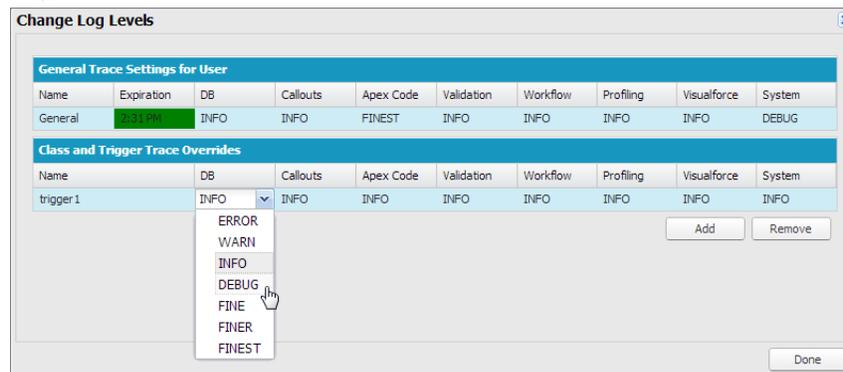


Cardinality	Fields	Leading Operation Type	Cost	sObject Cardinality	sObject Type
20		TableScan	2.83333...	20	Contact

## View Color-Coded Logging Expiration Data

The Change Log Levels dialog in the Developer Console now includes a color-coded `Expiration` field that displays the current logging status.

The `Expiration` field displays the time that logging will expire. The field remains green as long as there are 10 or more minutes of logging time remaining, turns yellow when there are less than 10 minutes remaining, and turns red after logging has expired and is no longer active.



General Trace Settings for User									
Name	Expiration	DB	Callouts	Apex Code	Validation	Workflow	Profiling	Visualforce	System
General	<span style="background-color: green; color: white;">10:00</span>	INFO	INFO	FINEST	INFO	INFO	INFO	INFO	DEBUG

Class and Trigger Trace Overrides									
Name	DB	Callouts	Apex Code	Validation	Workflow	Profiling	Visualforce	System	
trigger1	INFO	INFO	INFO	INFO	INFO	INFO	INFO	INFO	INFO

## Other Changes to the Developer Console

We've made changes to Force.com Development to improve your experience.

### Keyboard Shortcuts Function Consistently

The Find function of the CTRL+G and CTRL+SHIFT+G keyboard shortcuts has been disabled because these shortcuts previously produced different results in different areas of the Developer Console.

### Find Feature is Easier to Use

The Find feature now has improved highlighting, scrolling, and status display.

## Keyboard Shortcuts Function Consistently

The Find function of the CTRL+G and CTRL+SHIFT+G keyboard shortcuts has been disabled because these shortcuts previously produced different results in different areas of the Developer Console.

We now reserve CTRL+G for **Open Log** and CTRL+SHIFT+G for **Open Raw Log**.

## Find Feature is Easier to Use

The Find feature now has improved highlighting, scrolling, and status display.

When you navigate between search results by pressing Enter, scrolling is now automatic.

The Search field no longer loses focus when you navigate to the next result, which helps prevent you from accidentally deleting your code while searching through it.

Search results no longer include highlighting from previous searches.

And, you no longer need to wonder whether a search has completed. Searches that returned no results now display a message informing you that 0 matches were found.

## Visualforce

Develop apps that combine Visualforce and JavaScript, including Salesforce1 and other mobile apps.

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

For further information on features affected by these enhancements, refer to the *Visualforce Developer's Guide*.

### Visualforce Development

Visualforce language and feature improvements make app development easier. Enhancements in this release are focused on improving the experience of developing apps that combine Visualforce and JavaScript. These release notes explain the new features in detail, and also provide an extended code sample showing how the different features can be used.

### Other Changes in Visualforce

We've made some additional changes in Visualforce.

## Visualforce Development

Visualforce language and feature improvements make app development easier. Enhancements in this release are focused on improving the experience of developing apps that combine Visualforce and JavaScript. These release notes explain the new features in detail, and also provide an extended code sample showing how the different features can be used.

### Improvements to Remote Objects (Developer Preview)

Visualforce Remote Objects has been improved with new features, including remote method overrides, an `upsert()` operation, the `orderby` query condition for specifying sort order, and new query operators for `where` conditions. Also, Remote Objects now supports geolocation fields, which removes a limitation of the prior release.

### Overriding Default Remote Objects Operations

Override the default Remote Objects operations with your own Apex code to extend or customize the behavior of Remote Objects.

### **An Example of Using Remote Method Overrides in Remote Objects**

This sample code illustrates how to create remote method overrides for Remote Objects operations. The example presents a sorted list of contacts and a simple form to enter a new contact. The new contact action overrides the built-in Remote Objects `create()` operation. The sample also illustrates blending Remote Objects with several Web development libraries to present a mobile-friendly user interface.

### **API Versioning for `sforce.one` Functions**

The `sforce.one` JavaScript utility object is used for managing navigation on Visualforce pages that are used in Salesforce1 apps. This object is now versioned. Changes that alter its behavior won't break Visualforce pages, and you can write code that depends on version-specific functionality using the new `sforce.one.getVersion()` function.

### **Deferred Creation of Dynamic Components**

A dynamic component can now wait for page actions to be completed before the method that creates the dynamic component runs. You can now design dynamic components that change depending on the result of, for example, a page initialization action or a callout. This enhancement gives you additional options for creating dynamic, adaptable user interfaces in Visualforce.

## **Improvements to Remote Objects (Developer Preview)**

Visualforce Remote Objects has been improved with new features, including remote method overrides, an `upsert()` operation, the `orderby` query condition for specifying sort order, and new query operators for `where` conditions. Also, Remote Objects now supports geolocation fields, which removes a limitation of the prior release.

Remote Objects remains a Developer Preview in this release. See "Limitations of Remote Objects" in the *Visualforce Developer's Guide* for additional details about the Developer Preview.

### **Remote Method Overrides**

Remote method overrides enable you to extend or replace the built-in behavior of the basic create, retrieve, update, and delete (CRUD) operations. Overrides give you new flexibility in what you can build with Remote Objects by enabling you to add your own custom logic to the basic operations. See [Overriding Default Remote Objects Operations](#) on page 256 for complete details.

#### **`upsert()` Operation**

The `upsert()` operation is a convenience method that gives you a shortcut for saving new data by updating an object or creating an object if it doesn't exist.

#### **`orderby` Conditions**

`orderby` enables you to set a sort order for your results. You can sort on up to three fields.

Specify your `orderby` conditions as an array of JavaScript objects that contain name-value pairs. The field to sort on is the name, and the sort description is the value. The sort description enables you to sort ascending or descending and to sort null values first or last. For example:

```
orderby: [ {Phone: "DESC NULLS LAST"} , {FirstName: "ASC"} ]
```

#### **`where` Condition Operators**

The following new operators are available for `where` conditions.

- `ne`: not equals
- `lte`: less than or equals
- `gte`: greater than or equals

## Geolocation Support

Remote Objects now supports retrieving and accessing geolocation custom fields. You can use either the compound or individual components form of a geolocation field, by using slightly different code.

### Compound Geolocation Fields

The compound form of a geolocation field groups latitude and longitude values in a single field. Declare the field as usual for Remote Objects:

```
<apex:remoteObjectModel name="Warehouse__c" jsShorthand="Warehouse" fields="Id,Name">
  <apex:remoteObjectField name="Location__c" jsShorthand="Location"/>
</apex:remoteObjectModel>
```

The returned field is a JavaScript object with two attributes, `longitude` and `latitude`. With a `Warehouse` record as declared in the previous paragraph, access the individual longitude and latitude values by using dot notation:

```
var long = record.get("Location").longitude;
var lat  = record.get("Location").latitude;
```

### Geolocation Field Components

You can also treat the two values of a geolocation field as individual component fields. Declare each field separately, using the special individual component field naming convention of adding “`__Longitude__s`” and “`__Latitude__s`” to the geolocation field name:

```
<apex:remoteObjectModel name="Warehouse__c" jsShorthand="Warehouse" fields="Id,Name">
  <apex:remoteObjectField name="Location__Longitude__s" jsShorthand="longitude"/>
  <apex:remoteObjectField name="Location__Latitude__s" jsShorthand="latitude"/>
</apex:remoteObjectModel>
```

The returned fields are strings. With a `Warehouse` record as declared in the previous paragraph, access the individual longitude and latitude values directly:

```
var long = record.get("longitude");
var lat  = record.get("latitude");
```

### Errors When Accessing Inaccessible Fields

Remote Objects respects your organization’s field level security settings. Keep this in mind when you create pages that use Remote Objects. Fields that aren’t accessible to the person viewing the page appear blank. In the initial release of Remote Objects, actions that modify field data (`create()` and `update()`) would succeed, updating accessible fields but silently ignoring any inaccessible fields. This behavior could lead to inconsistent data. Beginning in this release, actions that modify data fail with an error if they include inaccessible fields in the request.

## Overriding Default Remote Objects Operations

Override the default Remote Objects operations with your own Apex code to extend or customize the behavior of Remote Objects.

Behind the scenes of Remote Objects, the basic operations—`create()`, `retrieve()`, `update()`, and `del()`—use a Remote Objects controller that’s the equivalent of the standard controller for normal Visualforce pages. You can override Remote Objects operations to extend or replace the built-in behavior of this controller. Overrides of Remote Objects operations are written in Apex and take effect by adding them to your page’s Remote Objects definitions.



**Note:** You can't override the `upsert()` operation. It's just a convenience function, and behind the scenes it delegates to either `create()` or `update()`. When you override either of those methods, the overridden method is automatically used by `upsert()` as appropriate.

### Remote Objects Access Definitions for Method Overrides

To override a Remote Objects operation with a remote method, set the attribute for the operation to the method that replaces the default method. For example, here's how to override the `create()` operation for contacts with a remote method.

```
<apex:remoteObjectModel name="Contact" fields="FirstName,LastName,Phone"
  create="{!$RemoteAction.RemoteObjectContactOverride.create}"/>
```

The attribute takes a Visualforce expression that references the `@RemoteAction` method to use as the override for the built-in `create()` operation. The expression takes the form of `$RemoteAction.OverrideClassName.overrideMethodName`, where the `$RemoteAction` global handles your organization namespace, as it does for JavaScript remoting. Note that the class that contains the `@RemoteAction` method needs to be set as the page's controller or as a controller extension for the page.

With this declaration, whenever your page's JavaScript code calls the `create()` function for a contact Remote Object, instead of using the Remote Objects controller, your remote method will be called.

### Remote Objects Override Methods

Remote Objects override methods are written as `@RemoteAction` methods in an Apex class, which you add to your page as a controller or controller extension.

The method signature for an override method is:

```
@RemoteAction
public static Map<String, Object> methodName(String type, Map<String, Object> fields)
```

The `type` parameter is the `sObject` type that's being acted upon, and the `fields` map is a collection that contains the values that were set on the Remote Object before the overridden method was called.

The return value is a map that represents the result of a Remote Objects operation. This map typically include the results of the call, the status, and any custom data that you want to provide as part of your custom method.

The simplest way to construct a valid return map is to use the `RemoteObjectController`. This is the standard controller that provides the built-in functionality for Remote Objects, and you can delegate data manipulation language (DML) operations to it by passing along your method's parameters. For example, here's a `create()` method that does nothing more than the built-in version of `create()` does:

```
@RemoteAction
public static Map<String, Object> create(String type, Map<String, Object> fields) {
    Map<String, Object> result = RemoteObjectController.create(type, fields);
    return result;
}
```

This method is effectively a no-op; that is, this method does exactly the same thing the built-in version would have done, nothing more and nothing less. Your override methods can execute whatever additional Apex you need to, including logging, additional DML, other method calls, and so on. For a more complete example of a Remote Objects override method, and the page that uses it, see [An Example of Using Remote Method Overrides in Remote Objects](#) on page 258.



**Important:** The `RemoteObjectController` standard controller automatically handles sharing rules, ownership, and other security concerns for Remote Objects. In contrast, methods in a custom controller or controller extension operate in system mode by default, which allows full access to all data in the organization. This behavior is the same

as for standard Visualforce pages that use custom controllers or controller extensions. When you write the controller code, you need to handle access rights and other concerns yourself.

As a best practice, use the `with sharing` keyword for your controller or controller extension class, and delegate as much as you can to the `RemoteObjectController`.

## An Example of Using Remote Method Overrides in Remote Objects

This sample code illustrates how to create remote method overrides for Remote Objects operations. The example presents a sorted list of contacts and a simple form to enter a new contact. The new contact action overrides the built-in Remote Objects `create()` operation. The sample also illustrates blending Remote Objects with several Web development libraries to present a mobile-friendly user interface.

This example uses the jQuery, Bootstrap, and Mustache tool kits, loading them from an external content distribution network (CDN).

Contact Data Order {{{LastName:'ASC'}}} <span>Refresh</span>		
FirstName	LastName	Phone
Mitchel	Abernathy	415-555-1212
Michael	Alderete	(415) 609-5555
Jon	Amos	(905) 555-1212
Marc	Benioff	(415) 901-7000
Patricia	Castellane	(777) 888-9999
Howard	Jones	(212) 555-5555
Geoff	Minor	(415) 555-1212
Marc	Rémillard	
Edward	Stamos	(212) 555-5555
Leanne	Tomlin	(212) 555-5555
Carole	White	(415) 555-1212

<input type="text" value="John"/>	<input type="text" value="Doe"/>	<input type="text" value="(123) 456-7890"/>	<input type="button" value="Save"/>
-----------------------------------	----------------------------------	---	-------------------------------------

Log

Fetchd contact records.

Records Size: 11!

Here's the Visualforce page, with the remote override declaration in bold.

```
<apex:page showHeader="false" standardStylesheets="false" docType="html-5.0"
  title="Contacts-RemoteObjects Style" controller="RemoteObjectContactOverride">

  <!-- Include in some mobile web libraries -->
  <apex:stylesheet
value="//netdna.bootstrapcdn.com/bootswatch/3.1.1/superhero/bootstrap.min.css"/>
  <apex:includeScript value="//ajax.googleapis.com/ajax/libs/jquery/1.11.0/jquery.min.js"/>

  <apex:includeScript
value="//cdnjs.cloudflare.com/ajax/libs/mustache.js/0.7.2/mustache.min.js"/>

  <!-- Set up Remote Objects, with an override for create() method -->
  <apex:remoteObjects jsNamespace="$M">
    <apex:remoteObjectModel name="Contact" fields="FirstName,LastName,Phone"
      create="{!$RemoteAction.RemoteObjectContactOverride.create}" />
  </apex:remoteObjects>
```

```

<!-- Page markup -->
<div class="container">
  <div class="row">
    <div class="col-md-2"></div>
    <div class="col-md-8">
      <table id="myTable"
        class="table table-bordered table-striped table-condensed">
        <colgroup>
          <col class="col-md-3" />
          <col class="col-md-3" />
          <col class="col-md-3" />
        </colgroup>
        <caption>
          Contact Data Order ( [ {LastName: 'ASC'}, {FirstName: 'DESC'} ] )
          <button id="bRefresh" class="btn btn-success btn-sm"
            type="button">Refresh</button>
        </caption>
        <caption id="msgBox" class="alert alert-danger hidden"></caption>
        <thead>
          <tr><td>FirstName</td><td>LastName</td><td>Phone</td></tr>
        </thead>
        <tbody></tbody>
        <tfoot>
          <tr>
            <td><input type="text" name="FirstName" id="iFirstName"
              placeholder="John" class="form-control" /></td>
            <td><input type="text" name="LastName" id="iLastName"
              placeholder="Doe" class="form-control" /></td>
            <td>
              <div class="input-group">
                <input type="text" name="Phone" id="iPhone"
                  placeholder="(123) 456-7890" class="form-control" />
                <span class="input-group-btn">
                  <button id="bAdd" class="btn btn-primary"
                    type="button">Save</button>
                </span>
              </div>
            </td>
          </tr>
        </tfoot>
      </table>
      <div class="panel panel-default">
        <div class="panel-heading">Log</div>
        <div class="panel-body" id="log">
        </div>
      </div>
    </div class="col-md-2"></div>
  </div>

<!-- Results template (table rows of Contacts) -->
<script id="tmpl" type="x-tmpl-mustache">
  <tr><td>{{FirstName}}</td><td>{{LastName}}</td><td>{{Phone}}</td></tr>
</script>

<!-- Page functionality -->
<script>
  var table = $('#myTable tbody');
  var template = $('#tmpl').html();
  Mustache.parse(template);

  // Retrieve all contacts and add to results table on page
  var fetchContacts = function() {
    (new $M.Contact()).retrieve({
      orderby: [ {LastName: 'ASC'}, {FirstName: 'DESC'} ],
    }, function(err, records) {
      if (!err) {
        // Add some status messages to the log panel

```

```

        $('#log')
        .append('<p>Fetched contact records.</p>')
        .append('<p>Records Size: ' + records.length + '!'</p>');

        // Update the table of contacts with fresh results
        table.empty();
        records.forEach(function(rec) {
            table.append(Mustache.render(template, rec._props));
        });
    } else {
        $('#msgBox').text(err.message).removeClass('hidden');
    }
});
};

var addContact = function() {
    // Create a new Remote Object from form values
    (new $M.Contact({
        FirstName: $('#iFirstName').val(),
        LastName: $('#iLastName').val(),
        Phone: $('#iPhone').val()
    })).create(function(err, record, event) {
        // New record created...
        if (!err) {
            // Reset the New Record form fields, for the next create
            $('input').each(function() {
                $(this).val('');
            });

            // Add some status messages to the log panel
            $('#log')
            .append('<p>Contact created!</p>')
            // Custom data added to event.result by override function
            .append('<p>Got custom data: ' + event.result.custom + '</p>');

            // Redraw the results list with current contacts
            fetchContacts();
        } else {
            $('#msgBox').text(err.message).removeClass('hidden');
        }
    });
};

// Bind application functions to UI events
$('#bRefresh').click(fetchContacts);
$('#bAdd').click(addContact);

// Initial load of the contacts list
fetchContacts();
</script>
</apex:page>

```

The key line of code in the preceding sample is in the Remote Objects access definition. Adding a single attribute to the contact Remote Object definition sets up the override:

```
create="{!$RemoteAction.RemoteObjectContactOverride.create}"
```

The attribute takes a Visualforce expression that references the @RemoteAction method to use as the override for the built-in create () operation.

In this case, the referenced method is in an Apex class that's the page's controller. The code for the override method is straightforward.

```
public class with sharing RemoteObjectContactOverride {

    @RemoteAction
    public static Map<String, Object> create(String type, Map<String, Object> fields) {
        System.debug(LoggingLevel.INFO, 'Before calling create on: ' + type);

        // Invoke the standard create action
        // For when you want mostly-normal behavior, with a little something different
        Map<String, Object> result = RemoteObjectController.create(type, fields);

        System.debug(LoggingLevel.INFO, 'After calling create on: ' + type);
        System.debug(LoggingLevel.INFO, 'Result: ' + result);

        // Here's the little something different, adding extra data to the result
        Map<String, Object> customResult =
            new Map<String, Object> {'custom' => 'my custom data' };
        customResult.putAll(result);

        return customResult;
    }
}
```

This method logs the `@RemoteAction` call and then uses the standard `RemoteObjectController.create()` call to perform the create. It's performing the same data manipulation language (DML) commands to create the record that the built-in version would, because it's using the built-in version. After performing the create, the method does a little more logging. Finally it adds some extra data to the return payload that will be received by the JavaScript callback function on the Visualforce page.

It's adding the extra data that's interesting and makes overriding the built-in method useful. The extra data that's added by the preceding controller is trivial, for the purposes of illustration only. A real-world override can include more complex logic—the result of a calculation, other method calls, and so on. What's important to understand is that the new custom override method can do additional things behind the scenes, and can return extra data that the built-in version can't.

## API Versioning for `sforce.one` Functions

The `sforce.one` JavaScript utility object is used for managing navigation on Visualforce pages that are used in Salesforce1 apps. This object is now versioned. Changes that alter its behavior won't break Visualforce pages, and you can write code that depends on version-specific functionality using the new `sforce.one.getVersion()` function.

### How `sforce.one` Handles API Versions

The `sforce.one` object is frequently improved in new releases of the Salesforce1 Platform. To maintain backward compatibility, `sforce.one` provides version-specific behavior, and you can use a specific version of `sforce.one` in your apps.

By default, `sforce.one` uses the same version as the API version of the requested Visualforce page. For example, if a Visualforce page has an API version of 30.0, JavaScript on that page that uses `sforce.one` by default uses the API version 30.0 of `sforce.one`.

This means that when a Visualforce page is updated to a new API version, the page automatically uses the updated version of `sforce.one`. In the preceding example, if that Visualforce page is updated to API version 31.0, app functionality that uses `sforce.one` uses the API version 31.0 of `sforce.one`.

If updated behavior in a new API version of `sforce.one` causes compatibility problems with the page's features, you have three options for correcting the problem.

- Revert the Visualforce page's API version to the prior version. This action requires no code changes.

- Update the code for the page's features to fix the problem. This solution is best, but it might require some debugging, and it will definitely require code changes.
- Use a specific version of `sforce.one`. This solution often requires minimal code changes.



**Note:** `sforce.one` was added in Winter '14 (API version 29.0) and wasn't versioned until Summer '14 (API version 31.0). All versions of `sforce.one` earlier than version 31.0 are identical to version 31.0. You can specify a version of `sforce.one` for any version that's valid for Visualforce, that is, from version 15.0 to the current API version.

### Using a Specific Version of `sforce.one`

To use a specific version of `sforce.one`, use the `sforce.one.getVersion()` function and provide it with the API version and a callback function that needs to use a specific version of `sforce.one`. The appropriate versions of `sforce.one` are automatically loaded by this call.

The signature for `sforce.one.getVersion()` is:

```
sforce.one.getVersion(versionString, callbackFunction);
```

`versionString` is the API version that your application requires. It's always two digits, a period, and one digit, such as "30.0". Calls with invalid version strings fail silently.

`callbackFunction` is a JavaScript function that uses a specific version of `sforce.one`. `sforce.one.getVersion()` operates asynchronously, and your callback function is called when it finishes loading the requested version of `sforce.one`. Your callback function receives a single parameter, an `sforce.one` object for the specified API version. Use the object passed in instead of the global `sforce.one` to make calls to `sforce.one` that conform to the API version that your app requires.

### Examples of Using a Specific Version of `sforce.one`

The next examples all add a Create Account function to the following input button:

```
<input type="button" value="Create Account" onclick="btnCreateAccount()" id="btnCreateAcct"/>
```

### Defaulting to the Visualforce Page's API Version

App code that should use the default version of `sforce.one`—the version that corresponds to the Visualforce Page's API version—doesn't need to ask for a version. Using that version happens automatically, and the code is straightforward.

```
<script>
  function MyApp() {
    this.createAccount = function() {
      sforce.one.navigateToURL("/001/e");
    };
  }

  var app = new MyApp();

  function btnCreateAccount() {
    app.createAccount();
  }
</script>
```

App functionality is created in a `MyApp` object, and then an event handling function calls the app function when that event, a button click, occurs. Separating application functionality from application event handling is a best practice, and it sets you up for using version-specific versions of `sforce.one`.

### Using a Specific `sforce.one` API Version (Simple)

To use a specific version of `sforce.one`, get and save a reference to a versioned instance of the object. Then use this object to make `sforce.one` calls. The simplest way is to save it in the `MyApp` object. In the next sample, references to the versioned instance of `sforce.one` are in bold.

```
<script>
function MyApp(sfone) {
    this.createAccount = function() {
        sfone.navigateToURL("/001/e");
    };
}

var app30 = null;

function btnCreateAccount() {
    // Create our app object if not already defined
    if(!app30) {
        // Create app object with versioned sforce.one
        sforce.one.getVersion("30.0", function(sfoneV30) {
            app30 = new MyApp(sfoneV30);
            app30.createAccount();
        });
        return;
    }
    app30.createAccount();
}
</script>
```

In the preceding example, the event-handling function is expanded from the first example to include the creation of a version-specific instance of `sforce.one`. If your app needs to mix multiple versions, you can create multiple `MyApp` instances with appropriate versions and names. More than one or two, though, are cumbersome to manage. We recommend the next approach instead.

### Using a Specific `sforce.one` API Version (Best)

A better way to organize your app code is to create version-specific instances of `sforce.one` in an app initialization block of code so you can keep the event handling separate.

```
<script>
function MyApp(sfone) {
    this.createAccount = function() {
        sfone.navigateToURL("/001/e");
    };
}

var app30 = null;

// Initialize app: get versioned API, wire up clicks
sforce.one.getVersion("30.0", function(sfoneV30) {
    // Create app object with versioned sforce.one
    app30 = new MyApp(sfoneV30);

    // Wire up button event
    var btn = document.getElementById("btnCreateAcct");
    btn.onclick = btnCreateAccount;
});

// Events handling functions
// Can't be fired until app is defined
function btnCreateAccount() {
    app30.createAccount();
}
</script>
```

In this sample the app initialization is separated only by white space and comments, but you can separate it into functions for better encapsulation.

### Using a Specific `sforce.one` API Version (Synchronous)

You can trigger a synchronous mode for `sforce.one` by manually including the specific version of `sforce.one`'s JavaScript on your page. The format for the URL to the library is: `/sforce/one/sforceOneVersion/api.js`. Here's an example:

```
<script src="/sforce/one/30.0/api.js"></script>
<script>
  function MyApp(sfone) {
    this.createAccount = function() {
      sfone.navigateToURL("/001/e");
    };
  }

  var app = null;

  sforce.one.getVersion("30.0", function(sfoneV30) {
    app = new MyApp(sfoneV30);
  });

  // Events handling function
  // Can't be fired until app is defined
  function btnCreateAccount() {
    app.createAccount();
  }
</script>
```

Although some situations require synchronous mode, the asynchronous version is preferred. If you forget to manually include the correct versions of the `sforce.one` library, your code will contain bugs that are difficult to diagnose.

## Deferred Creation of Dynamic Components

A dynamic component can now wait for page actions to be completed before the method that creates the dynamic component runs. You can now design dynamic components that change depending on the result of, for example, a page initialization action or a callout. This enhancement gives you additional options for creating dynamic, adaptable user interfaces in Visualforce.

Dynamic Visualforce components enable you to create user interfaces that adapt to a variety of conditions, adapting to differences in user settings or permissions, organization settings, custom settings, and so on. Dynamic components achieve this flexibility by being defined in Apex rather than in markup. Prior to this release, the Apex method that defines a dynamic component was always executed at page load time, before any action method that's defined for the page was run. This meant that the component couldn't depend on a page's initialization or setup, callouts, or other long-running actions.

You can set the new `invokeAfterAction` attribute of a dynamic component to `true`, and the component is created after any action that's defined for the `<apex:page>`.

Here's a simple page that has a single dynamic component, which is created after the page's action method, `pageActionUpdateMessage`, is completed.

```
<apex:page controller="DeferredDynamicComponentController"
  action="{!pageActionUpdateMessage}" showHeader="false">
  <apex:dynamicComponent componentValue="{!dynamicComp}" invokeAfterAction="true"/>
</apex:page>
```

Here's the associated controller that provides the dynamic component definition, and illustrates the effect of the `invokeAfterAction` attribute.

```
public class DeferredDynamicComponentController {
    private String msgText { get; set; }

    public DeferredDynamicComponentController() {
        this.msgText = 'The controller is constructed.';
    }

    public Component.Apex.OutputPanel getDynamicComp() {
        // This is the component to return
        Component.Apex.OutputPanel dynOutPanel= new Component.Apex.OutputPanel();
        dynOutPanel.layout = 'block';

        // Child component to hold the message text
        Component.Apex.OutputText msgOutput = new Component.Apex.OutputText();
        msgOutput.value = this.msgText;
        dynOutPanel.childComponents.add(msgOutput);

        return dynOutPanel;
    }

    public Object pageActionUpdateMessage() {
        this.msgText= 'The page action method has been run.';
        return null;
    }
}
```

With the previous behavior for dynamic components, the `msgText` value that's set in the constructor is displayed by the dynamic component. Setting `invokeAfterAction="true"` on the dynamic component changes that behavior. The page waits for the `pageActionUpdateMethod` to be completed and *then* creates the dynamic component, and so the component displays the value for `msgText` that's set in the `pageActionUpdateMessage` action method instead.

**This change is versioned, and you must update your pages to API version 31.0 or later to use the `invokeAfterAction` attribute.**

### Deferred Creation of Dynamic Components and Other Actions

`invokeAfterAction="true"` affects dynamic components immediately at page load time, because that's when page actions run. Setting `invokeAfterAction="true"` reverses the order of component creation and *any* action method on the page. That is, the order of execution is changed for action methods on all the following components.

- `<apex:actionFunction>`
- `<apex:actionPoller>`
- `<apex:actionSupport>`
- `<apex:commandButton>`
- `<apex:commandLink>`
- `<apex:page>`
- `<apex:togglePanel>`

When `invokeAfterAction="false"` is set on a dynamic component, the order of execution is as follows. This is the default behavior for dynamic components.

1. Invoke the dynamic component's creation method, which constructs the component.
2. Invoke the action method.
3. Rerender the page.

When `invokeAfterAction="true"` is set on a dynamic component, the order of execution is as follows.

1. Invoke the action method.
2. Invoke the dynamic component's creation method, which constructs the component.
3. Rerender the page.



**Note:** In the second case, if the action method returns a PageReference, Visualforce will redirect the request to the new page, and the dynamic component's creation method won't be run. To avoid a possible order-of-execution bug, it's a best practice that methods that create dynamic components don't have side effects.

## Other Changes in Visualforce

We've made some additional changes in Visualforce.

### *renderStyle Attribute Added to topics:widget*

The topics widget lets users see, add, and remove topics on a record so it's easy to tag and categorize records. Use the `renderStyle` attribute to specify whether the widget appears with a basic or an advanced user interface.

### *<apex:lineSeries> markerFill and fillColor Attributes Default to strokeColor*

The `markerFill` and `fillColor` attributes of the `<apex:lineSeries>` charting component weren't defaulting to match the component's `strokeColor` as documented. This behavior has been corrected for pages that are set to API versions 31.0 and later.

### *Consolidated Inclusion of Salesforce CSS and JavaScript Resources*

The way that Visualforce adds Salesforce CSS and JavaScript resources to generated pages has been optimized. The result is pages that are faster to download and more efficient to render in the browser than in prior releases.

### *Enhanced Session ID Management for Visualforce*

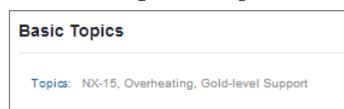
Visualforce session management has been improved to more correctly handle transitions between different salesforce.com servers. The critical update is transparent in normal use but fixes problems with certain edge cases.

## renderStyle Attribute Added to topics:widget

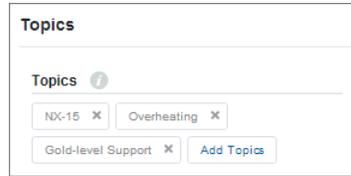
The topics widget lets users see, add, and remove topics on a record so it's easy to tag and categorize records. Use the `renderStyle` attribute to specify whether the widget appears with a basic or an advanced user interface.

Attribute Name	Attribute Type	Description	Required?	Default Value
<code>renderStyle</code>	String	The style in which the topics widget is rendered. Acceptable values are <code>simple</code> and <code>enhanced</code> .	No	<code>simple</code>

Here's what the topics widget looks like when `renderStyle=simple`:



Here's what it looks like when `renderStyle=enhanced`:



The `renderStyle` attribute is available in API version 31.0 and later.

## <apex:lineSeries> markerFill and fillColor Attributes Default to strokeColor

The `markerFill` and `fillColor` attributes of the `<apex:lineSeries>` charting component weren't defaulting to match the component's `strokeColor` as documented. This behavior has been corrected for pages that are set to API versions 31.0 and later.

Visualforce `<apex:lineSeries>` charts are designed so that, by default, the lines, markers, and fill color all match. This worked as documented if the line colors were chosen automatically by Visualforce, but if you set any of the line colors manually by using the `strokeColor` attribute, the corresponding `markerFill` and `fillColor` didn't change to match. The work-around was to manually specify the `markerFill` and `fillColor`, which adds extra markup. (The alternative—a hideous, mixed-color line series—is too horrible to contemplate.)

This behavior has been fixed, and `markerFill` and `fillColor` default to the `strokeColor` if specified. You can still manually specify mixed colors by setting `markerFill` or `fillColor` explicitly. **This change is versioned, and you must update your pages or components to API 31.0 or later to access the improved behavior.**

## Consolidated Inclusion of Salesforce CSS and JavaScript Resources

The way that Visualforce adds Salesforce CSS and JavaScript resources to generated pages has been optimized. The result is pages that are faster to download and more efficient to render in the browser than in prior releases.

This optimization affects the Salesforce resources that are used to provide Salesforce styling and application functionality. This change doesn't apply to the CSS and JavaScript that you add to your Visualforce pages by using `<apex:stylesheet>`, `<apex:includeScript>`, or static HTML. `<apex:stylesheet>` and `<apex:includeScript>` automatically consolidate duplicate inclusions of resources.



**Note:** Salesforce doesn't support direct use of or dependency on the resources that are optimized by this change. So, in theory, there should be no visible effect on your pages. In practice, sometimes customers make unsupported use of these resources. If your pages depend on specific Salesforce stylesheets or JavaScript files, we recommend that you test them thoroughly in a sandbox or Developer Edition organization and fix any problems that you discover.

## Enhanced Session ID Management for Visualforce

Visualforce session management has been improved to more correctly handle transitions between different salesforce.com servers. The critical update is transparent in normal use but fixes problems with certain edge cases.

The update changes how and when session IDs are generated and managed. Salesforce.com servers handle the change automatically, but if you have a custom integration that relies on session ID values, we recommend that you verify this update for compatibility in a sandbox or Developer Edition organization before enabling it permanently in your production organization.

If you activate this update now, the enhanced session ID management will be used for all Visualforce pages in your organization. Otherwise, this update will be enabled for your organization on the activation date.

# Apex Code

Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code execution can be initiated by Web service requests and from triggers on objects.

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

Apex includes the following enhancements. For detailed information on these enhancements, refer to the [Force.com Apex Code Developer's Guide](#).

## **Describe Limits Removed**

Limits for all Apex describe calls have been removed for all API versions. Describe calls include describes for sObjects, fields, field sets, child relationships, picklists, and record types.

## **Script Statement Limits Methods Removed**

The Limits methods for script statements have been removed but are available and deprecated in API version 30.0 and earlier. Because the script statement limit is no longer enforced in any API version since Winter '14, the associated Limits methods are no longer needed.

## **Create Price Book Entries in Apex Tests**

You can create price book entries for standard and custom price books in Apex tests.

## **Submit More Batch Jobs with Apex Flex Queue (Pilot)**

You can submit more batch jobs simultaneously and actively manage the order of the queued jobs.

## **Run Future Methods with Higher Limits (Pilot)**

Avoid reaching governor limits in your asynchronous future method by running your method with double or triple capacity for a resource.

## **New and Changed Apex Classes**

These methods, classes, and interfaces are new or have changed in this release.

## **Chatter in Apex (ConnectApi)**

To create custom Chatter experiences in Salesforce, use Chatter in Apex.

# Describe Limits Removed

Limits for all Apex describe calls have been removed for all API versions. Describe calls include describes for sObjects, fields, field sets, child relationships, picklists, and record types.

You're no longer limited to describing 100 objects or to executing 100 describe statements.

For example, `describeSObjects` can now describe more than 100 sObjects.

```
Schema.DescribeSubjectResult[] results =  
    Schema.describeSObjects(new String[]{'Account', 'Contact', ...});
```

You're no longer bound by 100 `fields` or `fieldSets` statements in your code to describe fields and field sets respectively. The following example shows `fields` and `fieldSets` statements.

```
// Get the field describe result for the Name field on the Account object
Schema.DescribeFieldResult fieldResult = Schema.sObjectType.Account.fields.Name;

// Get information about a field set named fieldset1
Schema.FieldSet fsl = Schema.SObjectType.Account.fieldSets.fieldset1;
```

The previous examples show only a subset of the describe method calls that are no longer bounded by the describe limit. Other method calls include `getChildRelationships()` and `getRecordTypeInfoInfos()` of `Schema.DescribeSObjectResult`, among others.

Also, the associated Limits methods for describe calls are now removed. For earlier versions (API version 30.0 and earlier), these methods still exist but are deprecated. The affected methods are:

- `getChildRelationshipsDescribes()`
- `getFieldsDescribes()`
- `getFieldSetsDescribes()`
- `getPicklistDescribes()`
- `getRecordTypesDescribes()`
- `getLimitChildRelationshipsDescribes()`
- `getLimitFieldsDescribes()`
- `getLimitFieldSetsDescribes()`
- `getLimitPicklistDescribes()`
- `getLimitRecordTypesDescribes()`

## Script Statement Limits Methods Removed

The Limits methods for script statements have been removed but are available and deprecated in API version 30.0 and earlier. Because the script statement limit is no longer enforced in any API version since Winter '14, the associated Limits methods are no longer needed.

The affected methods in the `Limits` class are:

- `getScriptStatements()`
- `getLimitScriptStatements()`

## Create Price Book Entries in Apex Tests

You can create price book entries for standard and custom price books in Apex tests.

Previously, you couldn't create price book entries in an Apex test by default unless the test had access to organization data via the `@isTest(SeeAllData=true)` annotation. With this new support, you can isolate your price book test data from your organization data. Note that custom price books can be created but standard price books cannot.

Support for test price book entries is added for all tests, including tests that use the default data isolation mode (tests that can't access organization data). With this support, you can do the following.

- Query for the ID of the standard price book in your organization with the `Test.getStandardPricebookId()` method.
- Create test price book entries with standard prices by using the standard price book ID that's returned by `Test.getStandardPricebookId()`.

- Create test custom price books, which enables you to add price book entries with custom prices.

## Example

This example creates some test data for price book entries. The test method in this example gets the standard price book ID and uses this ID to create a price book entry for a product with a standard price. Next, the test creates a custom price book and uses the ID of this custom price book to add a price book entry with a custom price.

```
@isTest
public class PriceBookTest {
    // Utility method that can be called by Apex tests to create price book entries.
    static testmethod void addPricebookEntries() {
        // First, set up test price book entries.
        // Insert a test product.
        Product2 prod = new Product2(Name = 'Laptop X200',
            Family = 'Hardware');
        insert prod;

        // Get standard price book ID.
        // This is available irrespective of the state of SeeAllData.
        Id pricebookId = Test.getStandardPricebookId();

        // 1. Insert a price book entry for the standard price book.
        // Standard price book entries require the standard price book ID we got earlier.
        PricebookEntry standardPrice = new PricebookEntry(
            Pricebook2Id = pricebookId, Product2Id = prod.Id,
            UnitPrice = 10000, IsActive = true);
        insert standardPrice;

        // Create a custom price book
        Pricebook2 customPB = new Pricebook2(Name='Custom Pricebook', isActive=true);
        insert customPB;

        // 2. Insert a price book entry with a custom price.
        PricebookEntry customPrice = new PricebookEntry(
            Pricebook2Id = customPB.Id, Product2Id = prod.Id,
            UnitPrice = 12000, IsActive = true);
        insert customPrice;

        // Next, perform some tests with your test price book entries.
    }
}
```

## Submit More Batch Jobs with Apex Flex Queue (Pilot)

You can submit more batch jobs simultaneously and actively manage the order of the queued jobs.



**Note:** This feature is currently available through a pilot program. For information about enabling Apex Flex Queue for your organization, contact [salesforce.com](https://salesforce.com).

The Apex Flex Queue pilot enables you to submit batch jobs beyond the allowed limit of five queued or active jobs. Any jobs that are submitted for execution but aren't processed immediately by the system are in holding status and are placed in a separate queue (the Apex flex queue). Up to 100 batch jobs can be in the holding status. When system resources become available, the system picks up jobs from the Apex flex queue and moves them to the batch job queue. The status of these moved jobs changes from `Holding` to `Queued`. `Queued` jobs get executed when the system is ready to process new jobs.

Without administrator intervention, jobs are processed first-in first-out—in the order in which they're submitted. Administrators can modify the order of jobs that are held in the Apex flex queue to control when they get processed by the system. For example, you can move a batch job up to the first position in the holding queue so that it is the first job that gets processed when the system fetches the next held job from the flex queue.

## Monitoring and Reordering the Apex Flex Queue

You can monitor and reorder batch jobs that are held in the flex queue in the Salesforce user interface. To do so, from Setup, click **Jobs > Apex Flex Queue**. This page lists all batch jobs that are in `holding` status with some information about the job, such as the job ID, the submission date, and the Apex class. By default, these jobs are numbered in the order they were submitted, starting with position 1, which corresponds to the job that was submitted first. You can change the position of a job by clicking **Reorder** next to a job and then entering the position number of the job above which you want to move your job. The system places the job immediately before the specified position with the following exceptions: Specifying a position of 1 or lower moves the job to the beginning of the queue, and specifying a position greater than the number of jobs in the queue moves the job to the end of the queue. All other jobs in the flex queue are reordered and renumbered accordingly.

When the system selects the next job from the Apex flex queue for processing, this job is removed from the Apex flex queue and moved to the batch job queue. You can monitor the moved job in the Apex Jobs page by clicking **Apex Jobs**.

## Submitting Jobs by Calling `Database.executeBatch`

To submit a batch job, call `Database.executeBatch`. The resulting outcome of `Database.executeBatch` depends on whether your organization has reached the five queued or active batch job limit.

- If system resources are available for processing jobs, the batch job is queued for execution and its status is `Queued`.
- If no system resources are available, the batch job is placed in the Apex flex queue and its status is `holding`.
- If the Apex flex queue has the maximum number (100) of jobs, this method returns an error and doesn't place the job in the queue.

## `AsyncApexJob` Status Field

The `AsyncApexJob` object, which represents a batch job, has a new status field value of `holding`. This new status indicates that the job is placed in the Apex flex queue and is waiting to be picked up when system resources are available.

The following table lists all possible statuses for a batch job and a description of each.

Status	Description
holding	Job has been submitted and is held until system resources are freed up.
Queued	Job is awaiting execution.
Preparing	The <code>start</code> method of the job has been invoked. This status might last a few minutes depending on the size of the batch of records.
Processing	Job is being processed.
Aborted	Job was aborted by a user.
Completed	Job completed with or without failures.
Failed	Job experienced a system failure

## Run Future Methods with Higher Limits (Pilot)

Avoid reaching governor limits in your asynchronous future method by running your method with double or triple capacity for a resource.



**Note:** This feature is currently available through a pilot program. For information about enabling enhanced future methods for your organization, contact [salesforce.com](https://salesforce.com).

Apex future methods (methods that are annotated with `@future`) currently have the higher asynchronous limits for heap size, CPU timeout, and number of SOQL queries. This pilot enables you to specify even higher values for these and for additional limits in future methods. If you were exceeding a governor limit in your future method, or if you think a future method requires a higher limit, you can increase this limit for your future method.



**Note:** Running future methods with higher limits might slow down the execution of all your future methods.

One of the following limits can be doubled or tripled for each future method.

- Heap size
- CPU timeout
- Number of SOQL queries
- Number of DML statements issued
- Number of records that were processed as a result of DML operations, `Approval.process`, or `Database.emptyRecycleBin`

The higher limit is specified in the method definition as part of the `@future` annotation by using the `limit` parameter, in the following syntax:

```
@future(limits='2x|3xLimitName')
```

For example, to double the amount of heap size that is allowed in your future method, define your method as follows:

```
@future(limits='2xHeap')
public static void myFutureMethod() {
    // Your code here
}
```



**Tip:** Keep in mind that you can specify only one higher limit per future method. Decide which of the modifiable limits you need the most for your method.

The following limit modifiers are supported. The string value passed to the `limits` parameter inside the annotation is case-insensitive.

Modifier	Description
<code>@future(limits='2xHeap')</code>	Heap size limit is doubled (24 MB).
<code>@future(limits='3xHeap')</code>	Heap size limit is tripled (36 MB).
<code>@future(limits='2xCPU')</code>	CPU timeout is doubled (120,000 milliseconds).
<code>@future(limits='3xCPU')</code>	CPU timeout is tripled (180,000 milliseconds).
<code>@future(limits='2xSOQL')</code>	Number of SOQL queries limit is doubled (400).
<code>@future(limits='3xSOQL')</code>	Number of SOQL queries limit is tripled (600).
<code>@future(limits='2xDML')</code>	Number of DML statements limit is doubled (300).
<code>@future(limits='3xDML')</code>	Number of DML statements limit is tripled (450).
<code>@future(limits='2xDMLRows')</code> <sup>1</sup>	Number of records that were processed as a result of DML operations is doubled (20,000).

Modifier	Description
<code>@future (limits='3xDMLRows')</code> <sup>1</sup>	Number of records that were processed as a result of DML operations is tripled (30,000).

<sup>1</sup> Includes `Approval.process` and `Database.emptyRecycleBin` operations.

## New and Changed Apex Classes

These methods, classes, and interfaces are new or have changed in this release.

### New Methods

The following existing classes have new methods.

#### Flow.Interview class:

**start()**

Launches a trigger-ready flow.

#### System.Crypto class:

**signWithCertificate(String, Blob, String)**

Computes a unique digital signature for the input string, using the specified algorithm and the supplied certificate and key pair.

**signXML(String, Dom.XmlNode, String, String)**

Envelops the signature into an XML document.

#### System.Limits class:

**getLimitMobilePushApexCalls()**

Returns the total number of Apex calls that are allowed per day for mobile push notifications.

**getMobilePushApexCalls()**

Returns the number of Apex calls that have been used by mobile push notifications during the current metering interval.

#### System.String class:

**charAt(Integer)**

Returns the value of the character at the specified index.

**codePointAt(Integer)**

Returns the Unicode code point value at the specified index.

**codePointBefore(Integer)**

Returns the Unicode code point value that occurs before the specified index.

**codePointCount(Integer, Integer)**

Returns the number of Unicode code points within the specified text range.

**getChars ()**

Returns an array of character values that represent the characters in this string.

**indexOfChar (Integer)**

Returns the index of the first occurrence of the character that corresponds to the specified character value.

**indexOfChar (Integer, Integer)**

Returns the index of the first occurrence of the character that corresponds to the specified character value, starting from the specified index.

**lastIndexOfChar (Integer)**

Returns the index of the last occurrence of the character that corresponds to the specified character value.

**lastIndexOfChar (Integer, Integer)**

Returns the index of the last occurrence of the character that corresponds to the specified character value, starting from the specified index.

**offsetByCodePoints (Integer, Integer)**

Returns the index of the Unicode code point that is offset by the specified number of code points, starting from the given index.

**System.System class:****equals (Object, Object)**

Returns `true` if both arguments are equal. Otherwise, returns `false`.

**hashCode (Object)**

Returns the hash code of the specified object.

**System.Test class:****getStandardPricebookId ()**

Returns the ID of the standard price book in the organization.

## Changed Methods

The following classes have changed methods.

**System.Crypto class:****sign (String, Blob, Blob)**

The `Crypto.sign ()` method now supports both `RSA-SHA1` and `RSA-SHA256` values for the `algorithmName` parameter.

## New Classes

**Canvas.Test**

Contains methods for automated testing of your Canvas classes.

**mockRenderContext (Map<String, String>, Map<String, String>)**

Creates and returns a test `Canvas.RenderContext` based on the provided application and environment context parameters.

**testCanvasLifecycle (Canvas.CanvasLifecycleHandler, Canvas.RenderContext)**

Calls the canvas test framework to invoke a CanvasLifecycleHandler with the provided RenderContext.

### **Messaging.PushNotification**

PushNotification is used to configure push notifications and send them from an Apex trigger.

**PushNotification ()**

Creates a new instance of the Messaging.PushNotification class.

**PushNotification (Map<String, Object> payload)**

Creates a new instance of the Messaging.PushNotification class using the specified payload parameters as key-value pairs. When you use this constructor, you don't need to call setPayload to set the payload.

**send (String application, Set<String> users)**

Sends a push notification message to the specified users.

**setPayload (Map<String, Object> payload)**

Sets the payload of the push notification message.

**setTtl (Integer ttl)**

Reserved for future use.

### **Messaging.PushNotificationPayload**

Contains methods to create the notification message payload for an Apple device.

**apple (String alert, String sound, Integer badgeCount, Map<String, Object> userData)**

Helper method that creates a valid Apple payload from the specified arguments.

**apple (String alertBody, String actionLocKey, String locKey, String[] locArgs, String launchImage, String sound, Integer badgeCount, Map<String, Object> userData)**

Helper method that creates a valid Apple payload from the specified arguments.

## **New Interfaces**

### **Canvas.ApplicationContext**

Use this interface to retrieve application context information, such as the application version or URL.

**getCanvasUrl ()**

Retrieves the fully qualified URL of the canvas app.

**getDeveloperName ()**

Retrieves the internal API name of the canvas app.

**getName ()**

Retrieves the name of the canvas app.

**getNamespace ()**

Retrieves the namespace prefix of the canvas app.

**getVersion ()**

Retrieves the current version of the canvas app.

**setCanvasUrlPath (String)**

Overrides the URL of the canvas app for the current request.

**Canvas.CanvasLifecycleHandler**

Implement this interface to control context information and add custom behavior during the application render phase.

**excludeContextTypes ()**

Lets the implementation exclude parts of the CanvasRequest context, if the application does not need it.

**onRender (Canvas.RenderContext)**

Invoked when a canvas app is rendered. Provides the ability to set and retrieve canvas application and environment context information during the application render phase.

**Canvas.EnvironmentContext**

Use this interface to retrieve environment context information, such as the app display location or the configuration parameters.

**addEntityField (String)**

Adds a field to the list of object fields that are returned in the signed request Record object when the component appears on a Visualforce page that's placed on an object.

**addEntityFields (Set<String>)**

Adds a set of fields to the list of object fields that are returned in the signed request Record object when the component appears on a Visualforce page that's placed on an object.

**getDisplayLocation ()**

Retrieves the display location where the canvas app is being called from. For example, a value of Visualforce indicates that the canvas app was called from a Visualforce page.

**getEntityFields ()**

Retrieves the list of object fields that are returned in the signed request Record object when the component appears on a Visualforce page that's placed on an object.

**getLocationUrl ()**

Retrieves the location URL of the canvas app.

**getParametersAsJSON ()**

Retrieves the current custom parameters for the canvas app. Parameters are returned as a JSON string.

**getSublocation ()**

Retrieves the display sublocation where the canvas app is being called from.

**setParametersAsJSON (String)**

Sets the custom parameters for the canvas app.

**Canvas.RenderContext**

A wrapper interface that is used to retrieve application and environment context information.

**getApplicationContext ()**

Retrieves the application context information.

**getEnvironmentContext ()**

Retrieves the environment context information.

## Chatter in Apex (ConnectApi)

To create custom Chatter experiences in Salesforce, use Chatter in Apex.

Many Chatter REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Chatter in Apex*.

In Apex, it's possible to access some Chatter data using SOQL queries and objects. However, `ConnectApi` classes expose Chatter data in a much simpler way. Data is localized and structured for display. For example, instead of making many calls to access and assemble a feed, you can do it with a single call.



**Note:** To integrate mobile apps, intranet sites, and third party Web applications with Chatter, use [Chatter REST API](#).

[General Updates to Chatter in Apex](#)

[New and Changed Chatter in Apex Classes](#)

[New and Changed Chatter in Apex Input Classes](#)

[New and Changed Chatter in Apex Output Classes](#)

[New and Changed Chatter in Apex Enums](#)

## General Updates to Chatter in Apex

**Documentation indicates whether a method requires Chatter**

Each `ConnectApi` method in the *Apex Developer's Guide* has a section indicating whether or not the method requires that the user calling the method has access to Chatter. To verify that the user has access, check the `hasChatter` property of the `ConnectApi.UserDetails` or the `ConnectApi.UserSettings` output objects.

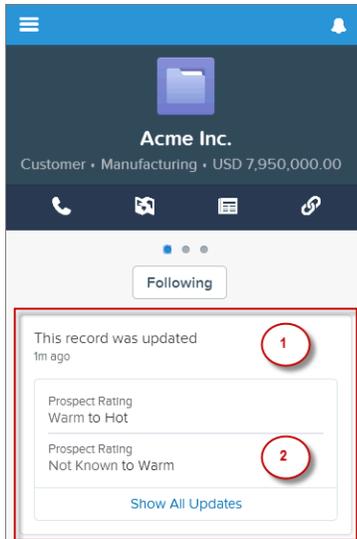
## New and Changed Chatter in Apex Classes

### Feed Elements

In API versions 30.0 and earlier, a feed contains feed items. As of API version 31.0, a feed contains *feed elements*.

The `ConnectApi.FeedElement` class is abstract. In API version 31.0, its concrete subclasses are `ConnectApi.FeedItem` and `ConnectApi.Bundle`. A *bundle* (or *bundled post*) contains feed elements and keeps the feed clean and organized. In Summer '14, bundled posts are collections of feed tracked change feed items in record feeds only and are supported in the Salesforce1 mobile browser app only. Bundled posts are available through a pilot program. For information on enabling bundled posts for your organization, contact [salesforce.com](mailto:salesforce.com).

The feed element in this image is a bundle of feed tracked changes for the Acme Inc. account:



1. The header indicating that this bundle contains feed tracked changes for a record.
2. The auxiliary body indicating the changed field and the new and old values.

To see the individual feed tracked change feed items, click on the bundle.

To get a feed that includes bundles, call `ChatterFeeds.getFeedElementsFromFeed(String communityId, ConnectApi.FeedType feedType, String subjectId, Integer recentCommentCount, Integer elementsPerBundle, ConnectApi.FeedDensity density, String pageParam, Integer pageSize, ConnectApi.FeedSortOrder sortParam, Boolean showInternalOnly)` and pass `ConnectApi.FeedType.Record` for the `feedType` parameter.

In API versions 30.0 and earlier, every feed item supported comments, likes, topics, and so on. In versions 31.0 and later, every feed item (and feed element) can have a unique set of *capabilities*. If a capability property exists on a feed element, that capability is available, even if the capability property doesn't have a value. For example, if the `ChatterLikes` capability property exists on a feed element (with or without a value), the logged-in user can like that feed element. If the capability property doesn't exist, it isn't possible to like that feed element. A capability can also contain associated data. For example, the `Moderation` capability contains data about moderation flags.

Methods that get feed elements return `ConnectApi.FeedElementPage` objects, which contain a list of `ConnectApi.FeedElement` objects. The `ConnectApi.FeedElement.capabilities` property contains a `ConnectApi.FeedElementCapabilities` object that contains all the capabilities of a particular feed element.



**Tip:** The `getFeedItem` and `postFeedItem` methods are still supported, but to future-proof your applications, use the `getFeedElement` and `postFeedElement` methods. For example, as of API version 31.0, the only feed element types are feed item and bundle, but that could change in future releases.

### Get feed elements for a favorite

These new `ChatterFavorites.getFeedElements` methods get feed elements instead of feed items for a favorite.

- `getFeedElements(String, String, String)`—Returns the first page of feed elements for the specific favorite in the specified community.
- `getFeedElements(String, String, String, String, Integer, ConnectApi.FeedSortOrder)`—Returns the specified page of feed elements for the specified favorite, in the specified community in the specified order.
- `getFeedElements(String, String, String, Integer, Integer, String, Integer, ConnectApi.FeedSortOrder)`—Returns the specified page of feed elements for the specified favorite, in the

specified community in the specified order and includes no more than the specified number of comments per feed element.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Delete a feed element

Delete a specific feed element with this new `ChatterFeeds` method: `deleteFeedElement(String, String)`.

### Get a specific feed element

These new `ChatterFeeds.getFeedElement` methods get a specific feed element:

- `getFeedElement(String, String)`—Returns information about the specified feed element.
- `getFeedElement(String, String, Integer, Integer)`—Returns information about the specified feed element with the specified number of elements per bundle including no more than the specified number of comments per feed element.

### Get information about a list of feed elements

Get information about a list of feed elements with this new `ChatterFeeds` method: `getFeedElementBatch(String, List<String>)`.

### Get feed elements from a bundle

A *bundle* is a feed element that is a container of feed elements. These new `ChatterFeeds.getFeedElementsFromBundle` methods get feed elements from a bundle:

- `getFeedElementsFromBundle(String, String)`—Returns the first page of feed-elements from a bundle.
- `getFeedElementsFromBundle(String, String, String, Integer, Integer, Integer)`—Returns the feed elements on the specified page for the bundle. Each feed element includes no more than the specified number of comments. Specify the maximum number of feed elements in a bundle.

### Get feed elements from a feed

These new `ChatterFeeds.getFeedElementsFromFeed` methods get feed elements. Feed elements are new in Summer '14. Feed elements are the top-level items that a feed contains. Feeds are feed element containers. A feed element is an abstract object. In concrete form, it can be either a feed item or a bundle.

Use these methods to get feed elements from the company feed or the moderation feed:

- `getFeedElementsFromFeed(String, ConnectApi.FeedType)`—Returns the first page of feed elements from the Company and Moderation feed types. The page contains the default number of items.
- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedSortOrder)`—Returns the feed items for the specified page for the Company and Moderation feed types, in the specified order.
- `getFeedElementsFromFeed(String, ConnectApi.FeedType, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder)`—Returns the feed elements for the specified page for the Company and Moderations feed types, in the specified order. Each feed element contains no more than the specified number of comments.

Use these methods to get feed elements from any feed other than the company feed, moderation feed, or a filter feed:

- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String)`—Returns the first page of feed elements for the specified feed type, for the specified user or record. The page contains the default number of elements.
- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String, String, Integer, ConnectApi.FeedSortOrder)`—Returns the feed elements on the specified page for the specified user or record, for the specified feed type in the specified order.
- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder)`—Returns the feed

elements on the specified page for the specified user or record, for the specified feed type in the specified order. Each feed element includes no more than the specified number of comments.

- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, Boolean)`—Returns the feed elements on the specified page for the specified user or record, for the specified feed type in the specified order. Each feed element includes no more than the specified number of comments. Specify whether to return feed elements posted by internal (non-community) users only.
- `getFeedElementsFromFeed(String, ConnectApi.FeedType, String, Integer, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, Boolean)`—Returns the feed elements on the specified page for the specified user or record, for the specified feed type in the specified order. Each feed element includes no more than the specified number of comments. Specify whether to return feed elements posted by internal (non-community) users only. Specify the maximum number of feed elements in a bundle.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Get feed elements from a feed updated since the last request

These new `ChatterFeeds.getFeedElementsFromFeedUpdatedSince` methods get feed elements instead of feed items.

Use these methods to get feed elements from the company or the moderation feed:

- `getFeedElementsUpdatedSince(String, ConnectApi.FeedType, Integer, ConnectApi.FeedDensity, String, Integer, String)`—Returns the specified page of feed elements for the `Company` and `Moderation` feed types. Includes only feed elements that have been updated since the time specified in the `updatedSince` parameter. Each feed element contains no more than the specified number of comments.

Use these methods to get feed elements from any feed other than the company feed, moderation feed, or a filter feed:

- `getFeedElementsUpdatedSince(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, String)`—Returns the specified page of feed elements for the `Files`, `Groups`, `News`, `People`, and `Record` feed types. Includes only feed elements that have been updated since the time specified in the `updatedSince` parameter. Each feed element contains no more than the specified number of comments.
- `getFeedElementsUpdatedSince(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, String, Boolean)`—Returns the specified page of feed elements for the `Record` feed type. Includes only feed elements that have been updated since the time specified in the `updatedSince` parameter. Specify whether to return feed elements posted by internal (non-community) users only.
- `getFeedElementsUpdatedSince(String, ConnectApi.FeedType, String, Integer, Integer, ConnectApi.FeedDensity, String, Integer, String, Boolean)`—Returns the specified page of feed elements for the `Record` feed type. Includes only feed elements that have been updated since the time specified in the `updatedSince` parameter. Specify whether to return feed elements posted by internal (non-community) users only. Specify the maximum number of feed elements in a bundle.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Get feed elements from a filtered feed

These new `ChatterFeeds.getFeedElementsFromFilterFeed` methods get feed elements instead of feed items from a filtered feed.

- `getFeedElementsFromFilterFeed(String, String, String)`—Returns the first page of feed elements for the specified user and the specified key prefix.
- `getFeedElementsFromFilterFeed(String, String, String, String, Integer, ConnectApi.FeedSortOrder)`—Returns the specified page of feed elements for the specified user and the specified key prefix, in the specified order.

- `getFeedElementsFromFilterFeed(String, String, String, Integer, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder)`—Returns the specified page of feed elements for the specified user and the specified key prefix, in the specified order. Each feed element contains no more than the specified number of comments.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Get feed elements from a filtered feed updated since the last request

This new `ChatterFeeds.getFeedElementsFromFilterFeedUpdatedSince` method gets feed elements instead of feed items.

- `getFeedElementsFromFilterFeedUpdatedSince(String, String, String, Integer, Integer, ConnectApi.FeedDensity, String, Integer, String)`—Returns the specified page of feed elements for the specified user and the specified key prefix. Includes only feed elements that have been updated since the time specified in the `updatedSince` parameter.

This method has an associated `setTest` method to register data for use in a test context.

### Post feed elements

Post feed elements with these new `ChatterFeeds` methods:

- `postFeedElement(String, String, ConnectApi.FeedElementType, String)`—Posts a feed element with plain text from the context user.
- `postFeedElement(String, ConnectApi.FeedElementInput, ConnectApi.BinaryInput)`—Posts a feed element from the context user. Use this method to post rich text, including mentions and hashtag topics, and to attach a file to a feed element. You can also use this method to share a feed element and add a comment.

### Search feed elements

These new `ChatterFeeds.searchFeedElements` methods get feed elements instead of feed items.

Use these methods to get feed elements from the company feed or the moderation feed:

- `searchFeedElements(String, String)`—Returns the first page of all the feed elements that match the specified search criteria.
- `searchFeedElements(String, String, ConnectApi.FeedSortOrder)`—Returns the first page of all the feed elements that match the specified search criteria in the specified order.
- `searchFeedElements(String, String, String, Integer)`—Searches feed elements and returns a specified page and page size of search results.
- `searchFeedElements(String, String, String, Integer, ConnectApi.FeedSortOrder)`—Searches feed elements and returns a specified page and page size in a specified order.
- `searchFeedElements(String, String, Integer, String, Integer, ConnectApi.FeedSortOrder)`—Searches feed elements and returns a specified page and page size in a specified order. Each feed element includes no more than the specified number of comments.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Search feed elements in a feed

These new `ChatterFeeds.searchFeedElementsInFeed` methods get feed elements instead of feed items. Feed elements are the top-level items that a feed contains. Feeds are feed element containers.

Use these methods to get feed elements from the company feed or the moderation feed:

- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String)`—Searches the feed elements for the `Company` and `Moderation` feed types.
- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements for the `Company` and `Moderation` feed types and returns a specified page and page size in a specified sort order.

- `searchFeedElementsInFeed(String, ConnectApi.FeedType, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements for the Company and Moderation feed types and returns a specified page and page size in a specified sort order. Each feed element includes no more than the specified number of comments.

Use these methods to get feed elements from any feed other than the company feed, moderation feed, or a filter feed:

- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String, String)`—Searches the feed items for a specified feed type.
- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements for a specified feed type and context user, and returns a specified page and page size in a specified sort order.
- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements for a specified feed type and returns a specified page and page size in a specified sort order. Each feed element includes no more than the specified number of comments.
- `searchFeedElementsInFeed(String, ConnectApi.FeedType, String, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, String, Boolean)`—Searches the feed elements for a specified feed type and context user, and returns a specified page and page size in a specified sort order. Each feed element includes no more than the specified number of comments. Specify whether to return feed elements posted by internal (non-community) users only.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Search feed elements in a filtered feed

These new `ChatterFeeds.searchFeedElementsInFilterFeed` methods search feed elements instead of feed items in a filtered feed.

- `searchFeedElementsInFilterFeed(String, String, String, String)`—Searches the feed elements of a feed filtered by key prefix.
- `searchFeedElementsInFilterFeed(String, String, String, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements of a feed filtered by key prefix, and returns a specified page and page size in a specified sort order.
- `searchFeedElementsInFilterFeed(String, String, String, Integer, ConnectApi.FeedDensity, String, Integer, ConnectApi.FeedSortOrder, String)`—Searches the feed elements of a feed filtered by key prefix, and returns a specified page and page size in a specified sort order. Each feed element includes no more than the specified number of comments.

Each of these methods has an associated `setTest` method to register data for use in a test context.

### Share feed elements

Share feed elements with this new `ChatterFeeds` method: `shareFeedElement(String, String, ConnectApi.FeedElementType, String)`.

### Get, add, and remove moderation flags to and from feed elements

Use these new `CommunityModeration` methods to get, add, and remove moderation flags to and from feed elements.

- `addFlagToFeedElement(String, String)`—Add a moderation flag to a feed element. To add a flag to a feed element, `Allow members to flag content` must be selected for a community.
- `addFlagToFeedElement(String, String, ConnectApi.CommunityFlagVisibility)`—Add a moderation flag with specified visibility to a feed element. To add a flag to a feed element, `Allow members to flag content` must be selected for a community.
- `getFlagsOnFeedElement(String, String)`—Get the moderation flags on a feed element. To get the flags, the logged-in user must have the `Moderate Communities Feeds` permission.

- `getFlagsOnFeedElement(String, String, ConnectApi.CommunityFlagVisibility)`—Get the moderation flags with specified visibility on a feed element. To get the flags, the logged-in user must have the `Moderate Communities Feeds` permission.
- `removeFlagFromFeedElement(String, String, String)`—Remove a moderation flag from a feed element. To remove a flag from a feed element, the logged-in user must have added the flag or must have the `Moderate Communities Feeds` permission.

## Other Changes to Chatter in Apex Classes

### Access public Chatter groups from a guest user account

If your community allows access without logging in, all signatures of these methods are available to guest users. These methods return information the guest user has access to.

`ChatterFeeds` methods:

- `getComment()`
- `getCommentsForFeedItem()`
- `getFeedElement()`
- `getFeedElementsFromFeed()`
- `getFeedElementsUpdatedSince()`
- `getFeedItem()`
- `getFeedItemsFromFeed()`
- `getFeedItemsUpdatedSince()`
- `getLikesForComment()`
- `getLikesForFeedItem()`
- `searchFeedElements()`
- `searchFeedElementsInFeed()`
- `searchFeedItems()`
- `searchFeedItemsInFeed()`

`ChatterGroups` methods:

- `getGroup()`
- `getGroups()`
- `searchGroups()`

### Update, delete, or get information about an announcement

Use the new `ConnectApi.Announcements` class to get and post information about announcements. An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

It has these methods:

- `deleteAnnouncement(String, String)`—Deletes the specified announcement.
- `getAnnouncement(String, String)`—Gets information about the specified announcement.
- `updateAnnouncement(String, String, Date)`—Updates the expiration date of an existing announcement.

### Post an announcement or get information about all announcements in a group

The `ConnectApi.ChatterGroups` class has these new methods for getting and posting announcements:

- `getAnnouncements(String, String)`—Gets the first page of announcements in a group.
- `getAnnouncements(String, String, Integer, Integer)`—Gets the specified page of announcements in a group.

- `postAnnouncement(String, String, ConnectApi.AnnouncementInput)`—Posts an announcement to a group.

### Get information about a batch of feed items

`ConnectApi.ChatterFeeds.getFeedItemBatch(String, List<String>)`—Returns information about the specified list of feed items. Returns a list of `BatchResult` objects containing `ConnectApi.FeedItem` objects. Errors for feed items that can't be loaded are returned in the results.

### Get information about a batch of Chatter groups

`ConnectApi.ChatterGroups.getGroupBatch(String, List<String>)`—Gets information about the specified list of groups. Returns a list of `BatchResult` objects containing `ConnectApi.ChatterGroup` objects. Returns errors embedded in the results for groups that couldn't be loaded.

### Get information about a batch of Chatter group memberships

`ConnectApi.ChatterGroups.getMembershipBatch(String, List<String>)`—Gets information about the specified list of group memberships. Returns a list of `BatchResult` objects containing `ConnectApi.GroupMember` objects. Returns errors embedded in the results for group memberships that couldn't be accessed.

### Get information about a batch of record motifs

`ConnectApi.Records.getMotifBatch(String, List<String>)`—Gets a motif for the specified list of objects. Returns a list of `BatchResult` objects containing `ConnectApi.Motif` objects. Returns errors embedded in the results for those users that couldn't be loaded.

### Get information about a batch of Chatter users

`ConnectApi.ChatterUsers.getUserBatch(String, List<String>)`—Gets information about the specified list of users. Returns a list of `BatchResult` objects containing `ConnectApi.User` objects. Returns errors embedded in the results for those users that couldn't be loaded.

## New and Changed Chatter in Apex Input Classes

### `ConnectApi.AnnouncementInput`

This new class represents an announcement. An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

It has these properties:

- `body`—Text of the announcement.
- `expirationDate`—The Salesforce UI displays an announcement until 11:59 p.m. on this date unless another announcement is posted first. The Salesforce UI ignores the time value in the `expirationDate`. However, you can use the time value to create your own display logic in your own UI.

### `ConnectApi.ChatterGroupInput`

This class has a new `announcement` property, which is the 18-character ID of an announcement. An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

### `ConnectApi.FeedElementInput`

Feed elements are the top-level items that a feed contains. Feeds are feed element containers.

This class is abstract. It's a superclass of `ConnectApi.FeedItemInput` and has these properties:

- `feedElementType`—The type of feed element this input represents. The only possible value is `FeedItem`.
- `subjectId`—The ID of the parent this feed element is being posted to. This value can be the ID of a user, group, or record, or the string `me` to indicate the logged-in user.

**ConnectApi.FeedItemInput**

This class now inherits from `ConnectApi.FeedElementInput`.

## New and Changed Chatter in Apex Output Classes

**ConnectApi.AbstractBundleCapability**

If a feed element has this capability, it can be a container of feed elements called a *bundle*.

This class is a subclass of `ConnectApi.FeedElementCapability`.

This class has these properties:

- `bundleType`—Defines this feed element's bundle type. The bundle type determines what additional information appears in the bundle.
- `feedElements`—A collection of feed elements.
- `totalElements`—The total number of feed elements that this bundle aggregates.

**ConnectApi.Announcement**

An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

This new class has these properties:

- `expirationDate`—The Salesforce UI displays an announcement until 11:59 p.m. on this date unless another announcement is posted first. The Salesforce UI ignores the time value in the `expirationDate`. However, you can use the time value to create your own display logic in your own UI.
- `feedElement`—The feed element that contains the body of the announcement and its associated comments, likes, and so on.
- `id`—18-character ID of the announcement.

**ConnectApi.AnnouncementPage**

A collection of announcements.

This new class has these properties:

- `announcements`—A collection of `ConnectApi.Announcement` objects.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

**ConnectApi.BannerCapability**

If a feed element has this capability, it has a banner motif and style.

This class is a subclass of `ConnectApi.FeedElementCapability`.

This class has these properties:

- `motif`—A `ConnectApi.Motif` object.
- `style`—A `ConnectApi.BannerStyle` enum specifying the color and icon set of the banner.

**ConnectApi.BatchResult**

Calls to batch methods return a list of `BatchResult` objects. Each element in the `BatchResult` list corresponds to the strings in the list parameter passed to the batch method. The first element in the `BatchResult` list matches the first string passed in the list parameter, the second element corresponds with the second string, and so on. If only one string is passed, the `BatchResult` list contains a single element.

This new output class has these instance methods:

- `getError()`—If an error occurred, returns a `ConnectApi.ConnectApiException` object providing the error code and description.
- `getErrorMessage()`—Returns a `String` that contains an error message.
- `getErrorTypeName()`—Returns a `String` that contains the name of the error type.
- `getResult()`—Returns an object that contains the results of the batch operation. The object is typed according to the batch method. For example, if you call `getMembershipBatch()`, a successful call to `BatchResult.getResult()` returns a `ConnectApi.GroupMembership` object.
- `isSuccess()`—Returns a `Boolean` that is set to `true` if the batch operation was successful for this object, `false` otherwise.

#### **ConnectApi.BookmarksCapability**

If a feed element has this capability, the logged-in user can bookmark it.

This class is a subclass of `ConnectApi.FeedElementCapability`.

#### **ConnectApi.Bundle**

A *bundle* is a feed element that is a container of feed elements.

This class is a subclass of `ConnectApi.FeedElement`.

This class has these properties:

- `bundleType`—Specifies the type of bundle. One of these values:
  - ◊ `GenericBundle`—A bundle that contains no additional information and is just a collection of feed elements.
  - ◊ `TrackedChanges`—A bundle that represents a collection of feed tracked changes. The bundle includes summary information about the feed tracked changes that make up the bundle.

#### **ConnectApi.ChatterGroup**

This class has these new properties:

- `announcement`—A `ConnectApi.Announcement` object
- `lastFeedElementPostDate`—ISO8601 date string, for example, 2011-02-25T18:24:31.000Z, of the most recent feed element posted to the group

Use `lastFeedElementPostDate` instead of `lastFeedItemPostDate`, which is not supported in API versions 31.0 and later.

#### **ConnectApi.ChatterLikesCapability**

If a feed element has this capability, the logged-in user can like it.

This class is a subclass of `ConnectApi.FeedElementCapability`.

#### **ConnectApi.CommentsCapability**

If a feed element has this capability, the logged-in user can add a comment to it.

This class is a subclass of `ConnectApi.FeedElementCapability`.

#### **ConnectApi.Community**

This output class has these new properties:

- `allowChatterAccessWithoutLogin`—Specifies if guest users can access public groups in the community without logging in.
- `reputationEnabled`—Specifies whether reputation is calculated and displayed for members of the community.

**ConnectApi.ContentAttachment**

This output class has a new `contentUrl` property, which specifies the URL of the content if it's a link or a Google Doc; otherwise the property returns `null`.

**ConnectApi.File**

This class has one new property, `isMajorVersion`, which is `true` if the file is a major version; `false` if the file is a minor version. Major versions can't be replaced.

**ConnectApi.Features**

This output class has a new `communitiesEnabled` property, which specifies whether Salesforce Communities is enabled.

**ConnectApi.Feed**

This class has these new properties:

- `feedElementPostUrl`—Chatter REST API URL for posting feed elements to this subject.
- `feedElementsUrl`—Chatter REST API URL of feed elements.

**ConnectApi.FeedDirectoryItem**

This class has one new property, `feedElementsUrl`, which is a Chatter REST API resource URL for the feed elements.

**ConnectApi.FeedElement**

Feed elements are the top-level items that a feed contains. Feeds are feed element containers.

This class has these properties:

- `body`—Information about the feed element.
- `capabilities`—A container for all capabilities that can be included with a feed element.
- `createdDate`—The date the feed element was created. An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `feedElementType`—Feed elements are the top-level objects that a feed contains. The feed element type describes the characteristics of that feed element. One of these values:
  - ◇ `Bundle`—A container of feed elements. A bundle also has a body made up of message segments that can always be gracefully degraded to text-only values.
 

**Note:** Bundled posts are available through a pilot program. For information, contact Salesforce.com. During the pilot, bundles contain only feed-tracked changes and are displayed only in record feeds and only in the Salesforce1 mobile browser app.
  - ◇ `FeedItem`—A feed item has a single parent and is scoped to one community or across all communities. Feed items can have comments, likes, and topics. Depending on the feed item type, a feed item can have an attachment of additional information (a poll, file, dashboard, and so on). Feed items have a body made up of message segments that can always be gracefully degraded to text-only values.
- `header`—The header is the title of the post. This property contains renderable plain text for all the segments of the message. If a client doesn't know how to render a feed element type, it should render this text.
- `id`—18-character ID of the feed element.
- `modifiedDate`—The date the feed element was last modified. An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `parent`—A `ConnectApi.ActorWithId` object representing the feed element's parent.
- `relativeCreatedDate`—The created date formatted as a relative, localized string, for example, "17m ago" or "Yesterday."
- `url`—Chatter REST API URL to the feed element.

**ConnectApi.FeedElementCapabilities**

A container for all capabilities that can be included with a feed element.

This class has these properties:

- `banner`—If a feed element has this capability, it has a banner motif and style.
- `bookmarks`—If a feed element has this capability, the logged-in user can bookmark it.
- `bundle`—If a feed element has this capability, it can be a container of feed elements called a *bundle*.
- `chatterLikes`—If a feed element has this capability, the logged-in user can like it.
- `comments`—If a feed element has this capability, the logged-in user can add a comment to it.
- `moderation`—If a feed element has this capability, users in a community can flag it for moderation.
- `poll`—If a feed element has this capability, it can include a poll.
- `questionAndAnswers`—If a feed element has this capability, users can answer questions on the feed element instead of commenting.
- `topics`—If a feed element has this capability, the logged-in user can add topics to it. Topics help users organize and discover conversations.

**ConnectApi.FeedElementCapability**

A feed element capability, which defines the characteristics of a feed element.

In API versions 30.0 and earlier, every feed item supported comments, likes, topics, and so on. In versions 31.0 and later, every feed item (and feed element) can have a unique set of *capabilities*. If a capability property exists on a feed element, that capability is available, even if the capability property doesn't have a value. For example, if the `ChatterLikes` capability property exists on a feed element (with or without a value), the logged-in user can like that feed element. If the capability property doesn't exist, it isn't possible to like that feed element. A capability can also contain associated data. For example, the `Moderation` capability contains data about moderation flags.

This class is abstract and is a superclass of:

- `ConnectApi.AbstractBundleCapability`
- `ConnectApi.BannerCapability`
- `ConnectApi.BookmarksCapability`
- `ConnectApi.ChatterLikesCapability`
- `ConnectApi.CommentsCapability`
- `ConnectApi.ModerationCapability`
- `ConnectApi.PollCapability`
- `ConnectApi.QuestionAndAnswersCapability`
- `ConnectApi.TopicsCapability`

**ConnectApi.FeedElementPage**

A paged collection of `ConnectApi.FeedElement` objects.

This class has these properties:

- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `elements`—A collection of feed elements.
- `isModifiedToken`—An opaque polling token to use in the `since` parameter of the `ChatterFeeds.isModified` method. The token describes when the feed was last modified.
- `isModifiedUrl`—A Chatter REST API URL with a `since` request parameter that contains an opaque token that describes when the feed was last modified. Returns `null` if the feed isn't a news feed. Use this URL to poll a news feed for updates.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.

- `updatesToken`—A token to use in a request to the `ConnectApi.ChatterFeeds.getFeedElementsUpdatedSince` method.
- `updatesUrl`—A Chatter REST API feed resource containing the feed elements that have been updated since the feed was refreshed. If the feed doesn't support this feature, the value is `null`.

### **ConnectApi.FeedItem**

This class now inherits from `ConnectApi.FeedElement`.

These properties have been moved to `ConnectApi.FeedElement`:

- `ConnectApi.FeedItem.body`
- `ConnectApi.FeedItem.createdDate`
- `ConnectApi.FeedItem.id`
- `ConnectApi.FeedItem.modifiedDate`
- `ConnectApi.FeedItem.parent`
- `ConnectApi.FeedItem.relativeDate`
- `ConnectApi.FeedItem.url`

The `moderationFlags` property is not supported in API versions 31.0 and later. Moderation flags are now available in the `ConnectApi.ModerationCapability` object, which you can access from the `ConnectApi.FeedElement.capabilities` property.

The `preamble` property has been moved to `ConnectApi.FeedElement` and renamed `header`. Use the `ConnectApi.FeedElement.header` property as the default case for rendering text.

### **ConnectApi.GenericBundleCapability**

If a feed element has this capability, the feed element may be a group of other feed elements condensed into one feed element. This group is called a *bundle*.

This class is a subclass of `ConnectApi.AbstractBundleCapability`.

### **ConnectApi.GroupMember**

This class has a new `lastFeedAccessDate` property, which is the date on which the group member last accessed the group feed.

### **ConnectApi.ModerationCapability**

If a feed element has this capability, it can include a poll.

This class is a subclass of `ConnectApi.FeedElementCapability`.

This class has one property, `moderationFlags`, which is a `ConnectApi.ModerationFlags` object describing the flags associated with this feed element. Community moderators can view and take action on flagged feed elements.

### **ConnectApi.PollCapability**

If a feed element has this capability, it can include a poll.

This class is a subclass of `ConnectApi.FeedElementCapability`.

### **ConnectApi.QuestionAndAnswersCapability**

If a feed element has this capability, users can answer questions on the feed element instead of commenting.

This class is a subclass of `ConnectApi.FeedElementCapability`.

### **ConnectApi.TopicsCapability**

If a feed element has this capability, the logged-in user can add topics to it. Topics help users organize and discover conversations.

This class is a subclass of `ConnectApi.FeedElementCapability`.

**ConnectApi.TrackedChangeBundleCapability**

If a feed element has this capability, it can be a group of other feed elements aggregated into one feed element called a *bundle*. This type of bundle aggregates feed tracked changes.

This class is a subclass of `ConnectApi.AbstractBundleCapability`.

In addition to the property it inherits, this class has one property, `changes`, which is a List of `ConnectApi.TrackedChangeItem` objects.

**ConnectApi.User**

If a community allows access without logging in, the value of the `companyName` and `title` properties is `null` for guest users.

**ConnectApi.UserDetail**

This class has a new `hasChatter` property, which is `true` if the user has access to Chatter.

**ConnectApi.UserSettings**

This class has a new `hasChatter` property, which is `true` if the user has access to Chatter.

## New and Changed Chatter in Apex Enums

**ConnectApi.BannerStyle**

Decorates a feed item with a color and set of icons.

- `Announcement`—An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

**ConnectApi.BundleType**

Specifies the type of bundle.

- `GenericBundle`—A bundle that contains no additional information and is just a collection of feed elements.
- `TrackedChanges`—A bundle that represents a collection of feed tracked changes. The bundle includes summary information about the feed tracked changes that make up the bundle.

**ConnectApi.FeedElementCapabilityType**

Specifies the capabilities of a feed element in API versions 31.0 and later. If a capability exists on a feed element, the capability is available. If the capability doesn't exist, it isn't available.

- `AssociatedActions`—Reserved for future use.
- `Banner`—The body of the feed element has an icon and border.
- `Bookmarks`—The logged-in user can bookmark the feed element. Bookmarked feed elements are visible in the bookmarks feed.
- `Bundle`—The feed element can be a group of other feed elements that display as a bundle in the feed. The bundle type determines the additional data associated with the bundle.



**Note:** Bundled posts are available through a pilot program. For information, contact Salesforce.com. During the pilot, bundles contain only feed-tracked changes and are displayed only in record feeds and only in the Salesforce1 mobile browser app.

- `ChatterLikes`—The logged-in user can like the feed element.
- `Comments`—The logged-in user can add comments to the feed element.
- `Moderation`—Users in a community can flag the feed element for moderation.
- `Poll`—The feed element supports poll voting.
- `QuestionAndAnswers`—Users can add answers to the feed element instead of comments. Users can also select the best answer.

- `Topics`—The logged-in user can add topics to the feed element.

#### `ConnectApi.FeedElementType`

Feed elements are the top-level objects that a feed contains. The feed element type describes the characteristics of that feed element.

- `Bundle`—A container of feed elements. A bundle also has a body made up of message segments that can always be gracefully degraded to text-only values.



**Note:** Bundled posts are available through a pilot program. For information, contact Salesforce.com. During the pilot, bundles contain only feed-tracked changes and are displayed only in record feeds and only in the Salesforce1 mobile browser app.

- `FeedItem`—A feed item has a single parent and is scoped to one community or across all communities. Feed items can have comments, likes, and topics. Depending on the feed item type, a feed item can have an attachment of additional information (a poll, file, dashboard, and so on). Feed items have a body made up of message segments that can always be gracefully degraded to text-only values.

#### `ConnectApi.FeedItemType`

This enum has these new values:

- `AdvancedTextPost`—A text post with advanced formatting, such as a group announcement.
- `ProfileSkillPost`—Feed item generated when a skill is added to a user's profile.

## API

Use the API to create applications that integrate with Salesforce. We've made improvements in API version 31.0.

### *Developer Edition Changes*

Use Developer Edition organizations to develop Force.com applications.

### *New and Changed Objects*

API objects represent database tables that contain your organization's information.

### *REST API*

Use REST API to interact with Force.com data.

### *SOAP API*

Use SOAP API to interact with Force.com data.

### *Chatter REST API*

Use Chatter REST API to integrate mobile apps, intranet sites, and third party Web applications with Chatter.

### *Data.com API*

The Data.com APIs provide access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

### *Bulk API*

Use Bulk API to work with large sets of records.

### *Tooling API*

Use Tooling API to build custom development tools for Salesforce applications.

### **Metadata API**

Use the Metadata API to manage customization information, such as custom object definitions and page layouts, for your organization.

### **Salesforce Console API (Integration Toolkit)**

The toolkit includes new methods that let you customize a console's navigation tab and interaction log programmatically.

### **Open CTI API**

Open CTI includes a new method that lets you retrieve phone numbers from a Salesforce call center's directory.

### **Analytics Dashboards API**

Use the Analytics Dashboards API to integrate Salesforce dashboard data into your applications programmatically.

## **Developer Edition Changes**

Use Developer Edition organizations to develop Force.com applications.

### **Increased API limits**

The maximum number of API requests for a Developer Edition organization has been increased from 5,000 to 15,000.

## **New and Changed Objects**

API objects represent database tables that contain your organization's information.

### **New Objects**

These objects are new in API version 31.0.

### **Changed Objects**

These objects have changed in API version 31.0.

## **New Objects**

These objects are new in API version 31.0.

### **CustomPermission**

Represents a permission created to control access to a custom process or app, such as sending email. Custom permissions are currently available as a developer preview.

### **KnowledgeableUser**

Represents a user identified as knowledgeable about a specific topic, and ranks them relative to other knowledgeable users.

### **MetricsDataFile**

Represents a data file containing usage metrics on all installations of a managed package in a Salesforce instance.

### **ObjectTerritory2AssignmentRule**

Represents a territory assignment rule that's associated with an object, such as Account.

ObjectTerritory2AssignmentRuleItem can only be created or deleted if the BooleanFilter field on its corresponding

ObjectTerritory2AssignmentRule is null. Available only if Territory Management 2.0 has been enabled for your organization.

### ObjectTerritory2AssignmentRuleItem

A single row of selection criteria for an ObjectTerritory2AssignmentRule object. ObjectTerritory2AssignmentRuleItem can only be created or deleted if the BooleanFilter field on its corresponding ObjectTerritory2AssignmentRule object is a null value. Available only if Territory Management 2.0 has been enabled for your organization.

### ObjectTerritory2Association

Represents an association (by assignment) between a territory and an object record, such as an account. Available only if Territory Management 2.0 has been enabled for your organization.

### PackageLicense

Represents a license for an installed managed package.

### ProcessDefinition

Represents the definition of a single approval process.

### ProcessInstanceNode

A process instance node represents an instance of an approval step. A new process instance node is created each time a record enters a step in an approval process. No process instance node is created when the record doesn't meet the step criteria or if the approval process instance is otherwise completed without entering the step. Use this object to retrieve approval history. Compare to ProcessNode, which describes the step in a process definition.



**Note:** After Summer '14 is available for your organization, it may take a few weeks before your organization's approval history data becomes available. During those initial weeks, approval history reports may not return all possible data. Also, some data from previously completed and currently pending approval processes may never be reflected in the approval history. For details, see [Considerations for Approval History Reports](#) on page 212.

### ProcessNode

Describes a step in a process definition. Compare to ProcessInstanceNode, which describes the step in a running process.

### ProfileSkill

Represents a profile skill, which describes a user's professional knowledge. This is a global record for the organization, and users are associated through the ProfileSkillUser object.

### RuleTerritory2Association

Represents a record-assignment rule and its association to an object, such as Account. Available only if Territory Management 2.0 has been enabled for your organization.

### Territory2

Represents a sales territory. Available only if Territory Management 2.0 has been enabled for your organization.

### Territory2Model

Represents a territory model. Available only if Territory Management 2.0 has been enabled for your organization.

### Territory2ModelHistory

Represents the history of changes to the values in the fields on a territory model. Available only if Territory Management 2.0 has been enabled for your organization.

**Territory2Type**

Represents a category for territories (Territory2). Every Territory2 must have a Territory2Type. Available only if Territory Management 2.0 has been enabled for your organization.

**UserConfigTransferButton**

Represents the association between a Live Agent configuration and a live chat button. This association allows users associated with a specific configuration to transfer chats to a button queue.

**UserConfigTransferSkill**

Represents the association between a Live Agent configuration and a skill. This association allows users associated with a specific configuration to transfer chats to agents who have that skill.

**UserPackageLicense**

Represents a license for an installed managed package, assigned to a specific user.

**UserTerritory2Association**

Represents an association (by assignment) between a territory and a user record. Available only if Territory Management 2.0 has been enabled for your organization.

**WorkRewardFundType**

Represents the type of WorkRewardFund object.

**WorkRewardFundTypeHistory**

Represents the history of changes to the values in the fields of a WorkRewardFundType object.

**WorkRewardFundTypeShare**

Represents a sharing entry on a WorkRewardFundType.

## Changed Objects

These objects have changed in API version 31.0.

**Changed Objects That Affect Earlier API Versions**

These objects have changed in API version 31.0 and affect earlier API versions.

**AccountTerritoryAssignmentRuleItem**

The AccountTerritoryAssignmentRuleItem object can now be created or deleted if the BooleanFilter field on its corresponding AccountTerritoryAssignmentRule object is a null value.

**PermissionSet and Profile**

The following user permissions, which were previously available only in the Salesforce user interface, are now available in the API.

- PermissionsActivateContract
- PermissionsActivateOrder
- PermissionsDataExport
- PermissionsDeleteActivatedContract
- PermissionsEditBrandTemplates
- PermissionsEditHtmlTemplates
- PermissionsEditPublicTemplates
- PermissionsEmailMass

- `PermissionsEmailSingle`
- `PermissionsExportReport`
- `PermissionsImportPersonal`
- `PermissionsManageTranslation`



**Note:** Availability of specific permissions depends on the organization edition and user licenses.

### Changed Objects That Don't Affect Earlier API Versions

These objects have changed in API version 31.0 and the changes do not affect earlier API versions.

#### ActivityHistory

The `ActivityHistory` object has the following new field: `IsHighPriority`.

#### Account

The `Account` object has the following new fields. Contact salesforce.com Customer Support to enable these fields.

- `MiddleName` (beta)
- `Suffix` (beta)

#### AttachedContentDocument

The `AttachedContentDocument` object has the following new fields.

- `ContentUrl`
- `FileExtension`

#### BusinessHours

The `BusinessHours` object has the following new field: `BusinessHoursId`.

#### Contact

The `Contact` object has the following new fields. Contact salesforce.com Customer Support to enable these fields.

- `MiddleName` (beta)
- `Suffix` (beta)

#### CollaborationGroupMember

The `CollaborationGroupMember` object has the following new field: `LastFeedAccessDate`.

#### CombinedAttachment

The `CombinedAttachment` object has the following new fields.

- `ContentUrl`
- `FileExtension`

#### ContentDocument

`ContentDocument` now supports the `describeLayout()` call.

The `ContentDocument` object has the following new fields.

- `ContentSize`
- `Description`
- `FileExtension`
- `FileType`

### ContentVersion

The ContentVersion object has the following new field: `FileExtension`.

### ContentVersionHistory

The `Field` field on the ContentVersionHistory object has the following new picklist value: `contentVersionDataReplaced`.

### Event

The following labels were added to the `ClientGuid` field and the `IsClientManaged` field respectively: **Client GUID** and **Is Client Managed**.

The description of the `AccountId` field was expanded to clarify how Salesforce determines the related account on an event.

### FieldHistoryArchive

The FieldHistoryArchive object has the following new field: `FieldHistoryType`.

### Lead

The Lead object has the following new fields. Contact salesforce.com Customer Support to enable these fields.

- `MiddleName` (beta)
- `Suffix` (beta)

### LiveChatUserConfig

The LiveChatUserConfig object has the following new field: `OptionsHasChatTransfer`.

### LoginHistory

The LoginHistory object has the following new field: `NetworkId`.

### Name

The Name object has the following new fields. Contact salesforce.com Customer Support to enable these fields.

- `MiddleName` (beta)
- `Suffix` (beta)

### Network

The Network object has the following new fields:

- `OptionsGuestChatterEnabled`
- `OptionsReputationEnabled`

### OpenActivity

The OpenActivity object has the following new field: `IsHighPriority`.

### Organization

The Organization object has the following new read-only fields.

- `InstanceName`
- `IsSandbox`

### OwnedContentDocument

The OwnedContentDocument object has the following new fields.

- `ContentUrl`
- `FileExtension`

## PricebookEntry

The PricebookEntry object now supports the `describeLayout()` call.

## Process approval history objects



**Note:** After Summer '14 is available for your organization, it may take a few weeks before your organization's approval history data becomes available. During those initial weeks, approval history reports may not return all possible data. Also, some data from previously completed and currently pending approval processes may never be reflected in the approval history. For details, see [Considerations for Approval History Reports](#) on page 212.

The following objects have changed:

- **ProcessInstance**—The following fields were added: `ElapsedTimeInDays`, `ElapsedTimeInHours`, `ElapsedTimeInMinutes`, `LastActorId`, and `ProcessDefinitionId`.
- **ProcessInstanceHistory**—The following fields were added: `ElapsedTimeInDays`, `ElapsedTimeInHours`, and `ElapsedTimeInMinutes`.
- **ProcessInstanceStep**—The following fields were added: `ElapsedTimeInDays`, `ElapsedTimeInHours`, `ElapsedTimeInMinutes`, and `StepNodeId`.
- **ProcessInstanceWorkitem**—The following fields were added: `ElapsedTimeInDays`, `ElapsedTimeInHours`, and `ElapsedTimeInMinutes`.

## SetupEntityAccess

In Developer Edition only, the `SetupEntityType` field now includes the value `CustomPermission`.

## Task

The following field was added: `IsHighPriority`.

The description of the `AccountId` field was expanded to clarify how Salesforce determines the related account on a task.

## New Type field picklist values

The `AdvancedTextPost`, `QuestionPost`, and `ProfileSkillPost` picklist values were added to the `Type` field of the following objects:

- AccountFeed
- AssetFeed
- CampaignFeed
- CaseFeed
- CollaborationGroupFeed
- ContentDocumentFeed
- ContractFeed
- DashboardComponentFeed
- DashboardFeed
- EntitlementFeed
- EventFeed
- FeedItem
- LeadFeed
- OpportunityFeed
- Product2Feed
- ProfileSkillFeed
- ReportFeed
- ServiceContractFeed
- SolutionFeed
- TaskFeed

- TopicFeed
- UserFeed
- WorkCoachingFeed
- WorkGoalFeed
- WorkPerformanceCycleFeed

## User

The User object has the following new fields. Contact salesforce.com Customer Support to enable these fields.

- MiddleName (beta)
- Suffix (beta)

The UserPreferencesDisableCoachingEmail field was removed from the User object.

## UserProfile

The following fields were removed from the UserProfile object.

- UserPreferencesDisableCoachingEmail
- UserPreferencesOptOutOfTouch

## WorkBadgeDefinition

The WorkBadgeDefinition object has the following new fields.

- IsLimitPerUser
- LimitNumber
- LimitStartDate
- NetworkId

## WorkCoaching

The object attribute searchable has changed to true.

## WorkFeedback

The RequestId field's updateable property has changed to false.

## WorkGoal

The WorkGoal object has the following new fields.

- OverallStatus
- Weight

## WorkReward

The WorkReward object has the following new fields.

- RewardFundTypeId
- Value

## WorkRewardFund

The Type field's nillable property has changed to true. Additionally, the WorkRewardFund object has the following new fields.

- IsActive
- RewardFundTypeId

## REST API

Use REST API to interact with Force.com data.

### New Resources

#### Search Suggested Queries (Generally Available)

`vXX.X/search/suggestSearchQueries?q=search string&language=language of query`

Returns a list of suggested searches based on the user's query string text matching searches that other users have performed in Salesforce Knowledge. Provides a way to improve search effectiveness, before the user performs a search.

#### SObject Named Layouts

`vXX.X/objects/Object/describe/namedLayouts/layoutName`

Retrieves information about alternate named layouts for a given object.

#### Tabs

`/vXX.X/tabs/`

Returns a list of all tabs—including Flexible Page tabs—available to the current user, regardless of whether the user has chosen to hide tabs via the All Tabs (+) tab customization feature.

### Changed Resources

#### Process Rules Restriction Removed

The `contextId` in a POST method invocation can now use either a 15-character or 18-character ID.

#### Bulk Fetch Now Available for Compact Layouts

Up to 100 objects can be fetched in one query. For example, to get the primary compact layouts for Account, Contact, and a custom object, the request is:

```
/services/data/v31.0/compactLayouts?q=Account,Contact,CustomObj__c
```

## SOAP API

Use SOAP API to interact with Force.com data.

### New Calls

These calls are new in API version 31.0.

#### `describeAllTabs()`

Returns information about all the tabs—including Flexible Page tabs—available to the logged-in user, regardless of whether the user has chosen to hide tabs in his own user interface via the All Tabs (+) tab customization feature.

#### `describePrimaryCompactLayouts()`

Retrieves metadata about the primary compact layout for each of the specified object types.

### Changed Calls

These calls have changed in API version 31.0.

**describeLayout (), DescribeLayoutResult, and associated types**

We added 15 new fields to DescribeLayoutButton, and the following sub-types to support them:

- `WebLinkPosition`—Represents the window position for a new window opened upon clicking a DescribeLayoutButton
- `WebLinkType`—Represents the content being delivered by the custom button.
- `WebLinkWindowType`—Represents the behavior for a DescribeLayoutButton.

The `editable` field under DescribeLayoutItem has been removed, and its functionality has been replaced with two new DescribeLayoutItem fields:

- `editableForNew`—Indicates whether a new DescribeLayoutItem can be edited when creating a new record (`true`) or not (`false`).
- `editableForUpdate`—Indicates whether an existing DescribeLayoutItem can be edited when editing a record (`true`) or not (`false`).

The following field has been added to the DescribeLayoutSection subtype:

- `tabOrder`—Indicates the tab order for the item in the row.

The following type was added to LayoutComponentType:

- `Canvas`—A canvas component on the page layout.

The following subtype has been added:

- `DescribeLayoutCustomLinkSection`—Custom link(s) associated with the specified custom link section.

Added a new LayoutComponentType, `CustomLink`, and a new subtype to go with it:

- `CustomLinkComponent`—When the LayoutComponentType value is `CustomLink`, this type contains information about a single custom link on the page layout.

Added a new subtype, `FieldLayoutComponent`—Extends the information returned by DescribeLayoutComponent. When the LayoutComponentType value is `Field`, and the field being described is an `Address` or `Person Name` field, `FieldLayoutComponent` includes information about the field's components.

Added a new argument to `describeLayout ()`:

- `layoutName`—The specified value must be a valid named layout for this object. Layout names are obtained from `namedLayoutInfos` in DescribeSObjectResult. The entity name is not valid because the primary layout is not considered “named.”

**describeSObjects () and DescribeSObjectResult**

- The `filteredLookupInfo` field was added to the Field subtype. If the field is a reference field type with a lookup filter, `filteredLookupInfo` contains the lookup filter information for the field. If there is no lookup filter, or the filter is inactive, this field is `null`.
- The `FilteredLookupInfo` subtype was added.
- The `namedLayoutInfos` field was added. The specific named layouts that are available for the objects other than the default layout.
- The `NamedLayoutInfo` subtype was added.

## Chatter REST API

Use Chatter REST API to integrate mobile apps, intranet sites, and third party Web applications with Chatter.



**Note:** To create custom Chatter experiences in Salesforce, use [Chatter in Apex \(ConnectApi\)](#).

## General Updates to Chatter REST API

### New and Changed Resources

### New and Changed Request Bodies

### New and Changed Response Bodies

## General Updates to Chatter REST API

### Documentation indicates whether a resource requires Chatter

Each resource in the *Chatter REST API Developer's Guide* has a section indicating whether or not the resource requires the user making the request to have access to Chatter. To verify that the user has access, check the `hasChatter` property of the User Details or the User Settings response bodies.

### Resource-specific request parameters are ignored when a request includes a request body

When you make a request that includes resource-specific request parameters and a request body, the resource-specific request parameters are ignored. For example, the `originalFeedElementId` parameter in this request is ignored and the request body is processed:

```
POST /chatter/feed-elements?originalFeedElementId=0D5D0000000XZ1c

{
  "body" : {
    "messageSegments" : [
      {
        "type" : "Text",
        "text" : "When should we meet for release planning?"
      },
      {
        "type" : "Mention",
        "id" : "005D00000016Qxp"
      }
    ]
  },
  "feedElementType" : "FeedItem",
  "subjectId" : "0F9D00000000oOd"
}
```

Request parameters that are not specific to a resource are processed along with the request body. Examples are parameters in bearer token URLs and the `_HttpMethod` parameter.

### New bearer token URLs for feed elements

The Feed response body returns bearer token URLs for these new properties:

- `feedElementPostUrl`
- `feedElementsUrl`

To return the Feed response body, make a request to these resources with the request header `X-Connect-Bearer-Urls`: `true`:

- `/chatter/feeds/feedType`
- `/chatter/feeds/feedType/subjectId`
- `/chatter/feeds/filter/subjectId/keyPrefix`



**Note:** Use bearer token URLs as they are. Don't add or remove parameters from a bearer token URL or you'll receive an error.

## New and Changed Resources

### Action Links (Pilot)



**Note:** Action links are available through a pilot program and only in the Salesforce1 mobile browser app. For information on enabling action links in your organization, contact salesforce.com.

An action link is a URL on a feed item that targets an API, a Web page, or a file. An action link can also include an HTTP method and OAuth information. Use action links to integrate Salesforce and third-party systems into the feed.

The highlighted buttons are action links:



For more examples of action links, see [Add Action Links to Posts \(Pilot\)](#) on page 91.

### Create an action link group definition

An action link group is a collection of mutually exclusive action links with shared properties. For example, you can define whether an action link group can be executed once, once per user, or an unlimited number of times per user.

To create an action link group definition, make a POST request to the new `/connect/action-link-group-definitions` resource. Pass the new Action Link Group Definition Input request body which includes Action Link Definition Input request bodies defining each action link.

### Post a feed item that is associated with one or more action link groups

To post a feed item that is associated with one or more action link groups, make a POST request to the new `/chatter/feed-elements` resource. Pass a Feed Item Input request body and specify the action link group IDs in the `capabilities` property.

```
POST /v31.0/chatter/feed-elements

{
  "body": {
    "messageSegments": [
      {
        "type": "Text",
        "text": "Change your pictures"
      }
    ]
  },
  "subjectId": "me",
  "feedElementType": "feedItem",
  "capabilities": {
    "associatedActions": {
      "actionLinkGroupIds": ["0AgRR0000004CIL0A2"]
    }
  }
}
```

The action link group IDs are in the response to the POST request to the `/chatter/action-link-group-definitions` resource.

### Get or delete an action link group definition

To get or delete an action link group definition, use the new `/connect/action-link-group-definitions/actionLinkId` resource.

Deleting an action link group definition removes all references to it from feed items and their parents.

All action links must belong to a group. Action links in a group are mutually exclusive and share some properties. Define stand-alone actions in their own action group. Because information in the action link group definition can be sensitive to a third party (for example, OAuth bearer token headers), only requests made via the connected app that created the action link group definition can read or modify the information.

### Get information about a specific action link group

To get information about a specific action link group, use the new `/connect/action-link-groups/actionLinkId` resource.

### Update the status of an action link or get information

To update the status of an action link, make a PATCH request to the new `/connect/action-links/actionLinkId` resource. Possible status values are:

- `Failed`—The action link execution failed.
- `Pending`—The action link is executing. Choosing this value triggers the API call for `Api` and `ApiAsync` action links.
- `Successful`—The action link executed successfully.

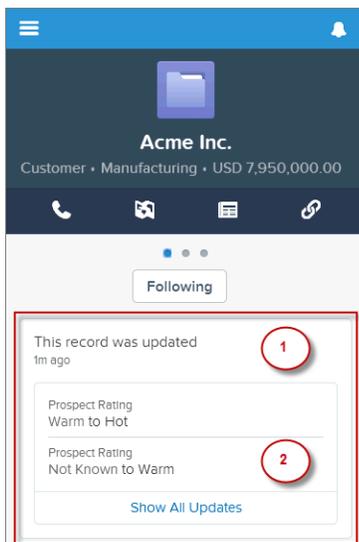
To get information, make a GET request.

## Feed Elements

In API versions 30.0 and earlier, a feed contains feed items. As of API version 31.0, a feed contains *feed elements*.

In API version 31.0, a feed element can be a feed item or a bundle. A *bundle* (or *bundled post*) contains feed elements and keeps the feed clean and organized. In Summer '14, bundles are collections of feed tracked change feed items in record feeds only and are supported in the Salesforce1 mobile browser app only. Bundled posts are available through a pilot program. For information on enabling bundled posts for your organization, contact salesforce.com.

The feed element in this image is a bundle of feed tracked changes for the Acme Inc. account:



1. The header indicating that this bundle contains feed tracked changes for a record.
2. The auxiliary body indicating the changed field and the new and old values.

To see the individual feed tracked change feed items, click on the bundle.

To get bundles, request the new resource `/chatter/feeds/record/recordId/feed-elements`. When you request feed items from a feed (for example, using the resource `/chatter/feeds/news/me/feed-items`), bundles are not returned.

In API versions 30.0 and earlier, every feed item supported comments, likes, topics, and so on. In versions 31.0 and later, every feed item (and feed element) can have a unique set of *capabilities*. If a capability property exists on a feed element, that capability is available, even if the capability property doesn't have a value. For example, if the `ChatterLikes` capability property exists on a feed element (with or without a value), the logged-in user can like that feed element. If the capability property doesn't exist, it isn't possible to like that feed element. A capability can also contain associated data. For example, the `Moderation` capability contains data about moderation flags.

The Feed Item response body and the Bundle response body have new `capabilities` properties, which contain the capabilities of that feed element.



**Tip:** The `feed-items` resources are still supported, but to future-proof your applications, use the new `feed-elements` resources instead. For example, as of API version 31.0, the only feed element types are feed item and bundle, but that could change in future releases.

## Get a feed's feed elements

Make GET requests to these new resources to get the feed elements for a feed. A feed element can be either a feed item or a *bundle*, which is a container of other feed elements

- /chatter/feeds/bookmarks/me/feed-elements
- /chatter/feeds/company/feed-elements
- /chatter/feeds/favorites/me/**favoriteId**/feed-elements
- /chatter/feeds/files/me/feed-elements
- /chatter/feeds/filter/me/**keyPrefix**/feed-elements
- /chatter/feeds/groups/me/feed-elements
- /connect/communities/**communityId**/chatter/feeds/moderation/feed-elements
- /chatter/feeds/news/me/feed-elements
- /chatter/feeds/people/me/feed-elements
- /chatter/feeds/record/**recordId**/feed-elements
- /chatter/feeds/to/me/feed-elements
- /chatter/feeds/topics/**topicId**/feed-elements
- /chatter/feeds/user-profile/**userId**/feed-elements

### Get feed elements in a bundle

To get feed elements in a bundle, make a GET request to the /chatter/feed-elements/**feedElementId**/capabilities/bundle/feed-elements resource.

### Post a feed element and search all feed elements

To post a feed element make a POST request to the /chatter/feed-elements resource. Supply the subjectId as a parameter. You don't need to supply the feed type or the subject ID in the URL path like you did in earlier API versions.

To search all the feed elements in an organization, make a GET request.

### Get information about or delete a feed element

To get information about or delete a specific feed element, use the /chatter/feed-elements/**feedElementId** resource, which supports GET and DELETE.

### Get information about multiple feed elements in one request

To get information about multiple feed elements in one request, make a GET request to the /chatter/feed-elements/batch/**feedElementIds** resource.

### Get a feed element's capability set

To get a feed element's capability set, make a GET request to the /chatter/feed-elements/**feedElementId**/capabilities resource. A capability set includes all the capabilities of a feed element.

### Get a specific capability

To get information about a specific capability, make a GET request to the /chatter/feed-elements/**feedElementId**/capabilities/**capabilityType** resource.

### Get information about the moderation capability, flag a feed element, or delete moderation flags from a feed element

Make a GET request to get information, a POST request to flag a feed element for moderation, or a DELETE request to the /connect/communities/**communityId**/chatter/feed-elements/**feedElementId**/capabilities/moderation resource.

### Salesforce Files Sync (Generally Available)

Chatter REST API for Salesforce Files Sync is generally available in version 31.0. To use Chatter REST API to work with files and folders, use these resources.

**Move a file to a different folder**

Move a file to a different folder using `/chatter/files/fileId`. These request parameters for POST are no longer reserved for pilot:

- `isDataSync`—The request is automatically generated by an automated client.
- `isInMyFileSync`—`true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.

These request parameters for PATCH are no longer reserved for pilot:

- `isInMyFileSync`—`true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.
- `parentFolderId`—ID of the containing folder.

**Get information about folder, modify, or delete a folder**

To get information about a folder, modify or delete a folder, use `/chatter/folders/folderId`.

**Get information about the contents of a folder and add items to a folder**

To get information about the contents of a folder and add items to a folder, use `/chatter/folders/folderId/items`.

**Work with users files**

These POST parameters for the `/chatter/users/me/files/` resource are no longer reserved for pilot:

- `isDataSync`—The request is automatically generated by an automated client.
- `isInMyFileSync`—`true` if the file is included in the user's Salesforce Files folder, and is synced between that folder and Chatter; `false` otherwise.

**Other Changes to Chatter REST API Resources****Post a major or minor version of a file**

To post a new major or minor version of a file, use either the `/chatter/files/fileId` resource or the `/chatter/users/userId/files` resource, both of which support POST. Major versions can't be replaced.

**Get renditions of a file for preview**

To create a rendition of a file for previewing the file's content, use the `/chatter/files/fileId/rendition` resource, which supports GET.

For shared files, renditions process asynchronously after upload. For private files, renditions process when the first file preview is requested, and aren't available immediately after the file is uploaded.

**Post an announcement to a group**

To post an announcement to a group, use the new `/chatter/groups/groupId/announcements` resource, which supports GET and POST.

You can also use this resource to get information about all announcements in a group.

An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

**Update, get, or delete a group's announcement**

To update an announcement, pass the `expirationDate` parameter in a PATCH request to the new `/chatter/announcements/announcementId` resource.

To get an announcement, make a GET request. To delete an announcement, make a DELETE request.

**Send push notifications**

To send mobile push notifications, use the new `/connect/notifications/push` resource, which supports POST.

Send a mobile push notification to connected apps on users' devices. This resource is only accessible when the session is established with a connected app that is developed in the same organization or installed in the same package as the recipient's connected app.

### Filter topic endorsements

Use the new `endorseeId` and `endorserId` parameters in GET requests to the Topics, Endorse People resource (`/connect/topics/topicId/endorsements`) to filter topic endorsements for or from a specific user.

### Chatter Questions (Beta)



**Note:** This release contains a beta version of Chatter Questions that is production quality but has known limitations. For information on enabling this feature for your organization, contact [salesforce.com](https://salesforce.com).

To use Chatter REST API to work with Chatter Questions, use these resources.

- To post a question, make a POST request to the `/chatter/feeds/news/userId/feed-items` resource using the Attachment Input: Question request body.
- To get the best answer of a question feed item, make a GET request to the new `/chatter/feed-items/feedItemId/question` resource.
- To update the best answer for a question, make a PATCH request to `/chatter/feed-items/feedItemId/question` and pass the `bestAnswerId` parameter or a Feed Question Input request body.
- To search for question and answers suggestions, make a GET request to the new `/connect/question-and-answers/suggestions` resource.

## New and Changed Request Bodies

### Action Link Definition Input

This new request body is the definition of an action link.

The request body has these properties:

- `actionType`—Defines the type of action link. One of these values:
  - ◊ `Api`—The action link calls a synchronous API.
  - ◊ `ApiAsync`—The action link calls an asynchronous API.
  - ◊ `Download`—The action link downloads a file.
  - ◊ `Ui`—The action link takes the user to a user interface.
- `actionUrl`—The action link URL. For example, for a `Ui` action link, the URL may be a Web page. For an `Api` or `ApiAsync` action link, the URL may be a REST resource. For a `Download` action link, the URL is a link to the file to download. Links to Salesforce can be relative. All other links must be absolute and start with `https://`.
- `excludedUserId`—ID of a single user to exclude from performing the action.
- `groupDefault`—`true` if this action is the default or primary action link in the action link group; `false` otherwise. There can be only one default action link per action link group.
- `headers`—The request headers for the `Api` and `ApiAsync` action link types.
- `labelKey`—Key for the set of labels to show in the user interface. A set includes labels for these states: new, pending, success, failed. For example, if you use the `Approve` key, you get these labels: Approve, Pending, Approved, Failed.
- `method`—One of these HTTP methods:
  - ◊ `Delete`—Return HTTP 204 on success. Response body is empty.
  - ◊ `Get`—Return HTTP 200 on success.
  - ◊ `Head`—Return HTTP 200 on success. Response body is empty.
  - ◊ `Patch`—Return HTTP 200 on success or HTTP 204 if the response body is empty.

- ◊ `Post`—Return HTTP 201 on success or HTTP 204 if the response body is empty.
- ◊ `Put`—Return HTTP 200 on success or HTTP 204 if the response body is empty.
- `requestBody`—The request body for `Api` and `ApiAsync` action link types.
- `requiresConfirmation`—`true` if the action results in something that should be confirmed, such as a delete; `false` otherwise.
- `userId`—The ID of the user who can execute the action. If not specified or `null`, any user can execute the action.

### Action Link Group Definition Input

This new request body is the definition of an action link group.

The request body has these properties:

- `actionLinks`—A collection of Action Link Definition Input request bodies which are the action links in the group.
- `category`—Indicates the priority and relative locations of action links. One of these values:
  - ◊ `Primary`—The action link is displayed in the feed item’s auxiliary body.
  - ◊ `Unclassified`—The action link is displayed in the drop-down menu at the top right corner of the feed item.
- `executionsAllowed`—Defines the number of times an action link can be executed. One of these values:
  - ◊ `Once`—An action link can be executed only once across all users.
  - ◊ `OncePerUser`—An action link can be executed only once for each user.
  - ◊ `Unlimited`—An action link can be executed an unlimited number of times by each user. You can’t use this value if the action link’s `actionType` is `Api` or `ApiAsync`.
- `expirationDate`—ISO 8601 date string, for example, `2011-02-25T18:24:31.000Z`, that represents the date and time this action group expires and can no longer be executed. The `expirationDate` must be within one year of the creation date.

### Action Link Input

This new request body describes an action link. It has one property, `status`, which is the execution status of the action. One of these values:

- `Failed`—The action link execution failed.
- `Pending`—The action link is executing. Choosing this value triggers the API call for `Api` and `ApiAsync` action links.
- `Successful`—The action link executed successfully.

### Announcement Input

This new request body describes an announcement. An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it’s deleted or replaced by another announcement.

This request body has these properties:

- `body`—Text of the announcement.
- `expirationDate`—The Salesforce UI displays an announcement until 11:59 p.m. on this date unless another announcement is posted first. The Salesforce UI ignores the time value in the `expirationDate`. However, you can use the time value to create your own display logic in your own UI.

### Associated Actions Capability Input

This new request body describes action links that can be created or updated on a feed element.

It has one property, `actionLinkGroupIds`, which is a collection of action link group IDs to associate with the feed element.

### Attachment Input: Question (Beta)

This request body describes a question attachment to a feed item.

It has these properties:

- `attachmentType`—The attachment type. Must contain the value `Question`.
- `questionTitle`—Title of the question.

### Feed Element Capabilities Input

This new request body is a container for capabilities that can be included with a feed element. Capabilities define how a feed element behaves.

It has one property, `associatedActions`, which is an Associated Actions Capability Input request body.

### Feed Item Input

Feed items are now a type of feed element.

This request body has these new properties:

- `capabilities`—A Feed Element Capabilities Input request body. The capabilities that define the behavior of the feed element. In API versions 30.0 and earlier, every feed item supported comments, likes, topics, and so on. In versions 31.0 and later, every feed item (and feed element) can have a unique set of *capabilities*. If a capability property exists on a feed element, that capability is available, even if the capability property doesn't have a value. For example, if the `ChatterLikes` capability property exists on a feed element (with or without a value), the logged-in user can like that feed element. If the capability property doesn't exist, it isn't possible to like that feed element. A capability can also contain associated data. For example, the `Moderation` capability contains data about moderation flags.
- `feedElementType`—The type of feed element this input represents. The only possible value is `FeedItem`.
- `originalFeedElementId`—If this feed element is shared, this is the original feed element. Feed elements are the top-level items that a feed contains. Feeds are feed element containers.
- `subjectId`—The ID of the parent this feed element is being posted to. This value can be the ID of a user, group, or record, or the string `me` to indicate the logged-in user.

The `attachment` property of this request body supports the Attachment Input: Question request body.

### Feed Question Input (Beta)

This new request body describes a feed question.

### File Input

This request body has a new `isMajorVersion` property, which is `true` if the file is a major version; `false` if the file is a minor version. Major versions can't be replaced.

### Group Input

This request body has a new `announcement` property, which is an announcement ID.

### Push Notification Input

This new request body describes a push notification.

The request body has these properties:

- `appName`—The API name of the connected app that the push notification is sent to.
- `namespace`—The namespace of the connected app that the push notification is sent to.
- `payload`—The push notification payload in JSON format.
- `userIds`—The push notification recipient user ids.

### Request Header Input

This new request body is an HTTP request header name and value pair.

- `name`—The name of the request header.
- `value`—The value of the request header.

## New and Changed Response Bodies

### Action Link

An action link instance with state information for the logged-in user.

This new response body has these properties:

- `actionLinkGroup`—A reference to the action link group containing this action link.
- `actionUrl`—The action link URL. For an `Api` or `ApiAsync` action link, this value is `null`. For a `Ui` action link, the URL may be a Web page. For a `Download` action link, the URL is a link to the downloadable file.
- `confirmationMessage`—If `requiresConfirmation` is `true`, this is the default localized confirmation message. If `requiresConfirmation` is `false`, this is `null`.
- `createdDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `diagnosticInfo`—Diagnostic information, such as HTTP status codes and error messages, received from `Api` and `ApiAsync` calls.
- `executingUser`—User who initiated execution of the action link.
- `groupDefault`—`true` if this action is the default or primary action link in the action link group; `false` otherwise. There can be only one default action link per action link group.
- `id`—The ID of the action link. The 18-character ID of the action link definition.
- `label`—The localized label for the action link.
- `modifiedDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `quickActionInfo`—Reserved for future use
- `requiresConfirmation`—`true` if the action results in something that should be confirmed, such as a delete; `false` otherwise.
- `status`—One of these values:
  - ◊ `Failed`—The action link execution failed.
  - ◊ `New`—The action link is ready to be executed.
  - ◊ `Pending`—The action link is executing.
  - ◊ `Successful`—The action link executed successfully.
- `type`—One of these values:
  - ◊ `Api`—The action link calls a synchronous API.
  - ◊ `ApiAsync`—The action link calls an asynchronous API.
  - ◊ `Download`—The action link downloads a file.
  - ◊ `Ui`—The action link takes the user to a user interface.
- `url`—Chatter REST API URL for the Action Link.

### Action Link Definition

This new response body is the definition of an action link. To access this information, request must use the same connected app that was used to create the action link definition.

It has these properties:

- `actionUrl`—The action link URL. For example, for a `Ui` action link, the URL may be a Web page. For an `Api` or `ApiAsync` action link, the URL may be a REST resource. For a `Download` action link, the URL is a link to the file to download. Links to Salesforce can be relative. All other links must be absolute and start with `https://`.
- `createdDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `excludedUserId`—ID of a single user to exclude from performing the action.

- `groupDefault`—`true` if this action is the default or primary action link in the action link group; `false` otherwise. There can be only one default action link per action link group.
- `headers`—The request headers for the `Api` and `ApiAsync` action link types.
- `id`—ID for the action link definition.
- `labelKey`—Key for the set of labels to show in the user interface. A set includes labels for these states: `new`, `pending`, `success`, `failed`. For example, if you use the `Approve` key, you get these labels: `Approve`, `Pending`, `Approved`, `Failed`.
- `method`—One of these HTTP methods:
  - ◊ `Delete`—Return HTTP 204 on success. Response body is empty.
  - ◊ `Get`—Return HTTP 200 on success.
  - ◊ `Head`—Return HTTP 200 on success. Response body is empty.
  - ◊ `Patch`—Return HTTP 200 on success or HTTP 204 if the response body is empty.
  - ◊ `Post`—Return HTTP 201 on success or HTTP 204 if the response body is empty.
  - ◊ `Put`—Return HTTP 200 on success or HTTP 204 if the response body is empty.
- `modifiedDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `requestBody`—The request body for `Api` and `ApiAsync` action link types.
- `requiresConfirmation`—`true` if the action results in something that should be confirmed, such as a delete; `false` otherwise.
- `type`—Defines the type of action link.
- `userId`—The ID of the user who can execute the action. If not specified or `null`, any user can execute the action.

### Action Link Group

This new response body represents an action link group instance with state appropriate for the logged-in user.

It has these properties:

- `actionLinks`—A collection of Action Link response bodies, which are the action link instances for this group.
- `category`—Indicates the priority and relative locations of action links.
- `createdDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `executionsAllowed`—Defines the number of times an action link can be executed.
- `expirationDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`. After this date, action links in the action link group can't be executed. If this value is `null`, there isn't an expiration date.
- `id`—ID for the action link group.
- `modifiedDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `url`—Chatter REST API URL for the Action Link Group.

### Action Link Group Definition

The definition of an action link group. All action links must belong to a group. Action links in a group are mutually exclusive and share some properties. Define stand-alone actions in their own action group. Because information in the action link group definition can be sensitive to a third party (for example, OAuth bearer token headers), only requests made via the connected app that created the action link group definition can read or modify the information.

This new response body has these properties:

- `actionLinks`—A collection of Action Link Definition response bodies that make up the action link group.
- `category`—Indicates the priority and relative locations of action links. One of these values:
  - ◊ `Primary`—The action link is displayed in the feed item's auxiliary body.
  - ◊ `Unclassified`—The action link is displayed in the drop-down menu at the top right corner of the feed item.
- `createdDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `executionsAllowed`—One of these values:
  - ◊ `Once`—An action link can be executed only once across all users.

- ◇ `OncePerUser`—An action link can be executed only once for each user.
- ◇ `Unlimited`—An action link can be executed an unlimited number of times by each user. You can't use this value if the action link's `actionType` is `Api` or `ApiAsync`.
- `expirationDate`—ISO 8601 date string, for example, `2011-02-25T18:24:31.000Z`, that represents the date and time this action group expires and can no longer be executed. If the value is `null`, there isn't an expiration date.
- `id`—18-character ID of the Action Link Group Definition.
- `modifiedDate`—An ISO 8601 format date string, for example, `2011-02-25T18:24:31.000Z`.
- `url`—Chatter REST API URL for the Action Link Group Definition.

### Announcement

This new response body is an announcement. An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

It has these properties:

- `expirationDate`—The Salesforce UI displays an announcement until 11:59 p.m. on this date unless another announcement is posted first. The Salesforce UI ignores the time value in the `expirationDate`. However, you can use the time value to create your own display logic in your own UI.
- `feedElement`—The feed element that contains the body of the announcement and its associated comments, likes, and so on.
- `id`—18-character ID of the announcement.

### Announcement Page

This new response body is a paged collection of Announcement response bodies.

It has these properties:

- `announcements`—A collection of announcements.
- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page or `null` if there isn't a previous page.

### Article Item

This new response body is an article in question and answer search results. It has these properties:

- `id`—ID of the article.
- `rating`—Rating of the article.
- `title`—Title of the article.
- `urlLink`—Link URL of the article.
- `viewCount`—Number of votes given to the article.

### Associated Actions Capability

This new response body is information about the action links that can be used on feed elements. It has one property:

- `actionLinkGroups`—A collection of action link groups associated with a feed element capability.

### Banner Capability

If this feed element has this capability, it has a banner motif and style.

This new response body has these properties:

- `motif`—A Motif response body containing a banner motif.
- `style`—Decorates a feed item with a color and set of icons. The value is:

- ◇ **Announcement**—An announcement displays in a designated location in the Salesforce UI until 11:59 p.m. on its expiration date, unless it's deleted or replaced by another announcement.

### Bookmarks Capability

If a feed element has this capability, the logged-in user can bookmark it.

This new response body doesn't have any properties.

### Bundle

Bundle is a new response body. A *bundle* is a feed element that is a container of feed elements.

This response body contains these properties:

- **body**—Information about the bundle.
- **capabilities**—A container for all capabilities that can be included with a feed element.
- **bundleType**—Specifies the type of bundle. One of these values:
  - ◇ **GenericBundle**—A bundle that contains no additional information and is just a collection of feed elements.
  - ◇ **TrackedChanges**—A bundle that represents a collection of feed tracked changes. The bundle includes summary information about the feed tracked changes that make up the bundle.
- **createdDate**—The date and time at which the bundle was created. An ISO 8601 format date string, for example, 2011-02-25T18:24:31.000Z.
- **feedElementType**—Bundles are a type of feed elements. The value of this property is `Bundle`.
- **header**—The header is the title of the post. This property contains renderable plain text for all the segments of the message. If a client doesn't know how to render a feed element type, it should render this text.
- **id**—The 18-character ID of the feed element.
- **modifiedDate**—The date and time at which the bundle was last modified. An ISO 8601 format date string, for example, 2011-02-25T18:24:31.000Z.
- **parent**—The parent type. One of these values:
  - ◇ **File Summary**
  - ◇ **Group**
  - ◇ **Record Summary**
  - ◇ **User Summary**
- **relativeCreatedDate**—The created date formatted as a relative, localized string, for example, "17m ago" or "Yesterday."
- **url**—URL for this bundle.

### Chatter Likes Capability

If a feed element has this capability, the logged-in user can like it and unlike it.

This new response body doesn't have any properties.

### Comments Capability

If a feed element has this capability, the logged-in user can add a comment.

This new response body doesn't have any properties.

### Community

This response body has these new properties:

- **allowChatterAccessWithoutLogin**—Specifies if guest users can access public groups in the community without logging in.
- **reputationEnabled**—Specifies whether reputation is calculated and displayed for members of the community.

## Features

This response body has a new `communitiesEnabled` property which specifies whether Salesforce Communities is enabled.

## Feed

This response body has these new properties:

- `feedElementPostUrl`—URL for posting feed elements to this subject. When returned by a request that includes the HTTP header `X-Connect-Bearer-Urls: true`, the URL includes a bearer token. Use this bearer token URL to make POST requests.
- `feedElementsUrl`—URL to a resource of feed elements.

## Feed Directory Item

This response body has a new `feedElementsUrl` property which is a URL to the resource for the feed elements for a specific feed. For example, `/chatter/feeds/files/me/feed-elements`.

## Feed Element Capabilities

A container for all capabilities that can be included with a feed element.

This new class has these properties:

- `associatedActions`—If a feed element has this capability, it has action links associated with it.
- `banner`—If this feed element has this capability, it has a banner motif and style.
- `bookmarks`—If a feed element has this capability, the logged-in user can bookmark it.
- `bundle`—If a feed element has this capability, the feed element may be a group of other feed elements condensed into one.
- `chatterLikes`—If a feed element has this capability, the logged-in user can like it and unlike it.
- `comments`—If a feed element has this capability, the logged-in user can add a comment.
- `moderation`—If a feed element has this capability, users in the community can flag the feed element for moderation. This response body also includes information about the flagged content.
- `poll`—If a feed element has this capability, the feed element can include a poll for voting.
- `questionAndAnswers`—If a feed element has this capability, users can provide answers instead of comments.
- `topics`—If a feed element has this capability, the logged-in user can add topics to the feed element.

## Feed Element Page

Container of feed elements with paginated results.

This new response body has these properties:

- `currentPageUrl`—Chatter REST API URL identifying the current page.
- `elements`—Collection of feed elements. Feed elements are either bundles or feed items.
- `isModifiedToken`—An opaque polling token that describes when a news feed was last modified. Use this as the value in the `since` request parameter of the `/chatter/feeds/news/me/feed-elements/is-modified` resource.
- `isModifiedUrl`—A Chatter REST API URL with a `since` request parameter that contains an opaque token that describes when the feed was last modified. Returns `null` if the feed isn't a news feed. Use this URL to poll a news feed for updates.
- `nextPageToken`—Token identifying the next page or `null` if there isn't a next page.
- `nextPageUrl`—Chatter REST API URL identifying the next page or `null` if there isn't a next page.
- `updatesToken`—Token to use in an `updatedSince` parameter, or `null` if not available. An opaque polling token that describes when a news feed was last modified. Use this as the value in the `updatedSince` request parameter of the `/chatter/feeds/news/me/feed-elements` resource.
- `updatesUrl`—A Chatter REST API feed resource containing the feed elements that have been updated since the feed was refreshed. If the feed doesn't support this feature, the value is `null`.

## Feed Item

This class has these new properties:

- `capabilities`—In API versions 30.0 and earlier, every feed item supported comments, likes, topics, and so on. In versions 31.0 and later, every feed item (and feed element) can have a unique set of *capabilities*. If a capability property exists on a feed element, that capability is available, even if the capability property doesn't have a value. For example, if the `ChatterLikes` capability property exists on a feed element (with or without a value), the logged-in user can like that feed element. If the capability property doesn't exist, it isn't possible to like that feed element. A capability can also contain associated data. For example, the `Moderation` capability contains data about moderation flags.
- `feedElementType`—Feed elements are the top-level objects that a feed contains. The feed element type describes the characteristics of that feed element. One of these values:
  - ◇ `Bundle`—A container of feed elements. A bundle also has a body made up of message segments that can always be gracefully degraded to text-only values.
 

**Note:** Bundled posts are available through a pilot program. For information, contact Salesforce.com. During the pilot, bundles contain only feed-tracked changes and are displayed only in record feeds and only in the Salesforce1 mobile browser app.
  - ◇ `FeedItem`—A feed item has a single parent and is scoped to one community or across all communities. Feed items can have comments, likes, and topics. Depending on the feed item type, a feed item can have an attachment of additional information (a poll, file, dashboard, and so on). Feed items have a body made up of message segments that can always be gracefully degraded to text-only values.
- `header`—The header is the title of the post. This property contains renderable plain text for all the segments of the message. If a client doesn't know how to render a feed element type, it should render this text.

The `moderationFlags` property is not supported in API versions 31.0 and later. Access moderation flags in the `/capabilities/moderation` property.

The `preamble` property is not supported in API versions 31.0 and later. Use the `header` property instead.

The `attachment` property has a new value, `Question` which is a Feed Item Attachment: Question response body.

The `type` property has these new values:

- `AdvancedTextPost`—A text post with advanced formatting, such as a group announcement.
- `ProfileSkillPost`—Feed item generated when a skill is added to a user's profile.
- `QuestionPost`—Feed item generated when a question is asked.

### Feed Item Attachment: Content

This class has one new property, `contentUrl`, which specifies the URL if the content is a link or a Google Doc; otherwise, the value is `null`.

### Feed Item Attachment: Question

This new response body describes a question attachment and has these properties:

- `bestAnswer`—The comment selected as the best answer for the question.
- `bestAnswerSelectedBy`—Indicates who selected the best answer for the question.
- `canCurrentUserSelectOrRemoveBestAnswer`—Indicates whether the current user can select or remove a best answer.
- `questionTitle`—Title of the question.
- `type`—`Question`

**File Detail**

This class has one new property, `isMajorVersion`, which is `true` if the file is a major version; `false` if the file is a minor version. Major versions can't be replaced.

**File Summary**

This class has one new property, `isMajorVersion`, which is `true` if the file is a major version; `false` if the file is a minor version. Major versions can't be replaced.

**Generic Bundle Capability**

If a feed element has this capability, the feed element may be a group of other feed elements condensed into one.

This new class has these properties:

- `bundleType`—Specifies the type of bundle. The value is `GenericBundle`.
- `feedElements`—A collection of feed elements.
- `totalElements`—The total number of feed elements that this bundle aggregates.

**Group**

This response body has these new properties:

- `announcement`—The current announcement for the group
- `lastFeedElementPostDate`—Date of the most recent feed element posted to the group

The `lastFeedItemPostDate` property is not supported in API versions 31.0 and later. Use `lastFeedElementPostDate`.

**Group Detail**

This response body has these new properties:

- `announcement`—The current announcement for the group
- `lastFeedElementPostDate`—Date of the most recent feed element posted to the group

The `lastFeedItemPostDate` property is not supported in API versions 31.0 and later. Use `lastFeedElementPostDate`.

**Group Member**

This response body has a new `lastFeedAccessDate` property, which is the date on which the group member last accessed the group feed.

**Moderation Capability**

If a feed element has this capability, users in the community can flag the feed element for moderation. This response body also includes information about the flagged content.

This new response body has one property:

- `moderationFlags`—A Moderation Flags response body with information about the flagged feed elements.

**Poll Capability**

If a feed element has this capability, the feed element can include a poll for voting.

This new response body doesn't have any properties.

**Question and Answers Capability**

If a feed element has this capability, users can provide answers instead of comments.

This new response body doesn't have any properties.

### Question and Answers Suggestion Collection

This new response body is a question and answers search result and has these properties:

- `articles`—Collection of articles.
- `questions`—Collection of questions and answers.

### Request Header

This new response body is an HTTP request header name and value pair. It has these properties:

- `name`—The name of the request header.
- `value`—The value of the request header.

### Topics Capability

If a feed element has this capability, the logged-in user can add topics to the feed element.

This new response body doesn't have any properties.

### Tracked Change Bundle Capability

If a feed element has this capability, the feed element may be a group of feed elements condensed into one feed element called a *bundle*. A tracked change bundle contains feed elements that describe tracked changes.

- `bundleType`—Specifies the type of bundle. The value is `TrackedChanges`.
- `changes`—A collection of Tracked Change Item response bodies containing information about the tracked changes.
- `feedElements`—A collection of feed elements.
- `totalElements`—The total number of feed elements that this bundle aggregates.

### User Detail

This response body has one new property, `hasChatter`, which is true if the user has access to Chatter.

### User Settings

This response body has one new property, `hasChatter`, which is true if the user has access to Chatter.

## Data.com API

The Data.com APIs provide access to the most up-to-date Data.com records. You can search, match, and purchase company and contact records.

Available in: **Developer**, **Professional** (add-on), **Enterprise**, and **Performance** Editions.

In this release the Data.com Search API has additional fields and enhancements in the `DatacloudContact`, `DatacloudCompany`, and `DatacloudDandBCompany` objects.

### Datacloud Objects

The Datacloud Objects are used with SOQL to search for Data.com contact and company records and enable you to purchase Data.com records. The following Datacloud Objects have changes in this release.

#### More DatacloudCompany searchable fields

- `DunsNumber`:

A randomly generated nine-digit number that's assigned by Dun & Bradstreet (D&B) to identify unique business establishments.

### More DatacloudDandBCompany searchable fields

- **DunsNumber:** The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&B database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking.
- **GlobalUltimateDunsNumber:** The D-U-N-S Number of the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries. Maximum size is 9 characters. Information for all companies under the Global Ultimate DUNS Number is returned. A corporate structure can be derived from this information.

### DatacloudContact and DatacloudCompany enhancements

Count ()

You can see how many records a query can return by using `Count ()` in the `SELECT` clause of a query. You can also use `Count ()` to determine the number of rows that are returned by a query.

### DatacloudContact read-only fields

UpdatedDate

The last date and time when the information for a contact was updated.

### DatacloudCompany read-only fields

- **ActiveContacts:**  
The number of active contacts that are associated with a company.
- **UpdatedDate:**  
The last date and time when the information for this company was updated.

### DatacloudCompany wildcard search enhancements

Field	Operator Description
NaicsCode	<ul style="list-style-type: none"> <li>• <b>=</b> : an exact search on the value that was entered. The NaicsCode is a string and must be enclosed in single quotation marks.  <code>WHERE NaicsCode = '813940'</code></li> <li>• <b>IN</b> : searches on a string that must be enclosed in single quotation marks nested in parentheses. You can search on a comma separated list.  <code>WHERE NaicsCode IN ('813940', '453998', '524128')</code></li> <li>• <b>LIKE</b> : you can search one or more NaicsCodes with or without a wildcard.  <code>WHERE NaicsCode LIKE '813940,445110'</code></li> </ul>

Field	Operator Description
	<p>The following query finds <code>NaicsCodes</code> that starts with 81 and any value for the third and fifth digits.</p> <pre>WHERE NaicsCode LIKE '81%9%0'</pre> <p>This following query finds any <code>NaicsCode</code> that starts with 445.</p> <pre>WHERE NaicsCode LIKE '445%'</pre> <p> <b>Important:</b> A wildcard should not be used as the first digit. If you use a wildcard as the first digit, the response is empty.</p>
Sic	<ul style="list-style-type: none"> <li>• <code>=</code> : an exact match for a string of numbers. It must be enclosed in single quotation marks. You can search on only one string at a time.</li> <li>• <code>IN</code> : and exact match for a string of numbers. It must be enclosed in single quotation marks and nested in parentheses. It can be a comma separated list.</li> </ul> <pre>WHERE City = 'Chicago' AND Sic IN ('6411', '8651')</pre> <ul style="list-style-type: none"> <li>• <code>LIKE</code> : you can search one or more <code>Sic</code> numbers with or without a wildcard.</li> </ul> <pre>WHERE Sic LIKE '7513,5411'</pre> <p>The following query finds numbers that start with 5, the third digit must be 1, and the second and fourth digits can be any digit.</p> <pre>WHERE Sic LIKE '5%1%'</pre> <p>The following query finds numbers that start with 7 and end with 1.</p> <pre>WHERE Sic LIKE '7%1'</pre> <p> <b>Important:</b> Do not use a wildcard as the first digit. If you use a wildcard as the first digit, the response is empty.</p>

## Bulk API

Use Bulk API to work with large sets of records.

### Bulk Query SOQL Limit Increased

The maximum length for the SOQL query string in a bulk query request has been increased from 10,000 characters to 20,000 characters.

## Tooling API

Use Tooling API to build custom development tools for Salesforce applications.

In version 31.0, Tooling API includes:

### New FlexiPage Object

Represents a Flexible Page. A Flexible Page is the home page for an app that appears as a menu item in the Salesforce1 navigation menu. Includes access to the associated FlexiPage object in the Salesforce Metadata API.

### Renamed HistoryRetentionJob Object

Renamed and updated version of the previous FieldHistoryRetentionJob object. Currently available through a pilot program.

### New DeployDetails Field on ContainerAsyncRequest

The DeployDetails field replaces the CompilerErrors field, and contains the line number, component name and a short description for any compile errors reported in the asynchronous request defined by a ContainerAsyncRequest object.

### Added FullName Field to ContainerMember Objects

The FullName field was added to the following objects: ApexClassMember, ApexComponentMember, ApexPageMember, ApexTriggerMember. This field is the full name of the associated object in the Metadata API, used to avoid race conditions on create, before you have IDs.

## Metadata API

Use the Metadata API to manage customization information, such as custom object definitions and page layouts, for your organization.

### **Metadata API Calls**

Metadata API calls were modified or added in version 31.0.

### **Metadata Types and Fields**

Metadata types and fields were modified or added in version 31.0.

## Metadata API Calls

Metadata API calls were modified or added in version 31.0.

## New Metadata Calls

The following Metadata API call is new.

### `upsertMetadata()`

Creates or updates one or more metadata components in your organization synchronously.

Use the `upsertMetadata()` call to create or update any component that extends Metadata. All components must be of the same type in the same call. For more details, see [Metadata Components and Types](#).

If the specified components already exist in your organization, the `upsertMetadata()` call updates them. Otherwise, `upsertMetadata()` creates these components. Components are matched by the `fullname` field. This call executes synchronously, which means that the call returns only after the operation is completed.

## Updated Metadata Calls

The following Metadata API calls changed.

### Modified Process for `retrieve()`

In API version 31.0 and later, the process of making a `retrieve()` call has been simplified. You no longer have to call `checkStatus()` after a `retrieve()` call to obtain the status of the retrieve operation. Instead, make calls to `checkRetrieveStatus()` only. If the retrieve operation is in progress, call `checkRetrieveStatus()` again until the retrieve operation is completed. The `checkStatus()` call is still supported in versions API version 30.0 or earlier, but is not available in API version 31.0 and later. As part of this change, `RetrieveResult` has new fields that contain status and error information about the retrieval. See [RetrieveResult](#).

### API Version in `package.xml` Used in `retrieve()` Calls

Starting in API version 31.0, `retrieve()` calls use the API version that's specified in `package.xml`. The API version in `package.xml` overrides the version that's specified in the `RetrieveRequest` parameter. If the version is not specified in `package.xml`, the version that's specified in the `apiVersion` field of the `RetrieveRequest` parameter is used.

This change enables you to retrieve components in any API version by updating the version in your `package.xml` file. You no longer need to change the endpoint in your API client or download a new version of the Force.com Migration Tool to make a retrieval with a new API version.

## Deprecated Metadata Calls

The following Metadata API calls have been removed and are no longer available as of API version 31.0. These Metadata API calls are available only in earlier versions.

- `create()`
- `update()`
- `delete()`
- `checkStatus()`

Instead of `create()`, `update()`, and `delete()`, use these synchronous CRUD calls, which were introduced in API version 30.0: `createMetadata()`, `updateMetadata()`, `renameMetadata()`, and `deleteMetadata()`.

For metadata retrieve calls, use `checkRetrieveStatus()` instead of `checkStatus()` to obtain status information about the retrieval. See [Modified Process for `retrieve\(\)`](#).

## Metadata Types and Fields

Metadata types and fields were modified or added in version 31.0.

## Standard Field Support

Standard fields are now supported in Metadata API. You can retrieve, deploy, and perform CRUD (create, read, update, delete) operations on standard fields of standard objects. Standard field support enables you to work with customizations of standard fields, such as help text, feed tracking, and Chatter feed tracking. Only standard fields that can have these customizations are supported. Other standard fields, including system fields (for example, `CreatedById` or `LastModifiedDate`) and autonumber fields, aren't supported.

When you retrieve a standard object via the `CustomObject` type, all the object's customizable standard fields are included in the object definition. Alternatively, you can specify the fields to retrieve via the `CustomField` type by using the **`objectName.field`** syntax in the manifest file. For example, the following example shows a section of the manifest `package.xml` file that retrieves only the `Phone` account field definition.

```
<types>
  <members>Account.Phone</members>
  <name>CustomField</name>
</types>
```

The following sample definition shows the `Phone` Account standard field with history tracking enabled.

```
<?xml version="1.0" encoding="UTF-8"?>
<CustomObject xmlns="http://soap.sforce.com/2006/04/metadata">
  <fields>
    <fullName>Phone</fullName>
    <trackHistory>true</trackHistory>
  </fields>
</CustomObject>
```

## Standard Console App Support

Standard console apps are now supported through the `CustomApplication` type. You can retrieve, deploy, and perform CRUD (create, read, update, delete) operations on standard console apps.

In API version 30.0, standard app support was added, but standard console apps were not included. They are supported now.

## New Metadata Types

### CustomPermission

Represents a permission that grants access to a custom feature. Custom permissions are currently available as a Developer Preview.

### NameSettings

Enables or disables middle name and suffix attributes for the following person objects: Contact, Lead, Person Account, and User. In API version 31.0, `NameSettings` is a beta release type.

## Updated Metadata Types and Fields

These metadata fields have been added or changed in API version 31.0.

### AsyncResult

All fields, with the exception of the `id` field, have been deprecated. These fields still exist but are no longer in use.

- `done`
- `message`
- `state`
- `statusCode`

Because properties related to the status of metadata retrievals have been moved to [RetrieveResult](#), and the asynchronous `create()`, `update()`, and `delete()` calls have been removed, only the `id` field is needed in `AsyncResult`.

### AuthProvider

The following value has been added to the `providerType` field:

#### MicrosoftACS

You can use Microsoft Access Control Service as an authentication provider. Authorization is typically done by a Microsoft Office 365 service like SharePoint® Online.

### ConnectedApp

The following field has been added to the `ConnectedAppCanvasConfig` subtype:

#### lifecycleClass

The name of the `Canvas.CanvasLifecycleHandler` Apex class, if you've implemented this class for custom parameters.

#### samlInitiationMethod

If you're using SAML single sign-on (SSO), indicates which provider initiates the SSO flow. Valid values are:

- `IdpInitiated`—Identity provider initiated. Salesforce makes the initial request to start the SSO flow.
- `SpInitiated`—Service provider initiated. The canvas app starts the SSO flow after it's invoked.
- `None`—The canvas app isn't using SAML SSO.

The following fields have been updated:

#### canvasLocationOptions

The following enumeration values have been added:

- `MobileNav`—The canvas app can appear in a mobile card in the Salesforce1 app.
- `PageLayout`—The canvas app can appear on a page layout. When viewed in the Salesforce1 app, the canvas app appears in the record detail page.

The following field has been added to the `ConnectedAppIpRange` subtype:

#### description

Use this field to identify the purpose of the range, such as which part of a network corresponds to this range.

The following value has been added to the `ConnectedAppOAuthAccessScope` enumeration values. The value is used in the `scopes` field of the `ConnectedAppOAuthConfig` subtype:

#### CustomPermissions

Allows access to the custom permissions in an organization associated with the connected app, and shows whether the current user has each permission enabled.



**Note:** Custom permissions are currently available as a Developer Preview.

### CustomField

An integrity constraint that prevented field data type conversions from being deployed if the field was referenced in Apex has been relaxed. Now, as long as the deploy also includes any required Apex changes, it won't fail on the initial validation. This change eliminates a cumbersome workaround previously required to deploy field type changes. Apex code included in the deployment is still subject to compilation checks and other validation.

## CustomObject

The following fields have been added:

### **enableBulkApi**

When enabled, the custom object is classified as an Enterprise Application object for usage tracking.

### **enableSharing**

When enabled, the custom object is classified as an Enterprise Application object for usage tracking.

### **enableStreamingApi**

When enabled, the custom object is classified as an Enterprise Application object for usage tracking.

### **externalSharingModel**

Indicates the external organization-wide defaults for the custom object, which determines the access level for external users, such as portal and community users. This field is supported for these objects:

- Accounts and their associated contracts and assets
- Cases
- Contacts
- Opportunities
- Custom Objects
- Users

Depending on the object, valid values are:

- Private
- Read
- ReadWrite
- ReadWriteTransfer
- FullAccess
- ControlledByParent

For example, the User object supports `Private` and `Read` values. Accounts, opportunities, and custom objects support `Private`, `Read` and `ReadWrite` values.

### **historyRetentionPolicy**

Represents the policy for retaining field history data. By setting a policy, you can specify the number of months you want to maintain field history in Salesforce, and the number of years you want to retain field history in the archive.

## FlexiPage

The following field has been added:

### **description**

The optional description text of the Flexible Page.

The following field has been updated:

### **componentName**

This field is now required.

## Flow

The following fields have been added:

**actionCalls**

An array of nodes that define calls to actions.

**processType**

The process type. Valid values are:

- `AutoLaunchedFlow`—a flow whose active version (or latest version, if there's no active version) is trigger-ready
- `Flow`—a flow whose active version (or latest version, if there's no active version) isn't trigger-ready, because it contains one or more restricted elements or resources
- `Workflow`—Reserved for future use

The following field has been added to the `FlowFormula` subtype:

**dataType**

The data type for the formula. Valid values are:

- `Boolean`
- `Currency`
- `Date`
- `DateTime`
- `Number`
- `String`

The `sObjectInputReference` field name has been renamed to `inputReference` on these subtypes.

- `FlowRecordCreate`
- `FlowRecordDelete`
- `FlowRecordUpdate`

**FeedLayout**

The following fields have been added:

**autocollapsePublisher**

Specifies whether the publisher is automatically collapsed when it's not in use (`true`) or not (`false`).

**fullWidthFeed**

Specifies whether the feed expands horizontally to take up all available space on the page (`true`) or not (`false`).

The following values were added to the `FeedItemType` enumeration that is used in the `FeedLayoutFilter` subtype:

**AdvancedTextPost**

Feed items with advanced text formatting, such as group announcements.

**QuestionPost**

Feed items with a required title and an optional body. One comment at a time can be selected as the best answer.

**ProfileSkillPost**

Feed items generated when a skill is added to a user's Chatter profile.

**HomePageComponent**

The following fields have been added:

**height**

Required for Visualforce Area components. Indicates the height (in pixels) of the component.

**page**

This field is only available for Visualforce Area components and indicates the API name of the Visualforce page that is associated with the component.

**showLabel**

This field is only available for Visualforce Area components and specifies whether the component displays with a label (`true`) or not (`false`).

**showScrollbars**

This field is only available for Visualforce Area components and specifies whether the component displays with scrollbars (`true`) or not (`false`).

The `visualforcePage` value has been added to the `PageComponentType` enumeration.

**KnowledgeSettings**

The following field has been added:

**enableChatterQuestionKBDeflection**

Indicates whether tracking for case deflection via Chatter is enabled (`true`) or not (`false`).

**Layout**

The following field has been added to the `ReportChartComponentLayoutItem` subtype:

**error**

Error string; only populated if an error occurred in the underlying report.

The following field has been added to the `LayoutItem` subtype:

**canvas**

Reference to a canvas app.

The following fields have been added to the `SidebarComponent` subtype:

**componentType**

Specifies the type of sidebar component. Valid values are `KnowledgeOne`, `Lookup`, `Milestones`, `RelatedList`, and `Topics`.

**relatedlists**

If the component is a related list, the name of the list.

The following field has been removed from the `SidebarComponent` subtype:

**knowledgeOneEnable**

This field has been replaced by the `KnowledgeOne` value on the `componentType` field.

**LiveChatAgentConfig**

The following fields have been added:

**enableAgentFileTransfer**

Indicates whether file transfer is enabled for agents (`true`) or not (`false`).

**enableChatTransfer**

Indicates whether chat transfer is enabled for agents (`true`) or not (`false`).

**transferableButtons**

Specifies the list of chat buttons that agents can transfer chats to.

**transferableSkills**

Specifies the list of skill groups that agents can transfer chats to.

**Network**

The following fields have been added:

**enableGuestChatter**

Specifies whether guest users can access public Chatter groups in the community without logging in.

**enableReputation**

Determines if reputation levels can be set up and displayed on community member's profiles.

**reputationLevels**

The reputation levels assigned to members when they accrue points by performing certain actions.

**reputationPointsRules**

The points members accrue when they perform certain defined actions.

**PermissionSet**

In Developer Edition only, the following field has been added.

**customPermissions**

Indicates which custom permissions are available to users assigned to this permission set.

**Profile**

In Developer Edition only, the following field has been added.

**customPermissions**

Indicates which custom permissions are available to users assigned to this profile.

The following field has been added to the ProfileLoginIpRange subtype:

**description**

Use this field to identify the purpose of the range, such as which part of a network corresponds to this range.

**QuickAction**

The following value has been added to the `standardLabel` (`QuickActionLabel`) and `type` (`QuickActionType`) fields:

**SendEmail**

A simplified version of the Case Feed Email action that is available on Salesforce1.

**ReportType**

The following value has been added to the `category` field (`ReportTypeCategory` enumeration).

**territory2**

Represents a report type category for Territory Management 2.0 (Beta).

**RetrieveResult**

The following fields have been added:

**done**

Required. Indicates whether the `retrieve()` call is completed (`true`) or not (`false`). This field is available in API version 31.0 and later.

**errorMessage**

If an error occurs during the `retrieve()` call, this field contains a descriptive message about this error. This field is available in API version 31.0 and later.

**errorStatusCode**

If an error occurs during the `retrieve()` call, this field contains the status code for this error. This field is available in API version 31.0 and later.

For a description of each `StatusCode` value, see “`StatusCode`” in the [SOAP API Developer's Guide](#).

**status**

The status of the `retrieve()` call. Valid values are:

- `Pending`
- `InProgress`
- `Succeeded`
- `Failed`

This field is available in API version 31.0 and later.

**success**

Indicates whether the `retrieve()` call was successful (`true`) or not (`false`). This field is available in API version 31.0 and later.

**SecuritySettings**

The following fields have been updated in the `PasswordPolicies` subtype:

**complexity**

Two new options are available: `UpperLowerCaseNumeric` and `UpperLowerCaseNumericSpecialCharacters`. For more information, see [Uppercase and Lowercase Password Complexity Option](#).

**minPasswordLength**

`TwelveCharacters` is now an option. For more information, see [Longer Minimum Password Length Option](#).

**historyRestriction**

The maximum value for this field increased from 16 to 24. For more information, see [Additional Password History Options: Remember Up to 24 Passwords](#).

The following field has been added to the `PasswordPolicies` subtype:

**minimumPasswordLifetime**

Indicates whether a one-day minimum password lifetime is required (`true`) or not (`false`). For more information, see [Minimum Password Lifetime Option](#).

The following fields have been added to the `SessionSettings` subtype:

**enablePostForSessions**

Indicates whether cross-domain session information is exchanged using a POST request instead of a GET request, such as when a user is using a Visualforce page. In this context, POST requests are more secure than GET requests. For more information, see the release note [Cross-Domain Exchanges Switch to POST Requests](#).

**forceLogoutOnSessionTimeout**

Indicates that when sessions time out for inactive users, current sessions become invalid. Browsers are automatically refreshed and return to the login page. To access the organization again when this occurs, users must log in again. Enabled (`true`) or not (`false`).

## Territory

The following field has been added:

### **accountAccessLevel**

Specifies whether users in this territory can access accounts that are assigned to this territory and are otherwise inaccessible. Valid values are:

- Read
- Edit
- All

## Salesforce Console API (Integration Toolkit)

The toolkit includes new methods that let you customize a console's navigation tab and interaction log programmatically.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an additional cost

For more information (English only) about the toolkit, see the [Salesforce Console Integration Toolkit Developer's Guide](#).

The following methods are new or have changed in API version 31.0. They are organized for use with an interaction log, navigation tab, or logout.

For use with an interaction log:

### **fireOnCallBegin()**

Fires an event that notifies a call has begun. Use to get information or send information between an interaction log and a custom console component. This method is only available in API version 31.0 or later.

### **fireOnCallEnd()**

Fires an event that notifies a call has ended. Use to get information or send information between an interaction log and a custom console component. This method is only available in API version 31.0 or later.

### **fireOnCallLogSaved()**

Calls the `eventHandler` function registered with `onCallLogSaved()`. Use to get information or send information between an interaction log and a custom console component.. This method is only available in API version 31.0 or later.

### **onCallLogSaved()**

Registers a function that is fired when an interaction log saves a call log. Use to get information or send information between an interaction log and a custom console component. This method is only available in API version 31.0 or later.

### **onSendCTIMessage()**

Registers a function that is fired when a message is sent with the `sendCTIMessage()`. Use to get information or send information between an interaction log and a custom console component. This method is only available in API version 31.0 or later.

### **setCallAttachedData()**

Sets the call data associated with a call object ID. Use to get information or send information between an interaction log and a custom console component. This method is only available in API version 31.0 or later.

**setCallObjectIds ()**

Sets call object IDs, in ascending order of arrival. This method is only available in API version 31.0 or later.

For use with a navigation tab:

**focusNavigationTab ()**

Focuses on the navigation tab. This method is only available in API version 31.0 or later.

**getNavigationTabs ()**

Returns all of the objects in the navigation tab. This method is only available in API version 31.0 or later.

**getSelectedNavigationTab ()**

Returns the selected object in the navigation tab. This method is only available in API version 31.0 or later.

**refreshNavigationTab ()**

Refreshes the selected navigation tab. This method is only available in API version 31.0 or later.

**setSelectedNavigationTab ()**

Sets the navigation tab with a specific ID or URL. This method is only available in API version 31.0 or later.

For use with logout:

**sforce.console.ConsoleEvent.CONSOLE\_LOGOUT**

Delays the execution of logging out of a console when a user clicks **Logout**. This standard event is only available in API version 31.0 or later.

## Open CTI API

Open CTI includes a new method that lets you retrieve phone numbers from a Salesforce call center's directory.

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

For more information (English only) about the toolkit, see the [Open CTI Developer's Guide](#).

The following method is new in API version 31.0.

**getDirectoryNumbers ()**

Returns the list of phone numbers from the call center's directory.

## Analytics Dashboards API

Use the Analytics Dashboards API to integrate Salesforce dashboard data into your applications programmatically.

For more information, see [Analytics Dashboards API \(Generally Available\)](#) in the release notes Analytics section.

## ISVforce

Improvements include a new Partner Community for ISVs, a simplified package installer, packaging of mobile apps, usage metrics tracking and visualization, as well as enhancements to package licensing and the Environment Hub.

### ***New Partner Community***

The new Partner Community, at <https://partners.salesforce.com>, is now the primary resource for all ISVs. Access the latest ISV content, collaborate with other partners and salesforce.com using our Chatter community, and stay up to date on news and events related to the AppExchange Partner Program.

### ***Simplified Package Installer***

The package installer has been redesigned for speed and simplicity. All configuration options appear on one screen, and users can complete the installation with a single click. These improvements make installing a package as easy as installing an app on a mobile phone.

### ***Usage Metrics (Generally Available)***

You can collect detailed usage metrics from each organization in which your managed package is installed. By analyzing this information, you can gain valuable insights into the utilization and performance of your app across your entire customer base.

### ***Usage Metrics Visualization***

The Usage Metrics Visualization package, available from Salesforce Labs on the AppExchange, enables you to visualize trends in usage metrics data for your app. Use the package to generate charts showing changes in various app metrics, over a specified duration, for one or more customer organizations.

### ***License Management App (LMA) Supports Sandbox Installations***

The LMA now generates licenses and leads for package installations in sandbox organizations, in addition to production organizations. This enables you to track prospects who try your app in a sandbox before buying it, a common use case.

### ***Assign Package Licenses Using the API***

Administrators can use the API to assign or revoke licenses for any managed package installed in their organization. This makes managing package licenses in a subscriber organization faster and easier, especially for large-scale deployments.

### ***Create Partner Organizations in the Environment Hub***

You can now create partner organizations directly from the Environment Hub, instead of having to visit the Partner Portal. Partner organizations have higher limits and other advanced features, compared to standard development organizations, so they're well-suited for demos or to test your app with various license types.

### ***Package Mobile Connected Apps (Generally Available)***

Mobile packaging is now available to all customers for free. Mobile packaging solves the app distribution problem for customers building mobile apps on the Salesforce platform, by providing an easy mechanism for distributing those apps to employees or partners.

## **New Partner Community**

The new Partner Community, at <https://partners.salesforce.com>, is now the primary resource for all ISVs. Access the latest ISV content, collaborate with other partners and salesforce.com using our Chatter community, and stay up to date on news and events related to the AppExchange Partner Program.

To get started, we recommend visiting the [Education](#) page, your one-stop shop for all ISV content. In addition, you can use the Partner Community to:

- Collaborate with other partners and salesforce.com using our Chatter community.
- Stay up-to-date on news and events related to the Salesforce Partner Program.
- Log cases for access to partner-specific features and customer support.
- Use enhanced search, integrated with the Success Community, to quickly find relevant resources.
- Browse the Salesforce Partner Online Training catalog and sign up for courses.

The Partner Community is self-service—the first person to register your partnership becomes your designated administrator and manages the creation of additional users for your company. You can change or add administrators, as required.



**Note:** The Partner Portal, at <https://salesforce.com/partnerportal>, can still be used for creating test organizations. If you've set up the Environment Hub, you can also use it to create test organizations. Using the Environment Hub can speed up development by making it easier to manage multiple organizations.

## Simplified Package Installer

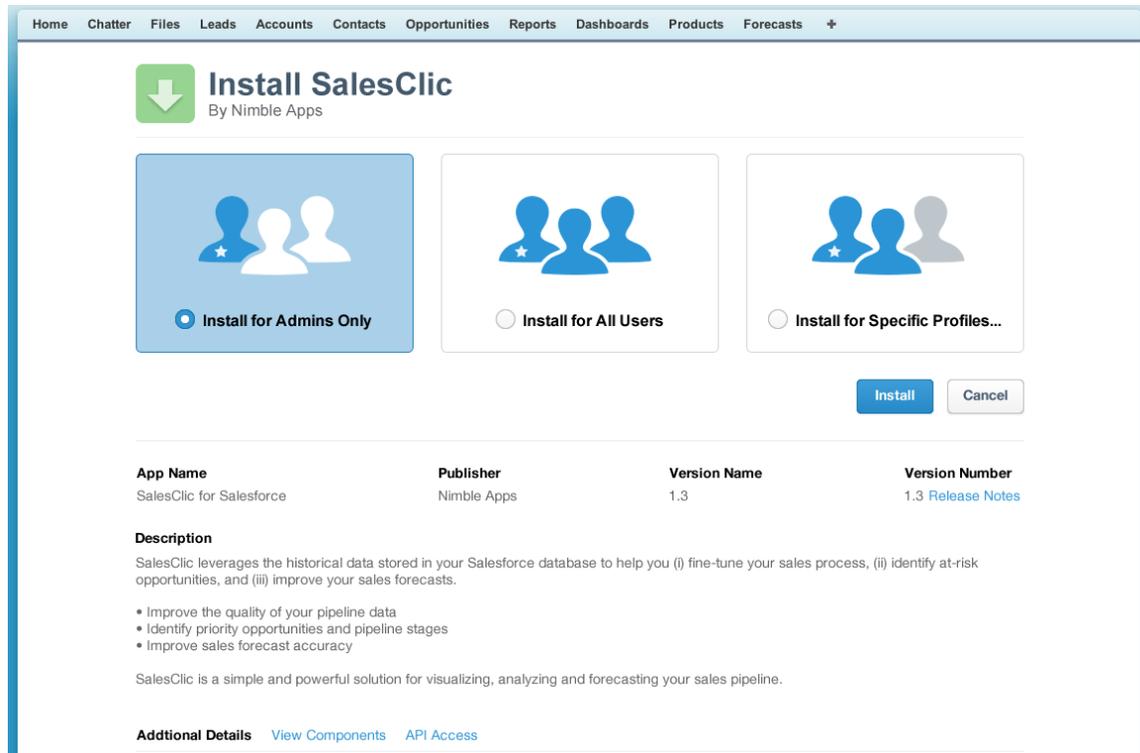
The package installer has been redesigned for speed and simplicity. All configuration options appear on one screen, and users can complete the installation with a single click. These improvements make installing a package as easy as installing an app on a mobile phone.

Available in: <b>Group, Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions
--

User Permissions Needed	
To install packages:	"Download AppExchange Packages"

All customization options in the previous installer are available as separate links outside the default installation path. This ensures that administrators can still specify API access to objects, restrict access to users based on profiles, and so on. However, those features don't prevent users from installing with a single click if they accept the default settings, which is the most common use case.

The new installer also gives developers the option of specifying external links to release notes and post-installation instructions when uploading a package. The links are displayed during installation and on the Package Details page after installation. This feature makes it easy to communicate important information, such as details of new features or post-installation configuration steps, to customers when they're most likely to need it. As a best practice, we recommend that both links point to external URLs, so you can update the information independently of the package.



**Figure 7: Package installation screen showing the different options.**

The new installer always appears when installing an app from the AppExchange. However, when using an installation URL, the old installer is displayed by default. You can customize the installation behavior by modifying the installation URL you provide your customers.

- To access the new installer, append the text `&newui=1` to the installation URL.
- To access the new installer with the "Install for All Users" option selected by default, append the text `&newui=1&p1=full` to the installation URL.

### **Pre-Installation Steps**

#### **Default Installation**

#### **Custom Installation**

#### **Post-Installation Steps**

## **Pre-Installation Steps**

Follow these steps to start the installation process.

1. In a browser, go to the installation URL provided by the package developer, or, if you're installing a package from the AppExchange, click **Get It Now** from the application information page.



**Note:** If you're installing into a sandbox, replace the `www.salesforce.com` portion of the installation link with `test.salesforce.com`. The package is removed from your sandbox organization whenever you create a new sandbox copy.

2. Enter your username and password for the Salesforce organization in which you want to install the package, and then click the login button.
3. If the package is password-protected, enter the password you received from the publisher.

4. Optionally, if you're installing an unmanaged package, select `Rename conflicting components in package`. When you select this option, Salesforce changes the name of a component in the package if its name conflicts with an existing component name.

## Default Installation

Click **Install**. You'll see a message that describes the progress and a confirmation message after the installation is complete.

## Custom Installation

Follow these steps to install a package, if you need to modify the default settings, as an administrator.

1. Choose one or more of these options, as appropriate.
  - Click **View Components**. You'll see an overlay with a list of components in the package. For managed packages, the screen also contains a list of connected apps (trusted applications that are granted access to a user's Salesforce data after the user and the application are verified). Review the list to confirm that the components and any connected apps shown are acceptable, and then close the overlay.



**Note:** Some package items, such as validation rules, record types, or custom settings might not appear in the Package Components list but are included in the package and installed with the other items. If there are no items in the Package Components list, the package might contain only minor changes.

- If the package contains a remote site setting, you must approve access to websites outside of Salesforce. The dialog box lists all the websites that the package communicates with. We recommend that a website uses SSL (secure sockets layer) for transmitting data. After you verify that the websites are safe, select **Yes, grant access to these third-party websites** and click **Continue**, or click **Cancel** to cancel the installation of the package.



**Warning:** By installing remote site settings, you're allowing the package to transmit data to and from a third-party website. Before using the package, contact the publisher to understand what data is transmitted and how it's used. If you have an internal security contact, ask the contact to review the application so that you understand its impact before use.

- Click **API Access**. You'll see an overlay with a list of the API access settings that package components have been granted. Review the settings to verify they're acceptable, and then close the overlay to return to the installer screen.
- In Enterprise, Performance, Unlimited, and Developer Editions, choose one of the following security options.



**Note:** Depending on the type of installation, you might not see this option. For example, in Group and Professional Editions, or if the package doesn't contain a custom object, Salesforce skips this option, which gives all users full access.

### Install for Admins Only

Specifies the following settings on the installing administrator's profile and any profile with the "Customize Application" permission.

- ◇ Object permissions—"Read," "Create," "Edit," "Delete," "View All," and "Modify All" enabled
- ◇ Field-level security—set to visible and editable for all fields
- ◇ Apex classes—enabled
- ◇ Visualforce pages—enabled
- ◇ App settings—enabled
- ◇ Tab settings—determined by the package creator

- ◇ Page layout settings—determined by the package creator
- ◇ Record Type settings—determined by the package creator

After installation, if you have Enterprise, Performance, Unlimited, or Developer Edition, set the appropriate user and object permissions on custom profiles as needed.

### Install for All Users

Specifies the following settings on all internal custom profiles.

- ◇ Object permissions—“Read,” “Create,” “Edit,” “Delete,” “View All,” and “Modify All” enabled
- ◇ Field-level security—set to visible and editable for all fields
- ◇ Apex classes—enabled
- ◇ Visualforce pages—enabled
- ◇ App settings—enabled
- ◇ Tab settings—determined by the package creator
- ◇ Page layout settings—determined by the package creator
- ◇ Record Type settings—determined by the package creator



**Note:** The Customer Portal User, Customer Portal Manager, High Volume Customer Portal, Authenticated Website, Partner User, and standard profiles receive no access.

### Install for Specific Profiles...

Enables you to choose the usage access for all custom profiles in your organization. You can set each profile to have full access or no access for the new package and all its components.

- ◇ Full Access—Specifies the following settings for each profile.
  - Object permissions—“Read,” “Create,” “Edit,” “Delete,” “View All,” and “Modify All” enabled
  - Field-level security—set to visible and editable for all fields
  - Apex classes—enabled
  - Visualforce pages—enabled
  - App settings—enabled
  - Tab settings—determined by the package creator
  - Page layout settings—determined by the package creator
  - Record Type settings—determined by the package creator
- ◇ No Access—Specifies the same settings as Full Access, *except* all object permissions are disabled.

You might see other options if the publisher has included settings for custom profiles. You can incorporate the settings of the publisher’s custom profiles into your profiles without affecting your settings. Choose the name of the profile settings in the drop-down list next to the profile that you need to apply them to. The current settings in that profile remain intact.

Alternatively, click **Set All** next to an access level to give this setting to all user profiles.

2. Click **Install**. You’ll see a message that describes the progress and a confirmation message after the installation is complete.

## Post-Installation Steps

If the package includes post-installation instructions, they’re displayed after the installation is completed. Review and follow the instructions provided. In addition, before you deploy the package to your users, make any necessary changes for your

implementation. Depending on the contents of the package, you might need to perform some of the following customization steps.

- If the package includes permission sets, assign the included permission sets to your users who need them. In managed packages, you can't make changes to permission sets that are included in the package, but subsequent upgrades happen automatically. If you clone a permission set that comes with a managed package or create your own, you can make changes to the permission set, but subsequent upgrades won't affect it.
- If you're re-installing a package and need to re-import the package data by using the export file that you received after uninstalling, see "Importing Package Data" in the Salesforce Help.
- If you installed a managed package, click **Manage Licenses** to assign licenses to users.
- Configure components in the package as required. For more information, see "Configuring Installed Packages" in the Salesforce Help.

## Usage Metrics (Generally Available)

You can collect detailed usage metrics from each organization in which your managed package is installed. By analyzing this information, you can gain valuable insights into the utilization and performance of your app across your entire customer base.

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

Tracking changes in your app's usage over time can help you identify:

- The features most and least used — this can help you prioritize your development efforts when planning the next version of your app.
- The customers using your app most intensively — these are your most valuable customers.
- The customers whose usage of your app is minimal or declining — these are the customers most at risk of attrition.

You can collect the following daily metrics on two types of components in a managed package.

- **Custom objects** — the total number of records existing per organization in each custom object. This enables you to track how the usage of that custom object is growing with time in any subscriber organization, which is a reliable indicator of how much it's being utilized
- **Visualforce pages** — the number of times per organization each Visualforce page was accessed, the number of unique users who accessed it, and the average loading time (in milliseconds). By comparing the metrics for different Visualforce pages, you can determine the relative popularity of different parts of your app in a specific customer organization, as well as trends across all customers.

The custom objects data is a snapshot that reflects the state of the organization at the time the database was sampled, while the Visualforce data covers usage over a 24-hour period.

The usage metrics data for all production organizations in a given instance is merged and written into a text file, in a specified format, once a day. Currently, no data is collected on packages installed in sandbox organizations or on managed beta packages.

This feature is intended for API access only. The usage data for a package is stored in [MetricsDataFile](#) records in your reporting organization. You must write a custom process to collect the metrics data from the reporting organization, and export it to a system of your choice for analysis. This gives you the maximum flexibility to monitor and analyze the usage trends most relevant for your app.

Your customers' consent is not required for usage data to be collected, and there's no way for them to opt out. This ensures you receive complete data for your entire customer base. Allowing some users to be excluded would skew the results, making the data less useful.



**Note:** If any of your customers have concerns about privacy, reassure them any data collected is limited to usage statistics. No customer data is ever exposed to the ISV under any circumstances. This is consistent with salesforce.com's emphasis on trust as a core value.

### [Setting up Usage Metrics](#)

### [Accessing Usage Metrics Data](#)

## Setting up Usage Metrics

To set up Usage Metrics for any package, two organizations have special importance.

- **Release organization** — the Development Edition organization used to upload the package.
- **Reporting organization** — the organization to which the usage data is delivered, on a daily basis.

The release organization and reporting organization must be members of the same Environment Hub. This is a security feature, to ensure usage data is only delivered to an organization controlled by the developer of the package. We recommend using the Environment Hub as your reporting organization.



**Note:** For information on setting up and connecting organizations to the Environment Hub, see [Environment Hub](#) in the online help.

To set up Usage Metrics for a package:

1. Set up Environment Hub, if you haven't already done so.
2. Connect the release organization to the Environment Hub.
3. Connect the reporting organization to the Environment Hub (if they're different).
4. Log a case in the [Partner Community](#) to activate Usage Metrics. You'll need to provide the package ID for your app.

Once the feature is activated, you'll receive a confirmation email. From that point on, usage data will automatically be collected from all organizations in which your package is installed, and delivered to the reporting organization on a daily basis. There is no way to get usage data retroactively, that is, for any period prior to the activation of Usage Metrics.

## Accessing Usage Metrics Data

The usage data for a package is stored in `MetricsDataFile` records in your reporting organization. Once you activate the Usage Metrics feature, one new record is created for all custom objects and one for all Visualforce pages, per Salesforce instance per day.



**Note:** To see the number of Salesforce instances currently in use, visit [trust.salesforce.com](https://trust.salesforce.com).

The usage data for each day and instance is stored as a text file, encoded in Base 64, in the `MetricsDataFile` field of the record. Other fields in the record identify these properties.

- Namespace prefix of the package
- Salesforce instance
- Start time and date of data collection
- End time and date of data collection
- Size of the data file in bytes
- Type of data, which is either `CustomObject` or `Visualforce`

The custom objects data is a snapshot that reflects the state of the organization at the time the database was sampled, while the Visualforce data covers usage over a 24-hour period.

The custom object count is a snapshot captured once each day. Here's a section of a sample data file for custom objects. It shows there were 3500 and 1500 records in the Alpha and Beta custom objects, respectively, in the specified customer organization on the specified day.

```
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","Alpha", "3500"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","Beta", "1500"
```

In a record for Visualforce pages, each row of the text file contains usage data in the following order.

- Organization ID
- Organization name
- Organization edition
- Organization status
- Name of the Visualforce page
- Number of times the page was accessed
- Number of unique users who accessed the page
- Average loading time of the page, in milliseconds

The Visualforce counts for each organization measure the number of times the page was viewed in the duration between the start and end times. Here's a section of a sample data file for Visualforce pages.

```
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gm12__f1","1","1","66.0"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gm12__f2","1","1","128.0"
"00Dxx0000001gbk","org1","Enterprise Edition","TRIAL","/apex/gm12__f3","1","1","107.0"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gm12__f1","5","1","73.6"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gm12__f2","1","1","72.0"
"00Dxx0000001gbf","org1","Enterprise Edition","TRIAL","/apex/gm12__f3","7","1","50.8"
```

You must write a custom process to query the reporting organization to collect the metrics data, and export it to a system of your choice for analysis. This gives you the maximum flexibility to monitor and analyze the usage trends most relevant for your app.

## Usage Metrics Visualization

The Usage Metrics Visualization package, available from Salesforce Labs on the AppExchange, enables you to visualize trends in usage metrics data for your app. Use the package to generate charts showing changes in various app metrics, over a specified duration, for one or more customer organizations.

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

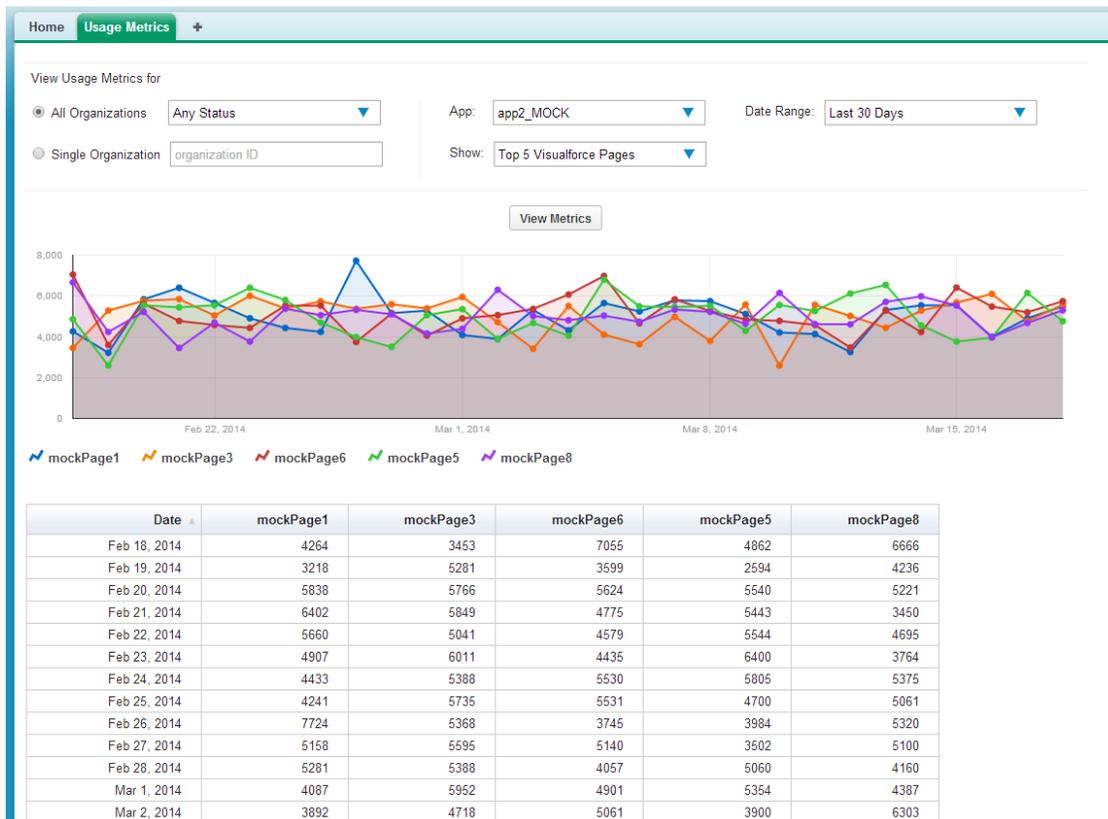
The app must be installed in your Usage Metrics reporting organization and requires Usage Metrics to be enabled in advance, so some data is available for analysis. You can analyze data going back a maximum of 30 days. If Usage Metrics wasn't enabled for the entire time period that you specify, only partial data is plotted.

The app is intended as a reference implementation, for illustration purposes only. It's distributed as an unmanaged package, so you can review its components and extend or customize it to meet your requirements. If your visualization needs are more complex, you can export the raw metrics data from the reporting organization and analyze it by using custom code or a third-party tool.

To install the Usage Metrics Visualization app:

1. Go to the AppExchange and search for the Usage Metrics Visualization app.
2. Click **Get It Now**.
3. Enter the credentials for your reporting organization, and then click the login button.
4. Click **Install**.

You'll see a message describing the progress and a confirmation message after the installation is complete.



**Figure 8: The Usage Metrics Visualization app showing data for the top five Visualforce pages.**

To visualize the usage metrics data:

1. Specify the app whose metrics you want to view by selecting it from the App menu.



**Note:** You should have enabled Usage Metrics for your app at least a few days before, so some usage data is available to analyze.

2. Specify the organization(s) that you want to view metrics for by choosing one of these options.
  - For a single organization, enter its Organization ID in the Single Organization field.
  - For a group of organizations, select one of the following from the All Organizations menu.
    - ◇ Any Status
    - ◇ All Active: These are organizations used by paying customers.
    - ◇ All Free: These are Developer Edition (DE) organizations.
    - ◇ All Trial: These are trial organizations, which expire after a specified period.
3. Specify the type of metric that you want to visualize by selecting one of these values from the Show menu.

- Total Visualforce Page Views
- Top 5 Visualforce Pages
- Total Record Count
- Top 5 Objects by Record Count

4. Specify the time period to cover by selecting one of these values from the Date Range menu.

- Last 30 Days
- Last 7 Days
- Last 2 Days



**Note:** If the volume of usage data is too large, you might get an error message. In that case, choose a smaller date range and try again.

5. Click **View Metrics**.

The data you specified is displayed on the page as a chart and as a table. To visualize a different data set, change the parameters, and then click **View Metrics** again.

## License Management App (LMA) Supports Sandbox Installations

The LMA now generates licenses and leads for package installations in sandbox organizations, in addition to production organizations. This enables you to track prospects who try your app in a sandbox before buying it, a common use case.

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

User Permissions Needed	
To configure the LMA:	System Administrator profile
To edit licenses and packages:	“Read” AND “Edit”
To view licenses, packages, and package versions:	“Read”

A sandbox license record and a lead are created in the LMA under these conditions.

- Your package is installed in a sandbox organization, from the AppExchange or via an installation URL.
- A sandbox is created from a production organization that has your package installed.

The Sandbox field on the License Detail page in the LMA is automatically selected. The license status is free and set to never expire.

## Assign Package Licenses Using the API

Administrators can use the API to assign or revoke licenses for any managed package installed in their organization. This makes managing package licenses in a subscriber organization faster and easier, especially for large-scale deployments.

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

User Permissions Needed	
To manage licenses for an AppExchange app:	“Manage Package Licenses”

License information for a package is stored in two objects, [PackageLicense](#) and [UserPackageLicense](#), which were previously accessible only from the Manage Licenses page under Setup. These are now accessible as standard objects, so an administrator can assign licenses to specific users via API calls.

For example, suppose an administrator installs an app for use by all 200 salespeople in the company. Assigning a license to each salesperson from the UI is inefficient and time-consuming. Using the API, the administrator can assign licenses to all salespeople, based on their profile, in one step.



**Note:** This feature is for use by customers in their subscriber organization after they purchase a license for an app. ISVs should continue using the License Management App to control customer licenses.

Here are some common licensing tasks that administrators can use the API to do.

- Determine the number of package licenses in use and available.
- Verify if a specific user has a license for the package.
- Get a list of all users who have a license for the package.
- Assign a package license to a user or group of users.
- Revoke a package license that was previously assigned to a user.

## Create Partner Organizations in the Environment Hub

You can now create partner organizations directly from the Environment Hub, instead of having to visit the Partner Portal. Partner organizations have higher limits and other advanced features, compared to standard development organizations, so they're well-suited for demos or to test your app with various license types.

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

User Permissions Needed	
To set up and configure the Environment Hub:	“Manage Environment Hub”
To connect an organization to the Environment Hub:	“Connect Organization to Environment Hub”



**Note:** These organizations are strictly for internal use by partners and should not be shared with customers or prospects.

To create a partner organization in the Environment Hub:

1. On the Environment Hub, click **Create Organization**.
2. On the page that appears, from the drop-down list, choose `Partner (more features)`.
3. On the page that appears, specify the organization's edition, name, and My Domain, and the admin user's name, user name, and email address.
4. Read and accept the Master Subscription Agreement.
5. Click **Create**.

After the organization is created, it appears in the Environment Hub, and you get an email confirmation.

## Package Mobile Connected Apps (Generally Available)

Mobile packaging is now available to all customers for free. Mobile packaging solves the app distribution problem for customers building mobile apps on the Salesforce platform, by providing an easy mechanism for distributing those apps to employees or partners.

Connected Apps can be created in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions  
 Connected Apps can be installed in: **All** Editions

User Permissions Needed	
To read:	“Customize Application”
To create, update, or delete:	“Customize Application” AND either “Modify All Data” OR “Manage Connected Apps”
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application”
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	“Customize Application” AND “Modify All Data”
To uninstall:	“Download AppExchange Packages”

When creating a mobile connected app, you can specify a set of mobile packaging attributes, such as the platform, version, form factor, and mobile app binary file. If you then include the mobile connected app as a component when creating a package, these attributes are included in the package and migrated when a user moves a package from one organization to another. In addition, after you create and package a mobile connected app, it’s instantly available for distribution via a listing in the Private AppExchange.

Here are the steps for creating a mobile connected app.

1. From Setup, click **Create > Apps**.
2. In the Connected Apps section, click **New**.
3. Enter the relevant information in the Basic Information, API (Enable OAuth), and Web App Settings sections.
4. Enter the following information in the Mobile App Settings section.
  - a. Select `PIN Protect`, if your app supports PIN protection. This gives an administrator the option of setting the session timeout and PIN length for mobile applications after installing the connected app. PIN protection is automatically supported by the Salesforce Mobile SDK ([https://developer.salesforce.com/page/Mobile\\_SDK](https://developer.salesforce.com/page/Mobile_SDK)). You can also implement it manually by reading the `mobile_policy` object from the user’s Identity URL.
  - b. Specify the `App Platform` by choosing iOS or Android from the drop-down list.
  - c. Specify the supported device form factor(s) for the mobile app from the `Restrict to Device Type` drop-down list. The possible values are Phone, Tablet, or Mini-Tablet. If the app is universal (that is, supports all form factors), don’t choose any value.
  - d. Enter the `App Version` number of the mobile app.
  - e. Enter the `Minimum OS Version` required for the app.
  - f. Select `Private App` to confirm this app is for internal (non-public) distribution only. This is required because Apple doesn’t allow distribution of public mobile apps outside of its app store.

- g. If the mobile app is private, specify the location of the `Mobile App Binary` file. This is an IPA file for iOS and an APK file for Android.
- h. For iOS apps only:
  - i. Specify the location of the Application Icon. This is the icon displayed during download and installation of the app on an iOS device.
  - ii. Specify the iOS Bundle Identifier.



**Note:** For iOS 7 and higher, you must specify the same bundle identifier that you used for developing the app in XCode. Otherwise, the end user will see two app icons on app installation.

- i. If the mobile connected app is a public app and you haven't uploaded its binary file to Salesforce, enter the `App Binary URL` here.

## 5. Click **Save**.

You can now publish your app, make further edits, or delete it.



**Note:** If you remove mobile integration from a new version of an existing connected app, mobile integration is no longer included in any version of the connected app. For example, imagine publishing a package containing version 1.0 of your connected app with mobile integration. Then remove mobile integration from the app, repackage it, and publish it as version 1.1. If a customer installs the earlier package with version 1.0 at this point, the version 1.0 connected app will not contain mobile integration.

Your connected app can receive push notifications if:

- Your app is built with Salesforce Mobile SDK.
- Your app implements the Mobile SDK push notification protocol for your platform.
- You are a registered developer with the mobile platform provider (Apple or Google).
- Your app is registered with Apple Push Notification Service (APNS) for iOS push notifications or with Google Cloud Messaging (GCM) for Android push notifications.
- You've implemented Apex handlers for push notifications.



**Note:** A push-enabled connected app can support only one mobile platform. If you provide Android and iOS versions of your mobile app and need to support push notifications on both versions, create a connected app for each platform.

To learn how to fulfill these requirements, see the [Salesforce Mobile Push Notifications Implementation Guide](#).

## Other salesforce.com Products

### **desk.com**

Desk.com is an all-in-one customer support app for small businesses and growing teams.

For information on new features, go to the [Desk.com Product Updates Blog](#).

### **Heroku**

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).

### **Salesforce Marketing Cloud**

Salesforce Marketing Cloud is a unified social marketing suite that allows companies to listen to and engage customers, publish content, optimize social advertising, measure campaigns, and integrate social insights with customer data.

For information on new features, go to the [Salesforce Marketing Cloud Facebook page](#).

# Help and Training

## Videos

- 
[Troubleshooting Workflow](#)

Learn how to investigate and troubleshoot the most common issues that occasionally arise with Workflow.
- 
[Accessing the Email Field from a Lookup Object](#)

Have you ever wanted to use a field from a lookup object on its child object? For example, accessing the email field on a lookup object in a workflow that is based on the child object? This video walks you through just such a scenario.
- 
[How to Calculate the Number of Days a Case is Open](#)

This video walks you through constructing a formula that will calculate the number of days it took to close a case, or if the case is still open, how many days have passed since it was first opened.
- 
[How to Build an Image Formula](#)

This video explains how to create a quick and easy formula that adds graphics to the ratings field on a lead—five stars for hot, three stars for warm, and one star for cold—so that salespeople can see at a glance which leads are the most important.

## Trust and Compliance Documentation

The [Salesforce.com Trust and Compliance Documents](#) have undergone seasonal updates. Click the link to view the documents. You don't need to log in to [help.salesforce.com](https://help.salesforce.com).

## Tip Sheets and Implementation Guides

- The *Visual Workflow Implementation Guide* has been reorganized, expanded, and renamed! Now called the *Visual Workflow Guide*, the guide goes into more detail about the different ways to distribute flows to your users. Also, the guide is now available in [HTML](#) in addition to [PDF](#).
- The *Communities Managers Guide* is a new guide designed to help community managers learn about and use the Community Engagement Console.

## Developer Guides

- The *Development Lifecycle Guide* contains a new chapter that covers best practices for the advanced development lifecycle, which applies to companies where concurrent application development and programmatic customizations occur. This chapter provides best practices for the sandbox environments to use, tips about which tools to use, a recommended workflow for team development, and other general recommendations.