



Salesforce.com: Summer '11

Salesforce.com Summer '11 Release Notes



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About the Release Notes

The Release Notes are a user guide for the latest release of Salesforce. Unlike a traditional release notes document that includes only a simple list of enhancements, we give you what you need to get up and running with the new features and enhancements in the latest Salesforce release.

What's Included in the Release Notes

For every new major enhancement, the Release Notes provide:

- A brief, high-level description of the functionality
- Implementation tips to help you get started with setup and administration
- Best practice tips to help you maximize the benefit of the functionality
- Complete end-to-end instructions on how to set up and use the functionality

Beyond the major new features, the Additional Enhancements sections include a list and brief description of every other enhancement or functional change included in the latest release—everything from email enhancements, to new report types, to security and packaging enhancements.

Let the Release Notes be your guide to success with the latest release from salesforce.com!

Your Feedback Matters

We know how important the Release Notes, online help, and documentation are to your company's success with Salesforce. To continually improve the content we deliver to you, we want to know what works and what doesn't. Let us know!

- Feedback forms—Every HTML documentation page, both in the online help and in our developer guides at [Developer Force](#), includes a feedback form for you to submit your suggestions, corrections, and feedback about the documentation. Let us know what you think!
- IdeaExchange—We're listening to your ideas too. Summer '11 includes some of your top ideas. Visit [IdeaExchange](#) for a complete list of ideas coming in Summer '11.

Want to be notified whenever we publish new documentation or make significant updates to existing documentation? Follow us on Twitter: [@salesforcedocs](#).

Summary of Summer '11 Features and Impact on Salesforce Users

Summer '11 has features that immediately impact all users after the release. You might 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.

The following table summarizes the Summer '11 features and their impact on users. Review the feature details for the applicable Salesforce Editions.

Collaboration Cloud Enhancements

Chatter

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.
Chatter Favorites	✓			
Chatter Feeds on List Views	✓			
Chatter REST API				✓
Chatter Search Enhancements	✓			
Chatter Files Enhancements	✓			
Chatter Feeds Enhancements	✓			
Chatter Groups Enhancements	✓			
Chatter Mobile App for Android Devices			✓	
Chatter Mobile App Updates for BlackBerry Mobile Devices			✓	
Chatter Mobile App Updates for iOS Mobile Devices			✓	
Login IP Restriction Bypass for Chatter Mobile App Users			✓	
Push Notifications in Chatter Mobile Apps			✓	
Salesforce Mobile Chatter Pilot Deprecation	✓			
Chatter Desktop Enhancements			✓	

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.
Filtering Record Recommendations	✓			
People Recommendations on Profiles	✓			
Parent Record Recommendations	✓			
Personal Chatter Activity Statistics	✓			
Chatter Expert User	✓			
Chatter Invitations Link			✓	
Moderate Chatter Perm Available for all Profiles	✓			

Sales Cloud Enhancements

Sales Productivity

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.
Salesforce for Outlook Enhancements			✓	
List View Updates	✓			
Activity Reminder Enhancements	✓			
Event Invitation Enhancements	✓			
Cloud Scheduler Enhancements	✓			

Salesforce CRM Content

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.
Salesforce CRM Content Workspaces Are Now Called Libraries	✓			

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.
Include Chatter Files in Salesforce CRM Content Searches with New Setting		✓		

Service Cloud Enhancements

Entitlement Management

Feature	Automatically visible to all users. No setup required.	Automatically visible to all administrators. No setup required. Available to Enterprise and Unlimited Editions with the Service Cloud.	Not automatically visible. Feature is available but requires some setup.	Contact salesforce.com to enable this feature.
Case Milestone Custom Layouts		✓		

Salesforce Knowledge

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.
Adding Object Permissions to Salesforce Knowledge Article Types		✓		
Creating Workflow Rules and Approval Processes for Salesforce Knowledge Article Types		✓		
Updated Public Knowledge Base Package on the AppExchange			✓	
Searching Article Attachments	✓			
Attaching Translated Articles to Cases			✓	
Advanced Article Reporting	✓			
Salesforce Knowledge Enhancements	✓			

Service Cloud Console

Feature	Automatically visible to all users. No setup required. Available to Enterprise and Unlimited Editions with the Service Cloud.	Automatically visible to all administrators. No setup required.	Not automatically visible. Feature is available but requires some setup. Available to Enterprise and Unlimited Editions with the Service Cloud.	Contact salesforce.com to enable this feature.
Custom Sidebar Components for the Service Cloud Console			✓	
Custom Console Layouts			✓	
Streamlined Tab Names for the Service Cloud Console	✓			
Refreshing Tabs in the Service Cloud Console	✓			
New Methods for the Service Cloud Console Integration Toolkit			✓	

Analytics Enhancements

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.
Announcing the Salesforce Mobile Dashboards iPad App	✓			
Additional Products Available for Purchase			✓	
Report Builder Preview Loading	✓			
Multiple Field Selection in Report Builder	✓			
Report Builder Filter Pane Improvements	✓			
Visible Report Builder Profile Permissions	✓			

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.
Dashboard Component Snapshot Posting to Group Feeds	✓			
No More Dynamic Dashboards “Lost” in Personal Folders	✓			
Updated Video Tutorials for Report Builder	✓			
New Tip Sheet for PARENTGROUPVAL and PREVGROUPVAL Summary Functions	✓			
Improved FAQ for Reports and Dashboards	✓			

Jigsaw Enhancements

Jigsaw

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.
Jigsaw — Generally Available			✓	

Force.com Enhancements

Apex and Visualforce

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.
Force.com Apex Code Enhancements		✓		

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.
Async Test Console		✓		
Dynamic Visualforce Components—Pilot				✓
Visualforce Enhancements		✓		

Customization

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.
Raised Limits for Fields on All Objects		✓		
Changed Limits for Rich Text Area and Long Text Area Fields		✓		
Half-Up Rounding for Display of All Numeric Fields	✓			
Additional Language Support for Force.com				✓

Search Enhancements

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.
Global Search Available in Salesforce Setup Pages	✓			
Accuracy Improvements in Search Results	✓			

Security

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.
Setup Audit Trail Enhancements	✓			
Password Policies Enhancement	✓			
Improved Identity Confirmation Flow		✓		
Just-In-Time Provisioning			✓	
Mobile Phone Verification – Pilot				✓
Blank Portal Attribute Values Allowed in SAML Assertions		✓		
Defer Sharing Calculations				✓
Raised Limit for Sharing Rules		✓		

User Interface Settings and Other Force.com Platform Enhancements

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.
Dependent Lookups—Generally Available	✓			
Enhanced Profile User Interface			✓	
Quick Find Available in Setup	✓			
Monthly Data Export	✓			
Field History Storage		✓		
New Object History Field for Full Sandbox Copy		✓		
Enhanced Field Sets Editor—Beta	✓			
Field Sets Required Bit—Beta	✓			
Field Sets Spanning—Beta	✓			

Web Services API and Developer Tools

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.
API Enhancements			✓	
Force.com Development as a Service Enhancements			✓	

COLLABORATION CLOUD

Chatter Favorites

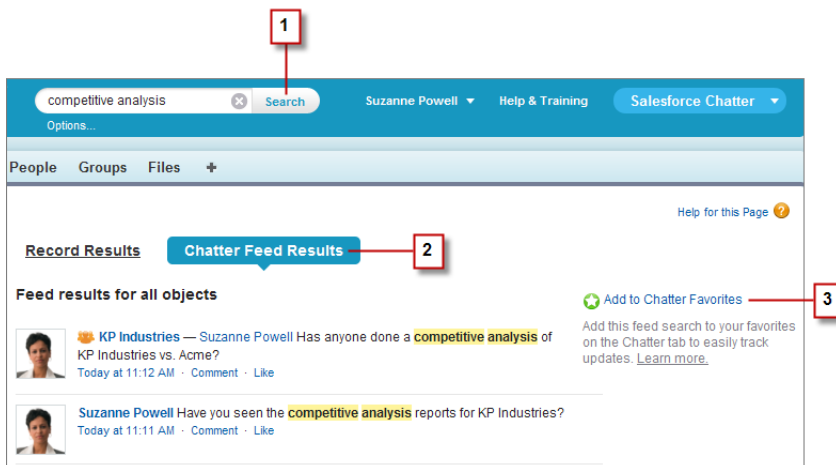
With Summer '11, you can add favorites to the Chatter tab so you can easily access the latest posts and comments for your favorite topics and Chatter feed searches.

Chatter Favorites Overview

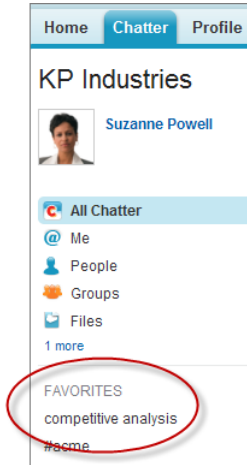
Available in: **Group, Professional, Enterprise, Unlimited, Contact Manager, and Developer** Editions

Chatter favorites on the Chatter tab give you easy access to posts and comments for topics and Chatter feed searches that you want to stay on top of. For example, if you and your coworkers use the topic #UniversalPaper to track information about your customer Universal Paper, you might want to add #UniversalPaper as a favorite so you can easily access these updates without leaving the Chatter tab.

You can add a Chatter feed search or a topic as a favorite. To make a Chatter feed search a favorite:



1. Enter terms in the header search box and click **Search**.
2. Click **Chatter Feed Results** to see the posts and comments that include your search terms.
3. Click **Add to Chatter Favorites**.



The favorite name on the Chatter tab is the same as the search terms you entered. For example, if you searched for `competitive analysis`, your favorite is **competitive analysis**.

To make a topic a favorite:

1. Click a topic, such as `#UniversalPaper`.
2. On the Chatter feed search results page, click **Add to Chatter Favorites**.

The favorite name on the Chatter tab is the same as the topic, **#UniversalPaper**.

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

The Chatter tab displays the four favorites most recently added or viewed.

- Click a favorite to see the updates.
- Click **x more** to see all your favorites.
- Click **x**, which appears on hover, to remove a favorite.

Chatter Feeds on List Views

With Summer '11, you can view Chatter feeds on standard and custom object list views.

Viewing Chatter Feeds on List Views

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

If Chatter is enabled, click **Chatter** on a standard or custom object list view to see a Chatter feed with updates from the last 30 days for the records included in the list view. Click **List** to display the list view again. You can choose a different list view from either mode.

- Click a record name to view the record, or a person's name to view their profile
- Click **Comment** to comment on a post

- Click **Like** to like a post
- Click the timestamp of a post, for example, **Yesterday at 12:57 AM**, to see that post in the feed of its associated record
- Click **Show More** to see older posts

Consider the following tips for Chatter feeds on list views:

- You can only view Chatter feeds on list views for objects enabled for “feed tracking” in the Salesforce online help
- If “drag-and-drop scheduling on list views” in the Salesforce online help is enabled, you won't see Chatter feeds on the list views for accounts, contacts, or leads

Chatter REST API



Note: The Chatter API is currently available as a Developer Preview and is automatically available in all Developer Edition organizations. For information on enabling the Chatter API in other editions, contact salesforce.com.

The Chatter API is a REST API that provides access to Chatter feeds and social data such as users, groups, followers, and files. It's used by developers who want to integrate Chatter into a variety of applications such as mobile applications, intranet sites, and third-party Web applications. The Chatter API is similar to APIs offered by other companies with feeds, such as Facebook and Twitter. Its advantages include ease of integration and development, and it's optimized for Web 2.0 developers.

Use Chatter API to:

- Build a mobile client that displays a Chatter feed.
- Integrate a third-party Web application with Chatter so it can notify groups of users about events.
- Display the Chatter feed on an external system, such as an intranet site, after users are authenticated to Salesforce.
- Make feeds actionable and integrated with third-party sites. For example, an app that posts a Chatter item to Twitter whenever the post includes #tweet hashtag.
- Create simple games that interact with the feed for notifications. Games might include things like sales incentive competitions.

How is the Chatter REST API Different from Salesforce's other APIs?

Chatter API complements the Web services API by making it easy to interact with Chatter data, such as feeds, group information, and Chatter user-profile details. In addition, the Chatter REST API is optimized to work with Web 2.0 resources.

The following are some of the differences between Chatter API and the Web services API:

- Returned information is automatically localized to the user's time zone and language.
- Feed items are structured in a way that makes it easy to render on Web sites and mobile devices.
- Changed values that are tracked in a feed are returned as value-pair representations.
- Relationships between objects can easily be traversed without having to resolve foreign keys. For example, using Chatter API you can get all of a user's followers or groups with one request per page.

Implementation Tips

- Obtain a Salesforce Developer Edition organization. If you already have a Developer Edition organization, verify that your profile has the “API Enabled” permission selected.
- When setting authorization for your Web application using OAuth and a Salesforce remote access application, be sure to keep track of the Consumer Key and Consumer Secret.
- The Chatter REST API uses the Web services API connection limits.

Chatter Search Enhancements

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

Search for Chatter Mentions

With Summer '11, you can use Global Search to find people who are mentioned in Chatter. For example, search for @Madison Rigsby, and click **Chatter Feed Results** to see where Madison Rigsby is mentioned in Chatter posts and comments.

For more information, see “Mentioning People in Posts and Comments” in the Salesforce online help and “Search Fields” in the Salesforce online help.

Add Chatter Favorites from Search Results

With Summer '11, you can add Chatter favorites from your search results so you can easily access the latest posts and comments for your favorite topics and Chatter feed searches. For more information, see [Chatter Favorites](#) on page 12.

Default Search Operator for Files

Previously, the default search operator for files was OR. With Summer '11, the default search operator for files is AND, so searches find items with all of your search terms. For example, searching for `acme california` finds items with the word *acme* and the word *california*, but not items with only the word *acme*.

Chatter Files Enhancements

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



[Watch a Demo on File Collaboration in Chatter](#) (2:56 minutes)

Collaborate on Files in Chatter

Previously, when you shared a file with someone, they had viewer permission which let them view, download, and share the file. Now, when you share a file with a person or a group, you can choose to give them viewer or collaborator permission. Collaborators can view, download, share, change permission, edit the file, and upload new versions. For example, let's say you have a presentation that needs input from someone else. You can upload the presentation in Chatter and then share it with someone. As a collaborator, that person can download the file, add their input, and upload a new version.




Note: When you share a file with someone, they are given collaborator permission by default. When you share a file with a group, the group members are given viewer permission by default. You can change the default permissions when you share a file for the first time. File owners and collaborators can change permissions after a file has been shared.

Share Files with Groups



Share a file with a private group so only members of that group can see it or share a file with a public group so members of that group and all Chatter users in your company can see it. Anyone who can see a file can share it.


To share a file with one or more Chatter groups:

1. On the detail page of the file you want to share, click either  **Share File** or **Show All** on the Shared With list.

You can also click  **Share File** next to the file in a feed.

2. Click **Groups** from the **Share with more:** list.
3. Type the name of the group you want to share the file with and click the name to select it. Group members are given viewer permission by default which lets them view, download, and share files.
4. Optionally, select **Collaborator** to give group members permission to view, download, share, change permission, edit the file, and upload new versions.
5. Optionally, share with more than one group by entering another name.
6. Optionally, add a message that will be posted with the file. If you don't add a message, a generic message is used.
7. Click **Share** and **Close**. The file is posted to each group you shared it with.

A private file shared with a private group becomes a privately shared file and displays the privately shared icon (). The file is posted to the group's feed and only the file owner and group members can find and view the file. Any file shared with a public group is available to all users in your company, displays the your company icon () and is posted to the group's feed.

Click  next to a person's or group's name to stop sharing the file with them.

Change File Permissions

File owners and collaborators can change file permissions from viewer to collaborator and vice versa.

- Viewers can view, download, and share files.
- Collaborators can view, download, share, change permission, edit the file, and upload new versions.

Collaborators can view, download, share, change permission, edit the file, and upload new versions.

To change a file permission:

1. Click **Share File** on a file detail page.
2. Find the person or group whose permission you want to change on the Sharing dialog box.
3. Click the Permission drop down and select either **Make Viewer** or **Make Collaborator**. The change happens immediately.
4. Click **Close**.

Enhanced Filters on the Files Tab



Note: With Summer '11, the name “workspace” has changed. The new name is “library” unless your administrator has changed the name. We haven't changed how it works—just made the name easier to understand. For more information, see [Salesforce CRM Content Workspaces Are Now Called Libraries](#) on page 27.

There are several changes to the filters on the Files tab to help you find and view specific groups of files more quickly and easily.

- **Files I Own** and **Files I Follow** are two new filters that have been added as subfilters under the **MY FILES** filter on the Files tab.
- **Files Shared with Me** has moved and is now also a subfilter under the **MY FILES** filter on the Files tab.
- You can now click on the **MY FILES**, **FILES IN MY GROUPS**, and **FILES IN MY LIBRARIES** filters on the Files tab:
 - **MY FILES**—All files you own, files shared with you, and files you follow.
 - **Files I Own**—Files you:
 - Uploaded on the Files tab. These are private and not shared with anyone, but you can view them, perform actions, share them, and attach them to Chatter feeds.
 - Attached to Chatter feeds from your computer.
 - Uploaded to Salesforce CRM Content libraries you're a member of and your personal library.

- **Files Shared with Me**—All files that have been shared with you either by a private share or a public post to your profile.
- **Files I Follow**—All files that you're following.
- **FILES IN MY GROUPS**—All files you and other people shared to groups you're a member of. The first five groups you're a member of are listed. If you're a member of more than five groups, click **More** to see a complete list.
- **FILES IN MY LIBRARIES**—All files you and other people uploaded to libraries you're a member of and all files you uploaded to your personal library. The first five libraries you're a member of, including your personal library, are listed. If you're a member of more than five libraries, click **More** to see a complete list.






Improved Search on “Select from Salesforce”


Now when you click **File** and **Select a file from Salesforce** on a Chatter feed, you can see and search a specific group of files by clicking a filter on the sidebar:

- **All Files**—All files you own and have access to from Chatter and Salesforce CRM Content, including:
 - Files that have been shared with you
 - Files you're following
 - Files in your Chatter groups
 - Files in your Salesforce CRM Content libraries
 - Files attached by other people to a Chatter feed on the Home tab, Chatter tab, a profile, a record, or a group. This includes files attached to all public groups, whether you're a member or not, and private groups you're a member of, but not private groups you're not a member of.
- **Recently Viewed**—The most recent files you've viewed.
- **MY FILES**—All files you own, files shared with you, and files you follow.
 - **Files I Own**—Files you:
 - Uploaded on the Files tab. These are private and not shared with anyone, but you can view them, perform actions, share them, and attach them to Chatter feeds.
 - Attached to Chatter feeds from your computer.
 - Uploaded to Salesforce CRM Content libraries you're a member of and your personal library.
 - **Files Shared with Me**—All files that have been shared with you either by a private share or a public post to your profile.
 - **Files I Follow**—All files that you're following.
- **FILES IN MY GROUPS**—All files you and other people shared to groups you're a member of. The first five groups you're a member of are listed. If you're a member of more than five groups, click **More** to see a complete list.
- **FILES IN MY LIBRARIES**—All files you and other people uploaded to libraries you're a member of and all files you uploaded to your personal library. The first five libraries you're a member of, including your personal library, are listed. If you're a member of more than five libraries, click **More** to see a complete list.

Additional Actions on Files in Chatter Feeds

Previously, you could preview, download, and view a file's detail page directly from a file post on a feed. With Summer '11, you can also follow, share a file, and upload a new version directly from a feed. The following actions are available on files in feeds depending on your permission.

- **Follow**—Click  **Follow** next to a file to receive updates about the file in the Chatter feed. Click  to stop receiving updates about the file.
- **Share**—Click  **Share File** next to the file to share the file with people or groups.
- **Download**—Click **More Actions**   **Download** next to the file.

- Preview—Click the file thumbnail or click **More Actions** ►  **Preview** next to the file.
- Upload new version—Click **More Actions** ► **Upload new version** next to the file.
- View file detail page—Click **More Actions** ► **View file detail page** next to the file.

RelatedRecordId API Field

The `RelatedRecordId` field, which is the ID of the `ContentVersion` object associated with a `ContentPost`, is now available on Chatter feed objects in the API. For example, set the `RelatedRecordId` to an existing `ContentVersion` and post it to a feed as a `FeedItem` object of `Type ContentPost`. See [Chatter API Objects](#) on page 72.



Default Search Operator for Files

Previously, the default search operator for files was `OR`. With Summer '11, the default search operator for files is `AND`, so searches find items with all of your search terms. For example, searching for `acme california` finds items with the word `acme` and the word `california`, but not items with only the word `acme`.

Chatter Feeds Enhancements

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

Chatter Feed Filter Enhancements

With Summer '11, the  **To: Me** filter is now called  **Me**. This filter displays:

- Posts others make to your Chatter feed
- Others' updates that mention you
- Posts you've made that others commented on

Better Way to Delete Chatter Posts and Comments


Previously, to delete a Chatter post or comment, you had to click the **Delete** link located next to the timestamp. With Summer '11, you click , which appears on hover, to delete posts and comments.



Figure 1: Deleting a Post: Before Summer '11

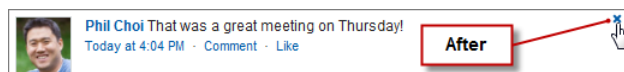



Figure 2: Deleting a Post: After Summer '11

Follow Records in List Views








In list views for records with Chatter feed tracking enabled, click  or  in the Action column to follow or stop following a record.



Note: While you can follow activities and knowledge articles in a Chatter feed, the  **Follow** button in the Action column for activity and knowledge article list views is not available.

Additional File Actions


Previously, you could preview, download, and view a file's detail page directly from a file post on a feed. With Summer '11, you can also follow, share a file, and upload a new version directly from a feed. The following actions are available on files in feeds depending on your permission.

- Follow—Click  **Follow** next to a file to receive updates about the file in the Chatter feed. Click  to stop receiving updates about the file.
- Share—Click  **Share File** next to the file to share the file with people or groups.
- Download—Click **More Actions**  **Download** next to the file.
- Preview—Click the file thumbnail or click **More Actions**  **Preview** next to the file.
- Upload new version—Click **More Actions**  **Upload new version** next to the file.
- View file detail page—Click **More Actions**  **View file detail page** next to the file.

Chatter Groups Enhancements

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

Group Information Field

With Summer '11, you can provide additional information for members of your Chatter groups. Just click **Add Information** or  in the Information section of a group you own or manage. You can customize the section, including the title, to say anything you want. For example, you might want to add contact information for key members, links to important resources, or a list of project objectives.

Group Information Feed Tracking

The `InformationBody` and `InformationTitle` fields are tracked in feeds by default, so a change to the Information section or title displays as a post in the group's feed. Users with the “Customize Application” permission can edit feed tracking settings. For more information, see “Customizing Chatter Feed Tracking” in the Salesforce online help.

Easier Group Email Controls using the Group Email Manager

Now it's easier to customize the email notifications you receive for activity in your Chatter groups. The **Chatter Email Settings** link on groups is renamed to **Email me...**; click **Email me...** and choose how often you want to receive emails for that group: **Every Post**, **Daily Digest**, or **Weekly Digest**. When you select a frequency, the link name changes. For example, selecting **Every Post** changes the link to **Email Every Post**. To stop receiving email for a group's activity, click **Turn Off Group Email**. Clicking **Email Settings** takes you to the Chatter Email Settings page, where you can modify all your Chatter email settings.

New Fields on CollaborationGroup Object

The `CollaborationGroup` object now has the following fields: `HasPrivateFieldsAccess`, `InformationBody`, and `InformationTitle`. See [Chatter API Objects](#) on page 72.

Chatter for Mobile Devices Enhancements

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

Chatter Mobile App for Android Devices

The Chatter mobile app is now available for mobile devices with Android OS 2.1, 2.2, or 2.3. The Chatter mobile app, previously available as a beta version, lets you collaborate in Chatter from your mobile device as follows:

- Receive updates about the people and records you follow and your groups
- View and create posts and comments
- Post photos from your device
- Find and follow people in your organization
- Find and join groups in your organization
- View your coworkers' profiles to see their contact information, bio, who they're following, and who's following them
- Email, call, or text people directly from their Chatter profiles on devices with telephony


Summer '11 includes the following updates from the beta version:

- Links to indicate you like a post
- Support for using @ to create links when mentioning people in posts and comments
- Passcode protection

Download the Chatter mobile app for Android devices from the Android Market.

Chatter Mobile App Updates for BlackBerry Mobile Devices

Summer '11 includes several enhancements to the Chatter mobile app for BlackBerry, including:

- Links to indicate you like a post
- Support for using # to create links when adding topics to posts and comments
- Support for using @ to create links when mentioning people in posts and comments
- Support for the @ Me filter. In the Chatter mobile app, the @ Me filter is available as a tab. Choose the @ tab to display both posts others make to your Chatter feed as well as updates where you were mentioned.
- Ability to search for items in the Chatter mobile app. To find Chatter feeds, groups, or people:
 1. Choose **Search** from the menu.
 2. Enter your search terms in the search box.
 3. Use the Chatter, People, and Groups tabs below the search box to select the type of items you want to find.
 4. Choose .
 5. From the search results, choose an item to open it.



Tip: If your BlackBerry device is running OS 6, you can also find Chatter items using BlackBerry universal search. Select the search icon on your BlackBerry home screen, enter your search terms, then select one of the Chatter icons to launch the search in the Chatter mobile app.

- [Push notifications](#)

Download the updated Chatter mobile app by visiting the BlackBerry App World.

Chatter Mobile App Updates for iOS Mobile Devices

Summer '11 includes several enhancements to the Chatter mobile app for iOS, including:

- Links to indicate you like a post
- Support for using # to create links when adding topics to posts and comments
- Support for using @ to create links when mentioning people in posts and comments
- Support for the @ Me filter, which displays both posts others make to your Chatter feed, as well as updates where you have been mentioned
 - On the iPhone or iPod touch, choose the @ Me tab.
 - On the iPad, choose **Chatter**, then choose **@ Me**.

Download the updated Chatter mobile app by visiting the App Store.

Push Notifications in Chatter Mobile Apps

Chatter mobile app users can now use push notifications to stay aware of important Chatter activity without returning to the app. *Push notifications* are alerts that apps render on mobile device home screens when users are not using the app. These alerts can consist of text, icons, and sounds, depending on the device type.

The Chatter mobile app uses push notifications to notify a user when someone posts on the user's profile, mentions the user in a post, comments on the user's post, and more. To access your organization's push notification settings, click **Your Name** ► **Setup** ► **Mobile Administration** ► **Chatter Mobile** ► **Settings**.



Note:

- Users can disable Chatter push notifications on their devices, but they can't enable them if an administrator deselects the `Enable Chatter Push Notifications` checkbox.
- Chatter push notifications are currently available only for BlackBerry devices.

Login IP Restriction Bypass for Chatter Mobile App Users

Previously, in organizations with login IP restrictions, users could not use the Chatter mobile app outside of the specified IP range. In Summer '11, organizations with login IP restrictions can easily allow specific users and groups to use the Chatter mobile app outside of the login IP range.



Important:

- Users cannot use the Chatter mobile app outside of your trusted IP ranges unless you specifically include them or their group in the list of users who can bypass the login IP restrictions.
- The users you specify can only bypass the restrictions with the Chatter mobile app; they can't access Salesforce through a Web browser outside of the trusted IP ranges.
- You do not need to specify users with BlackBerry devices. BlackBerry devices must already connect through a BlackBerry Enterprise Server with an IP address in a trusted Salesforce IP range.
- To specify trusted IP ranges, click **Your Name** ► **Setup** ► **Security Controls** ► **Network Access**.

To specify which users and groups can use the Chatter mobile app outside of your organization's login IP range:

1. Click **Your Name** ► **Setup** ► **Mobile Administration** ► **Chatter Mobile** ► **IP Restricted Users**.



Note: The IP restriction bypass settings appear only in organizations with profile-based IP restrictions.

2. Specify the users and groups that can bypass the restrictions with the Chatter mobile app.

3. Click **Send Email**. Salesforce sends them an email with download links for the mobile apps your organization supports and a unique activation link. Users must click the activation link on their device to use the Chatter mobile app.



Important: Users with IP restrictions cannot use the Chatter mobile app unless they click the activation link from their mobile device. The activation link cannot be shared or transferred.

Salesforce Mobile Chatter Pilot Deprecation

Starting in Summer '11, users can no longer access the Chatter tab in Salesforce Mobile. User should instead use the separate Chatter mobile app, which provides more features and a richer user experience. The Chatter mobile app is available for iPhone, BlackBerry, and Android devices. Download the Chatter mobile app through the Apple App Store, BlackBerry App World, or the Android Market.




Important: This only affects organizations that opted to participate in the Salesforce Mobile Chatter pilot program. This does not affect access to Chatter through the Chatter mobile app.

Chatter Desktop Enhancements

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

Summer '11 coincides with several updates to Chatter Desktop, including:

- User and group details
- Links to indicate you like a post
- Support for using @ to create links when mentioning people in posts and comments
- Support for using # to create links when adding topics to posts and comments
- The ability to connect with different instances of Salesforce at startup
- The ability to quickly switch between connections by clicking the  icon, selecting **Switch Connection**, and choosing from a list of authenticated connections
- Performance improvements, including image caching
- Norwegian language support
- Various bug fixes

In organizations that allow Chatter Desktop standard installations, Chatter Desktop prompts users to install the updates. You can also download the updated version from **Your Name > Setup > Desktop Integration > Chatter Desktop**.

In organizations that use the Chatter Desktop managed installer, only system administrators can upgrade users to the new version.

Additional Chatter Enhancements

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

Filtering Record Recommendations

You can now filter your record recommendations by object on the Recommendations page.

View your record recommendations on the Chatter tab. To see an expanded list of your recommendations, click **More**. To see your record recommendations by object, click the object in the side filters. For example, click **Accounts** to view only your account recommendations.

Parent Record Recommendations

Chatter recommends records that you view or edit and records that you own (and aren't already following). With Summer '11, Chatter also recommends parent accounts of the records you're following. For example, if you're following Madison Rigsby who is a contact on the Acme account, Chatter recommends the Acme account (if you're not already following it).

People Recommendations on Profiles

Chatter recommends people in your organization that you might want to follow based on similar interests. With Summer '11, you can see a recommendation immediately after following someone on a profile page. This recommendation appears only if you and the person you just followed have shared interests. For example, if you follow Madison Rigsby on her profile page, you can see a recommendation for someone that Madison follows if you also share interests with that person.

Improved Group and Profile Photo Uploading

Now it's easier to upload photos to groups and profiles. Simply hover over the default photo or existing photo on your profile or a group, then click **Add Photo, Update,** or **Delete**.

Personal Chatter Activity Statistics

You can now see your personal Chatter activity statistics on your profile under your photo. Chatter activity statistics include how many posts and comments you've made, how many comments you've received, and how many people liked your posts. You can also see your coworkers' Chatter activity statistics on their profiles.

Suggested Groups for new Chatter Users

When a user enters Chatter the first time, we help them get started by showing a list of groups they can join. These groups are suggestions from Chatter but don't actually get created until a user clicks **Start this group**. Once a user starts a group, others see a **Join** link. By clicking **Start this group**, the user becomes the owner of the group. They can reassign ownership to another user at a later time.

We also create and add users to an All Company group. You can use this group to post important company-wide announcements, events, and Chatter tips. Additionally, if the user doesn't see an applicable group but wants to create one, they can click **create a group** at the bottom of the window.



Note: The Groups You Can Join window only appears the first time a user enters Chatter. Once the user dismisses this window, it won't show up again.

Group Email Frequency Improvements

It's now easier to change the default email frequency for your Chatter groups because we added a setting to the Chatter Email Settings page. You can use `Set default frequency for groups I join`: to choose how often you want to receive emails when joining new groups. Changing the default frequency doesn't affect the groups you already belong to.

We also changed the default email frequency so that notifications are now automatically turned off whenever you join a group. The `DefaultGroupNotificationFrequency` field on the User object now defaults to `N` for Never. See [Chatter API Objects](#) on page 72.



Note: If your organization existed prior to the Summer '11 release and is a Professional, Enterprise, Unlimited, or Developer Edition organization, you may still be receiving daily digests by default.

Chatter Expert User

Starting in Summer '11, each new organization that enables Chatter has a special Chatter Expert user that offers tips, tricks, and sample postings to help users get started with the [default Chatter groups](#). When a user starts one of the suggested groups, the Chatter Expert posts an initial message to that group.



Note: The Chatter Expert only posts to each group one time.

Administrators can stop the Chatter Expert from posting or take over the Chatter Expert and provide the content for the posts. To stop the Chatter Expert from posting, deactivate the user. To take over the Chatter Expert, simply go to the Chatter Expert's profile and change the email address to your own.

Chatter Invitations Enabled for all New Organizations

Starting in June 2011, invitations are automatically turned on for all new Salesforce organizations and the **Email Domain** is set based on the first user's email address. Note that invitations won't be turned on if the user's domain is a free email provider such as yahoo.com or gmail.com. For more information on Chatter invitations, see “Enabling, Disabling and Configuring Chatter” in the Salesforce online help and “Inviting People to Join Chatter” in the Salesforce online help.

Chatter Invitations Link

Inviting your coworkers to Chatter just got easier. Instead of typing each email address into Chatter, you can now use your own email client to send invitations to colleagues or distribution lists. Simply copy and paste the provided invitation URL into your messages.

To send an invitation using your own email account:

1. Click **Invite People to Chatter** on the People tab or **Invite Coworkers!** on the Chatter tab.



Note: You can only invite people with email addresses in your company's supported domains.

2. Click **send your own email invitation** to show an invitation link that you can copy and paste into an email. If you have a default email client set, an email containing the invitation link opens in your mail program.



Note: Only users from your company's supported domains can accept the invitation and join your Chatter network.

Chatter Invitation Reminders

Chatter now sends reminders for invitations. If an invitation isn't accepted within the first day, Chatter sends email reminders 24 hours and 48 hours later.

Moderate Chatter Perm Available for all Profiles

You can now assign moderator privileges to any user in your organization based on their profile. To enable moderator privileges on a profile:

1. Go to *Your Name* ► **Setup** ► **Manage Users** ► **Profiles**.
2. Click **Edit** next to the profile you want.



Note: You can only edit permissions on custom profiles.

3. In the Administrative Permissions section, select **Moderate Chatter**.
4. Click **Save**.

You can verify that a user is a moderator by viewing their profile in Chatter. Their profile picture has a special moderator banner.



SALES CLOUD

Salesforce for Outlook Enhancements

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

Summer '11 includes the following enhancements for Salesforce for Outlook.

Sync Enhancements



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

You can now sync single tasks between Salesforce and Outlook, which syncs tasks based on their due dates rather than their start dates. Additionally, you can now sync events with locations up to 255 characters. We increased this limit from 80 characters.

Configuration Enhancements

Task filters are editable in Salesforce for Outlook configurations. Here's how they work:

- **TODAY**—Syncs tasks that are due on or after today.
- **LAST MONTH**—Syncs tasks that were due on or after the first day of last month.
- **LAST N DAYS**—Syncs tasks that were due on or after a specified number of days ago, such as **LAST 30 DAYS**. The maximum number allowed is 180.

For event filters, the maximum number allowed for **LAST N DAYS** is now 180. We increased this limit from 80.



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

Salesforce for Outlook now supports single sign-on (SSO). We support both delegated authentication and Security Assertion Markup Language (SAML) requirements.

Email Enhancements



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

The Date column in the email queue now displays the original date of the email from Outlook instead of the date when you added the email to Salesforce.

Usability Enhancements

You can now access your unresolved items from either the sidebar shortcut **Unresolved Items** or the links on the home page for your unresolved emails, events, and tasks.

Updated Video Demo

We updated the video demo for Salesforce for Outlook.



[Watch a Demo on Using Salesforce for Outlook](#) (2:43 minutes)

Additional Sales Cloud Enhancements

Salesforce CRM Content Enhancements

Available in: Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer Editions
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User Permissions Needed	
To modify Salesforce CRM Content settings:	“Manage Salesforce CRM Content”



[Watch a Demo on File Collaboration in Salesforce](#) (3:34 minutes)

Salesforce CRM Content Workspaces Are Now Called Libraries

Starting with Summer '11, Salesforce CRM Content workspaces are called libraries to make them easier to understand. The workspace functionality hasn't changed, just the name. This change is automatic for existing and new organizations that have Salesforce CRM Content enabled. All instances of “workspace” are replaced with “library” throughout the UI and in the online help. Salesforce CRM Content API object names, like ContentWorkspace, remain unchanged.

Administrators can change the name “library” back to “workspace” or any other name they choose. For more information, see “Renaming Tab and Field Labels” in the Salesforce online help.



Include Chatter Files in Salesforce CRM Content Searches with New Setting

In Summer '11, administrators can enable the ability to search for Chatter files from Salesforce CRM Content using the `Show Chatter files in Salesforce CRM Content` setting. If this option is checked, searches in Salesforce CRM Content include files from Chatter. The search drop-down list on the Content and Libraries tabs, and the filters on the Content tab include **All Files, Chatter Files, and My Chatter Groups**. If this option is not checked, searches in Salesforce CRM Content don't include files from Chatter. The search drop-down list on the Content and Libraries tabs, and the filters on the Content tab include **All Libraries, Personal Library**, and any shared libraries the user is a member of. This setting is off by default. To enable this setting for your organization, click **Your Name** > **Setup** > **Customize** > **Salesforce CRM Content** > **Settings**.

List View Updates


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

In Summer '11, enhanced list views display with the following changes:

- The Printable View link now displays as an icon (🖨).
- The Refresh link now displays as an icon (🔄).
- If Chatter is enabled, click  **Chatter** in the top-right corner to see [feed updates for the list view](#). Click  **List** to toggle back to the list view.

In list views for records with Chatter feed tracking enabled, click  or  in the Action column to follow or stop following a record.



Note: While you can follow activities and knowledge articles in a Chatter feed, the  **Follow** button in the Action column for activity and knowledge article list views is not available.

Activity Reminder Enhancements

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

User Permissions Needed	
To edit tasks:	“Edit Tasks”
To edit events:	“Edit Events”

In Summer '11, we've made these enhancements to the activity reminder popup windows.

- A new `Reminder time` field shows the date and time you wanted the reminder to pop up.
- The `Due Date` for tasks and the `Start Date` for all day events (renamed `Start time`) now show the due date or start time you selected when creating the activity. Previously, they showed when the reminder was scheduled to pop up.
- If you didn't specify a due date for a task, the `Due Date` field now shows `None` instead of showing the reminder date.
- Reminders are sorted first by reminder time—most recent at the top—then by due date. Tasks without due dates specified show first, followed by due dates closest to today's date.

Use the following table to determine what's shown as the task due date or event start time.

Activity Type	If you specified:	The Due Date or Start time shows:
Task	A due date	The date you selected when creating or editing the task.
	No due date	The value <code>None</code> .
Event	An event time	The date and time you selected when creating or editing the event.
	An all day event	The date you selected and the time set in the <code>Start of day</code> field in your Personal Information Settings page.

Event Invitation Enhancements

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

User Permissions Needed

To invite people to an event:	“Edit Events”
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When you invite leads, contacts, or person accounts to an event, each invitee receives an email containing a link to a web page where they can accept or decline the invitation. Based on feedback from Salesforce customers, we removed images with salesforce.com branding from both the email and response web page, for a cleaner look. We also improved the usability of the response web page.

Cloud Scheduler Enhancements

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

User Permissions Needed

To request a meeting:	“Edit Events” AND “Send Email”
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Requesting meetings using Cloud Scheduler is now even more convenient. The **New Meeting Request** button is now available in the Calendar section on the Home tab. This gives you the flexibility to propose a meeting that only involves other Salesforce users, such as an internal team event. If you request a meeting from the Home tab, you can still add contacts, leads, and person accounts as invitees. And you can continue to request a meeting from the Open Activities related list on a contact, lead, or person account detail page. For more information, see “Requesting a Meeting Using Cloud Scheduler” in the Salesforce online help.

We've also made these enhancements.

- On the Home tab, you no longer need to scroll down to the Calendar when you switch between the Scheduled Meetings and Requested Meetings subtabs.
- If an administrator disables the Requested Meetings subtab, the **New Meeting Request** button no longer displays in the Calendar on the Home tab.
- When choosing meeting times in Cloud Scheduler, you can now click only times in the future. Prior to Summer '11, we allowed you to click times in the past even though they weren't valid.
- We updated the Cloud Scheduler video demo for Summer '11.



[Watch a Demo](#) (2:37 minutes)

SERVICE CLOUD

Adding Object Permissions to Salesforce Knowledge Article Types

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

In Summer '11, we've enhanced the permissions for Salesforce Knowledge. The "View Articles" permission and some article actions have been removed; we've replaced them with "Create," "Read," "Edit," and "Delete" object permissions for article types. Instead of "View Permissions," users now need the "Read" permission to access specific article types. Other functionality previously provided by article actions has been replaced by the new permissions or is provided by giving a user the "Manage Articles" permission, which is still required to access the Article Management tab.

The following article actions have been replaced with article type object permissions:

- Assign Articles to Other Articles Managers
- Create Articles
- Delete Articles
- Edit Draft Articles

If your organization implemented Salesforce Knowledge previously, the new article permissions will be applied to existing profiles like this:

- If "View Articles" was enabled previously but "Manage Articles" was not, the "Read," "Create," "Edit," and "Delete" permissions are enabled for each article type. Users can read all articles on the Article tab and submit articles when closing a case through the agent console. However, "Manage Articles" is needed to create, edit, or delete articles on the Article Management tab.
- If both "View Articles" and "Manage Articles" were enabled previously, "Manage Articles" remains enabled, and the "Read," "Create," "Edit," and "Delete" permissions are enabled for each article type. Users with this profile can create, read, edit, and delete all articles from the Article Management tab and can also read articles from the Articles tab. They can also publish, archive, and manage translations for articles, unless you previously limited these actions by assigning them to public groups.
- If neither "View Articles" nor "Manage Articles" was enabled previously, no article type permissions are assigned to the profile. Users with this profile still can't access the Articles or Article Management tabs.

When implementing Salesforce Knowledge, you'll have to determine what sort of access users need to articles and to article management capabilities, and then create user profiles accordingly. Refer to this table for details on permissions associated with Salesforce Knowledge.

Salesforce Knowledge Functionality	Profile Permissions			Article Type-Specific Permissions				Other Article Action
	Manage Salesforce Knowledge	Manage Articles	Manage Knowledge Article Input/Export	Read	Create	Edit	Delete	
Create article type	✓							
Manage article actions	✓							
Create new article from case				✓	✓			
Search articles from case and attach articles to case				✓				
Create new article from answer				✓	✓			
Search for and read articles from Article tab				✓				
Create or edit article from Article Management tab		✓		✓	✓	✓		
Edit draft article from Article Management tab		✓		✓		✓		
Delete article (version or entire) from Article Management tab		✓		✓		✓	✓	
Publish article from Article Management tab		✓		✓	✓	✓	✓	✓
Assign article from Article Management tab		✓		✓		✓		
Edit published or archived article		✓		✓	✓	✓		✓
Archive article from Article Management tab		✓		✓	✓	✓	✓	✓
Submit articles for translation		✓		✓	✓	✓		✓
Delete translated articles		✓		✓		✓	✓	
Publish translated articles		✓		✓	✓	✓	✓	✓
Edit translated articles		✓		✓	✓	✓		✓
Import articles	✓	✓	✓	✓	✓	✓	✓	
Import and export translated articles	✓	✓	✓	✓	✓	✓	✓	



Note: The “View Articles” permission has been removed, so it's no longer included in the Administrative and User Permissions report.

Implementation Tips

- In addition to the permissions and article actions, you must select `Knowledge User` on the user detail page for each Salesforce Knowledge user (with the exception of customer and partner portal users).
- Each time you create a new article type, you'll need to update the object permissions for all profiles that need access to it. By default, no permissions are assigned for newly created article types.
- Partner and customer portal users need the “Read” permission on article type(s) that you want them to access from the portal.

Creating Workflow Rules and Approval Processes for Salesforce Knowledge Article Types

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

In Summer '11, we've added workflow rules and approval processes to article types. Creating workflow rules and approval processes lets your organization automate many of the tasks involved with managing its knowledge base. When implementing Salesforce Knowledge, you can create workflow rules and approval processes for some or all of the article types used by your organization.

Workflow rules let you create email alerts, update fields, or send outbound API messages when some sort of criteria is met by an article. For example, you could create a workflow rule that sends an email alert to the article type owner when a new article is created from a case. Note that tasks are not supported by article type workflow.



Note: Tasks aren't available for article type workflow rules.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you additional control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

Implementation Tips for Article Type Approval Processes

Approvals processes allow your organization to make sure that information is published according to its requirements. The following information is important to understand when setting up article type approval processes.

- Adding an approval process to an article type lets your organization ensure that the required reviewers approve the article before it's published. When an approval process is enabled for an article's article type, the Approval History related list displays on the article details page.
- When creating an approval process, make sure to change the final approval action to “Unlock the record for editing” to allow users to publish the article. See “Final Approval Actions” in the Salesforce online help.
- Articles aren't published automatically at the end of an approval process. Users must click **Publish...** to make the article available in the publishing channel(s).
- When an approval process is associated with an article type, users with the “Manage Articles” permission might see both the **Publish...** and the **Submit for Approval** buttons from an article's detail page (which buttons they see is determined

by both permissions and article actions). These users can publish an article without submitting it for approval. To prevent this from affecting many users, assign the “Publish Articles” article action to a limited group of users instead of giving it to all users with the “Manage Articles” permission. For more information, see “Assigning Article Actions to Public Groups” in the Salesforce online help. You’ll still want to make sure that the users with direct publishing capability know which articles need approval before publication.

- Article approvers require the “Manage Articles” permission and at least the “Read” permission on the article type associated with articles they review. These permissions let them access the article in a draft state. Without these permissions, approvers can reassign but not approve articles.
- Workflow rules and approval processes apply to the “Draft to Publication” portion of the article publishing cycle. Approval processes aren’t available for translation or archiving.

Creating Workflow Rules for Article Types

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

User Permissions Needed	
To view workflow rules and approval processes:	“View Setup and Configuration”
To create or change workflow rules and approval processes:	“Customize Application”

To create a workflow rule:

1. Click **Your Name** ► **Create** ► **Workflow & Approvals** ► **Workflow Rules** to access the workflow rules list page.
2. On the workflow rules list page, click **New Rule**.
3. Select the article type from the `Select object` drop-down list.
4. Click **Next**.
5. Enter a rule name. Optionally, enter a description for the rule.
6. Select the evaluation criteria.
7. Choose criteria are met
8. Enter criteria for the rule.
9. Click **Save & Next**.
10. Click **Add Workflow Action** and select the type of action for the rule.
11. Enter information required by the action.
12. Click **Save**.
13. Optionally, add a time-dependent workflow action by clicking **Add Time Trigger**.
14. Provide time trigger information and then click **Save**.
15. Click **Done**.



Note: Tasks aren't available for article type workflow rules.

For more information about creating workflow rules, see “Creating Workflow Rules” in the Salesforce online help.

Creating Approval Processes for Article Types

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

User Permissions Needed	
To view workflow rules and approval processes:	“View Setup and Configuration”
To create or change workflow rules and approval processes:	“Customize Application”

The following is an overview of the steps involved in creating an approval process. For detailed instructions, see “Creating Approval Processes” in the Salesforce online help.

1. Choose the Approval Process Wizard. Two wizards are available to help you through the approval set up process. Choose the one that better meets your requirements. See “Choosing an Approval Process Wizard” in the Salesforce online help for more information.
2. Provide a name, unique name, and description for the process.
3. Specify criteria for entering the process. For example, you could specify that if the article will be published in the customer portal it requires approval: `Visible in Customer Portal equals True`.
4. Specify approvers for the process. You can allow the submitter to choose an approver, or have the process assign an approver based on your organization's role hierarchy, or to an approval queue, or to a specific user or set of users. For example, you could specify that articles that appear in the customer portal require review by a member of the legal department.



Note: Although the Jump Start Wizard gives you the option to assign approval requests to a queue, queues aren't available for article types.

5. Select the email template that the process will use to notify approvers. When an approval process assigns an approval request to a user, Salesforce automatically sends the user an approval request email. The email contains a link to the approval page in Salesforce, where the user can approve or reject the request and add comments.
6. Configure the approval request page layout. The approver approves or rejects the article from this page. You can add as many fields to this page as you think your users will need to reasonably assess an article's content. For example, you might choose to include information such as a summary of the article's content, the product discussed, and the author's name.
7. Specify which users are allowed to submit articles for approval. For example, for articles that require editing before approval, you could create a public group containing editors, and then specify that only members of that group can submit articles for approval.
8. Activate the approval process.

Custom Sidebar Components for the Service Cloud Console

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

Custom console components let you customize, extend, or integrate the sidebars of the Service Cloud console using Visualforce. Visualforce uses a tag-based markup language to give developers a more powerful way to build applications and customize the Salesforce user interface.

For example, you might want to create custom console components that:

- Show registered products on accounts or contacts
- Display the location of contacts on Google maps
- List new cases on accounts or contacts
- Display the next milestones on cases
- Show similar cases on each case

You can use the Service Cloud Console Integration Toolkit to build custom console components. The toolkit is an API that uses browsers as clients to display pages as tabs in the console. It provides you with programmatic access to the console so that you can extend it to meet your business needs. For example, you can use the toolkit to open and close tabs in the console to streamline a business process. In addition to this, custom console components can:

- Display content in sidebars instead of tabs
- Display information without users having to click a button or link
- Display automatically when users view specific pages
- Show contextual information alongside records
- Show small amounts of information on pages

For more information (English only) about the toolkit, see the [Service Cloud Console Integration Toolkit Developer's Guide](#).

Creating a custom console component typically involves these steps:

1. Developers create a Visualforce page.
2. Administrators add the Visualforce page to page layouts via a lookup field.
3. Administrators determine the width and location of the component in the console from page layouts.
4. Users view the component when they access page layouts in the Service Cloud console.

Implementation Tips

- Only users assigned to the Service Cloud User feature license can add custom console components to page layouts. See “Viewing Feature Licenses” in the Salesforce online help.
- Custom console components don't refresh automatically when users update records on primary tabs or subtabs.
- You can't delete Visualforce pages that are assigned to page layouts as custom console components.
- You can use a Visualforce page as a component once for each page layout.
- Two URL parameter values are passed automatically to Visualforce pages used as custom console components:

Parameter Name	Parameter Value	Description
id	A case-sensitive 15-character alphanumeric string that uniquely identifies a record.	The ID of the detail page in which the component displays. This parameter is only passed if the ID is available.
inContextPane	true	Indicates the Visualforce page displays as a component in the Service Cloud console.

Best Practices

- If Salesforce Knowledge is enabled and the Knowledge sidebar is turned on, we recommend that you don't add a custom console component to the Right Sidebar of the console on case page layouts. This is because the Knowledge sidebar automatically displays over components in such cases.
- If you change the `Height` or `Width` of a custom console component, we recommend that you refresh your browser before you view your updates.
- If you add `showHeader=true` to a Visualforce page, you can add a 15-pixel gap to the right and left sides of a custom console component to visually indicate its location in a sidebar. For example, `<apex:page> standardController="Contact" showHeader="false" title="List of Cases">`.


Adding Custom Console Components

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

User Permissions Needed	
To add custom console components:	"Customize Application"
To create Visualforce pages:	"Customize Application"

After you create a custom console component (Visualforce page), you can add it to page layouts so that users can access it as a component from a sidebar in the Service Cloud console.

To add a custom console component to page layouts:

1. For standard objects, click **Your Name** ► **Setup** ► **Customize** ► **Object** ► **Page Layouts**.
For custom objects, click **Your Name** ► **Setup** ► **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 component, type the name of the Visualforce page, or click  to find and select the Visualforce page.
5. Enter the height or width of the component as it should display in the console.
6. Click **Save**.

Additional Service Cloud Enhancements

Custom Console Layouts

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

User Permissions Needed

To customize page layouts: "Customize Application"

The highlights panel is a table of up to four columns at the top of every primary tab in the Service Cloud console. It lets you view key information at a glance. The interaction log is an area where you can write notes on records that appear in the console. It lets you jot down your thoughts without clicking a button, viewing a new tab, or scrolling to a related list. With Summer '11, you can turn off the highlights panel or interaction log on page layouts so that you can have more screen real estate.

To turn off highlights panels:

1. For standard objects, click *Your Name* > **Setup** > **Customize** > *Object* > **Page Layouts**.
For custom objects, click *Your Name* > **Setup** > **Create** > **Objects**, then choose the object.
2. Click **Edit** next to a page layout.
3. Click **Layout Properties**.
4. Deselect `Highlights Panel` and click **OK**.
5. Click **Save**.

To turn off interaction logs:

1. For standard objects, click *Your Name* > **Setup** > **Customize** > *Object* > **Page Layouts**.
For custom objects, click *Your Name* > **Setup** > **Create** > **Objects**, then choose the object.
2. Click **Edit** next to a page layout.
3. Click **Layout Properties**.
4. Deselect `Interaction Log` and click **OK**.
5. Click **Save**.

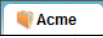

For more information, see “Customizing Highlights Panels” and “Setting Up Interaction Logs” in the Salesforce online help.

Streamlined Tab Names for the Service Cloud Console

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

Unlike standard Salesforce pages, all items you click in the Service Cloud console display as tabs. Tabs let you:


- Find, update, and create records
- Review and update records from lists
- Display all the information you need on one screen without losing context

Now, only the tab name and icon display  (Acme). Previously, the name and record type displayed  (Account: Acme).

For more information, see “Using the Service Cloud Console” in the Salesforce online help.

Refreshing Tabs in the Service Cloud Console

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

Unlike standard Salesforce pages, all items you click in the Service Cloud console display as tabs. Now, you can refresh the console's tabs to view recent updates. Just click  and select **Refresh all primary tabs** or **Refresh all subtabs**.

For more information, see “Working with Tabs in the Service Cloud Console” in the Salesforce online help.

New Methods for the Service Cloud Console Integration Toolkit

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

The Service Cloud Console Integration Toolkit is an API that uses browsers as clients to display pages as tabs in the console. It provides advanced administrators and developers with programmatic access to the console so that they can extend it to meet your business needs. For example, developers can use the toolkit to open and close tabs in the console to streamline a business process.

With Summer '11, the following new methods are available.

Method	Description
<code>focusPrimaryTabById()</code>	Focuses the browser on a primary tab that is already open with the specified ID.
<code>focusPrimaryTabByName()</code>	Focuses the browser on a primary tab that is already open with the specified name.
<code>focusSubtabById()</code>	Focuses the browser on a subtab that is already open with the specified ID.
<code>focusSubtabByNameAndPrimaryTabId()</code>	Focuses the browser on a subtab that is already open with the specified name and primary tab ID.
<code>focusSubtabByNameAndPrimaryTabName()</code>	Focuses the browser on a subtab that is already open with the specified name and primary tab name.
<code>isInConsole()</code>	Determines if the page is in the Service Cloud console.
<code>openSubtabByPrimaryTabName()</code>	Opens a new subtab (within a primary tab) that displays the content of a specified URL, which can be relative or absolute. You can also override an existing subtab. Use to open a new subtab on a primary tab via the primary tab's name.
<code>refreshPrimaryTabById()</code>	Refreshes a primary tab specified by ID, including its subtabs. This method can't refresh subtabs with URLs to external pages or Visualforce pages.
<code>refreshPrimaryTabByName()</code>	Refreshes a primary tab specified by name, including its subtabs. This method can't refresh subtabs with URLs to external pages or Visualforce pages.

Method	Description
<code>refreshSubtabById()</code>	Refreshes a subtab with the last known URL with a specified ID. This method can't refresh a subtab If the last known URL is an external page or a Visualforce page.
<code>refreshSubtabByNameAndPrimaryTabId()</code>	Refreshes a subtab with the last known URL with the specified name and primary tab ID. This method can't refresh a subtab If the last known URL is an external page or a Visualforce page.
<code>refreshSubtabByNameAndPrimaryTabName()</code>	Refreshes a subtab with the last known URL with the specified name and primary tab name. This method can't refresh a subtab If the last known URL is an external page or a Visualforce page.

For more information (English only) about the toolkit, see the [Service Cloud Console Integration Toolkit Developer's Guide](#).



Note: Now, the version of the *Service Cloud Console Integration Toolkit Developer's Guide* matches the current version of the API. For example, if the current version of the API is 22.0, then the version of the developer's guide is 22.0.

Case Milestone Custom Layouts

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

User Permissions Needed	
To change the page layout for case milestone detail pages:	“Manage Entitlements” AND “Customize Application”

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include first response and resolution times on cases. Milestones are available if you've enabled entitlement management.

When you're working with a case, its milestones appear in the Case Milestones related list. Users can click a milestone to display its detail page. Previously, you couldn't change the information displayed on the page. With Summer '11, you can control which fields appear. For example, you can hide fields that are irrelevant to your business processes.

To change the layout for the Case Milestone Detail page:

1. Click **Your Name** ► **Setup** ► **Customize** ► **Cases** ► **Case Milestones** ► **Page Layouts** ► **Edit**.
2. Drag fields on or off the page.
3. Click **Properties** to make a field required or optional.
4. Click **Save**.

For more information, see “Using the Case Milestones Related List” in the Salesforce online help, “Customizing Page Layouts” in the Salesforce online help, and “Customizing Page Layouts with the Enhanced Page Layout Editor” in the Salesforce online help.

Updated Public Knowledge Base Package on the AppExchange

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

User Permissions Needed

To install and customize the public knowledge base: “Customize Application”

Salesforce.com provides a package on the AppExchange so you can set up a public knowledge base that customers can browse anonymously without having to authenticate as registered users. This unmanaged package includes Visualforce pages that you can customize based on the needs of your organization. With Summer '11, this package is updated to support multiple language articles in Salesforce Knowledge.

You can find this public knowledge base package at:

<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001gFH9EAM>

Searching Article Attachments



You asked for it! This enhancement is from an [idea](#) on the IdeaExchange.

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

With Summer '11, the text contents of files attached to Salesforce Knowledge articles are searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5MB file attachments, the first 4.16 MB of each file is searchable..

Attaching Translated Articles to Cases

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

User Permissions Needed

To view articles in the Articles tab or Articles related list: “Read” on the article type

From the Articles related list on a case, you can search for Salesforce Knowledge articles that can help you solve the case. Previously, if your organization translated articles, you could search for articles by language, but were only able to attach the version of the article published in the master language. With Summer '11, we've enhanced translated case article functionality. If your organization translates articles, you can add a translated version of an article to a case.

To search for an article:

1. On the case detail page, click **Find Articles** from the Articles related list. The case subject is used automatically as a search term to provide an initial list of search results.
2. In the sidebar of the Articles page, narrow your search results by article type or category. Use the Article Language filter to search for articles by language.
3. When you find an article that's relevant to the case, select the article's checkbox and then click **Attach to Case** or **Attach and Go to Case**.

To support this enhancement, we've added a Language field to the Articles related list on the Case Detail page. Your administrator will need to add the Language field to the related list if your organization plans to associate translated articles with cases.

We've also added the Language field to the Cases with Articles report. Now, you can use the report to understand which cases have translated articles associated with them and sort or filter your search results by article language.

Advanced Article Reporting

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

User Permissions Needed	
To report on articles and translations:	“Manage Articles” AND “Create,” “Read,” “Edit,” and “Delete” on the article type

With Summer '11, you can report on your Salesforce Knowledge article types, custom fields used on your article types, article translations, and the publication status of your articles and translations. For example, you can create custom report types with the new primary object `Knowledge Article Version` to display all your articles and their translations with their status and view and vote statistics.

To make this possible, the following fields were adding to article reports:

- Is Master Language—Indicates that the article is not a translation, but the original article.
- Knowledge Article Version ID—Unique ID automatically assigned to the article translation.
- Master Language—The original language of the article.
- Out of Date—Indicates that the master article has been updated since this translation was published.
- Publication Status—Indicates whether the article or translation is in progress (draft), published, or archived.
- Translation Completed Date—Date the translation was completed.
- Translation Exported Date—Date the article was exported for translation.
- Translation Imported Date—Date the translation was imported.

For information on creating Salesforce Knowledge reports, see [Reporting on Articles](#).

Salesforce Knowledge Enhancements

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

With Summer '11, working with Salesforce Knowledge is easier with the following enhancements:

- The Related Links area on the Article Management tab, takes you directly to the export and import translation pages in the Setup area. For example, to get to the Export Articles For Translation page from the Article Management tab, simply click **Export Articles For Translation**, instead of clicking *Your Name* ► **Setup** ► **Data Management** ► **Export Articles For Translation**.
- When viewing published articles on the Article Management tab, scrolling over the translation status icon provides an overlay with translation status for each language separated on two tabs: draft translations and published translations.
- When editing or viewing an article, you can now see the article's audience, master language and the translated languages.

ANALYTICS

Analytics Enhancements

Salesforce analytics enhancements in Summer '11 include:

- [Announcing the Salesforce Mobile Dashboards iPad App](#)
- [Additional Products Available for Purchase](#)
- [Report Builder Preview Loading](#)
- [Multiple Field Selection in Report Builder](#)
- [Report Builder Filter Pane Improvements](#)
- [Visible Report Builder Profile Permissions](#)
- [Dashboard Component Snapshot Posting to Group Feeds](#)
- [No More Dynamic Dashboards “Lost” in Personal Folders](#)
- [Updated Video Tutorials for Report Builder](#)
- [New Tip Sheet for PARENTGROUPVAL and PREVGROUPVAL Summary Functions](#)
- [Improved FAQ for Reports and Dashboards](#)

Announcing the Salesforce Mobile Dashboards iPad App

Available in **Unlimited** and **Enterprise** Editions

Now you can access your Salesforce dashboards from your iPad! Salesforce Mobile Dashboards keeps you in touch with your organization's data, performance, and trends, whether you're in the office or on the road.

Use this app to:

- Browse recent dashboards, or ones you're following
- Search for dashboards
- View any dashboard you have access to
- Tap to view individual dashboard components
- Interact with components to see values
- Email a dashboard or an individual component

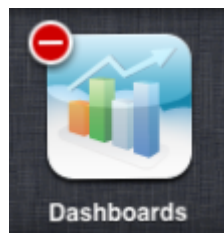


You can download [Salesforce Mobile Dashboards](#) from the iTunes App Store. The iPad app is supported on first generation and second generation models running iOS 4.2 or higher. Sign in with your email and password. If you don't have a login, you can tap **Demo** to view sample dashboards. To connect, all you need is an active Internet connection. If your organization requires it, you may need to use VPN.

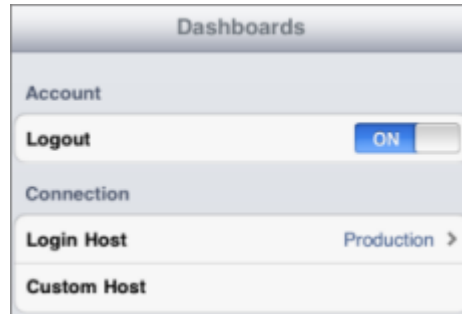
To fully sign out of the app, end the active app session and then logout. To sign in after viewing the demo, you only need to end the active app session.

To end the session and sign out:

1. Press the Home key twice to view running apps.
2. Tap and hold **Dashboards**, then tap the icon to end the active session.



3. Go to **Settings** ► **Apps** ► **Dashboards**.
4. Slide the **Logout** setting to **ON**.



Additional Products Available for Purchase



You asked for it! Summer '11 addresses these ideas on IdeaExchange to make additional analytics products available: [allow more scheduled dashboards](#) and [allow more dynamic dashboards](#).

You may be able to purchase the following additional analytics products for your organization:

- Dynamic Dashboards
- Scheduled Reports
- Scheduled Dashboards
- Scheduled Analytic Snapshots

Contact your salesforce.com representative for information.

Report Builder Preview Loading

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



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

The report builder preview loads more quickly than ever! With asynchronous loading, you can continue to make changes to your report while the preview loads. For example, drag multiple fields into the report and then create a grouping while those columns load.



Note: Asynchronous loading isn't available for matrix reports.

You can continue working in the report preview while the following actions occur:

- Add, remove, or reorder fields
- Add or remove summary fields
- Add, remove, or reorder groupings
- Remove formulas



Note: If you remove a summary field or formula used in a chart, the chart reloads, but the report preview loads asynchronously.

You can't work in the report preview while the following actions occur:

- Add or edit formulas
- Remove a report's only grouping
- Remove a column used to limit the row count for a tabular report
- Sort the report by group or column
- Update standard or custom filters
- Change report format
- Show or hide report details
- Add or remove a chart
- Add or remove conditional highlighting
- Change **Group Dates By**
- Change a converted currency field
- Save the report

Multiple Field Selection in Report Builder

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



You asked for it! Summer '11 addresses these ideas on IdeaExchange for multiple field selection in the report builder: [add and remove multiple columns](#) and [remove multiple fields](#).

Editing reports just got a lot easier. In report builder, you can select multiple fields at once to add, remove, or reorder. For example, you can add `Created By`, `Type` and `Opportunity Name` to your report at the same time. Just press CTRL (Windows) or Command (Mac) while selecting.



Note:

- When adding multiple fields, they appear in the report in the order selected.
- For summary and tabular formats, disable **Show ► Details** when adding multiple summarizable fields to a report. The Summarize dialog automatically appears, letting you select summaries for all the fields at once.
- Enable **Show ► Details** when adding non-summary fields, such as text fields to a report.

Report Builder Filter Pane Improvements

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

We made a few improvements to the Filters pane in the report builder:

Remove Filter Logic

It's easy to remove filter logic with the new **Remove** button, which appears when editing.

Filters Add ▾

Show My accounts ▾

Date Field Created Date ▾ Range All Time ▾ From [] To []

Filter Logic (1 AND 2) OR (1 AND 3) ? OK Cancel **Remove**

1. Account Owner equals "John Smith" Edit Remove
2. Industry equals "Engineering" Edit Remove
3. Created Date equals "4/1/2011" Edit Remove

Calendar Date Selectors

Now you can click and choose dates for date field filters using the calendar tool.

Filters Add ▾

Show My accounts ▾

Date Field Created Date ▾ Range All Time ▾ From [] To []

Filter Logic: (1 AND 2) OR (1 AND 3)

1. Account Owner equals "John Smith"
2. Industry equals "Engineering"

Created Date ▾ equals ▾ 4/1/2011 [] OK Cancel

April 2011

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Today

Sticky Filters Pane Size

Now, when you resize the Filters pane, it stays where you left it the next time you log in.

Visible Report Builder Profile Permissions

When you upgrade to the new Report Builder, released in Spring '11, you may continue to see the "Report Builder" permission in profiles and the Profile object in the API, though the upgrade overrides those settings. See "Upgrading Report Builder" in the Salesforce online help.

Dashboard Component Snapshot Posting to Group Feeds

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

In addition to posting snapshots to dashboard and user feeds, you can now post them to group feeds!

A snapshot is a static image of a dashboard component at a specific point in time posted to a Chatter feed. Post a component snapshot to a user or group feed to share and comment on that component. For example, post a snapshot of this month's sales to your team.

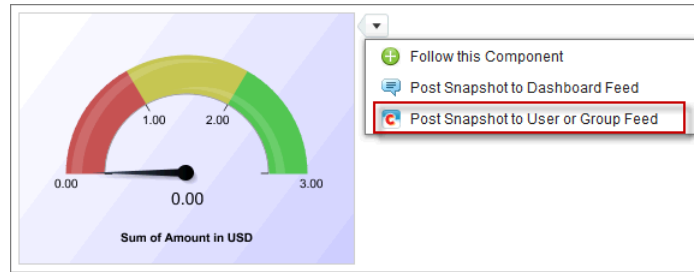



Figure 3: Updated Dashboard Component Hover Menu

To enable snapshots for your organization, click **Your Name** > **Setup** > **Customize** > **Reports & Dashboards**, then select the **Enable Dashboard Component Snapshots** option. See “Customizing Report and Dashboard User Interface Settings” in the Salesforce online help.

To post a snapshot to a group feed:

1. Hover over a component to display the  menu. To clear the hover menu, click an empty part of the screen.
2. Click **Post Snapshot to User or Group Feed**.
3. Click **Group Feed**.
4. Type a group name into the address field.
5. Write a comment in the text box and click **OK**. The snapshot and comment immediately appear in the feed.



Important: Posting a snapshot to a user or group feed makes it potentially visible to the entire organization:

- Posting to a user feed makes the snapshot public. Anyone who views that user's profile can see it.
- Posting to a public group makes the snapshot public. Anyone who views your profile or the group feed can see it.
- Posting to a private group shows the snapshot to all group members.

People can see it whether they have access to the dashboard or not. Make sure the component doesn't contain sensitive information!

No More Dynamic Dashboards “Lost” in Personal Folders

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



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

Previously, users with the right permissions could save dynamic dashboards to their personal folders. This made shared access impossible for that dashboard, which rendered the dashboard useless, but counted against your limit. Now, we no longer allow anyone to save a dynamic dashboard to a personal folder. No more lost dynamic dashboards!

Updated Video Tutorials for Report Builder

We've updated the following report builder videos to reflect the latest features and interface:

- [Getting Started with Report Builder](#) (2:34 minutes)
- [Building Matrix Reports](#) (2:00 minutes)

New Tip Sheet for PARENTGROUPVAL and PREVGROUPVAL Summary Functions

We've created a new tip sheet that explains the benefits of these powerful summary functions for report custom summary formulas. See [Report Formula Summary Functions](#).

Improved FAQ for Reports and Dashboards

We've updated the Frequently Asked Questions for reports and dashboards with new topics. See the following topics in the Salesforce online help:

- [Reporting FAQ](#)
- [Dashboards FAQ](#)

JIGSAW

Jigsaw — Generally Available

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



[Watch a Demo](#) (3:18 minutes)

Jigsaw is a leading provider of business information and data services that leverages crowd-sourced content contributed by its global business-to-business community of over 1.6 million members. Jigsaw has tens of millions of up-to-date business contacts.

Now, with the Summer '11 release, you can search for Jigsaw accounts and contacts. You can add as many account records as you like to Salesforce, and if you have a Jigsaw license, you can also add contacts and leads. It's remarkably easy to find the accounts and contacts you need, and using Jigsaw is a great way to quickly expand your sales network.

The screenshot shows the Jigsaw search interface. On the left, there are filters for Options, Company Name, Department, and Level. The main area has search fields for Company or Website, Name or Email, Location, Industry, and Sub-industry. Below the search fields is a table of results with columns for Name, Company, Title, City, State, Country, and Updated. The table lists five contacts from Salesforce.com, Inc.

Name	Company	Title	City	State	Country	Updated
Stern, Gabriel gstern@salesforce.com +1.212.389.6591	Salesforce.com, Inc.	Corporate Counsel in Finance	New York	NY	United St	Last 6 Months
Turkel, Adam aturkel@salesforce.com +1.646.346.8906	Salesforce.com, Inc.	Corporate Counsel in Finance	New York	NY	United St	Last 6 Months
Hayward, Benjamin blee@salesforce.com +1.510.627.1105	Salesforce.com, Inc.	Commercial Real Estate Ma in Finance	Oakland	CA	United St	> 1 Year
Lukens, Jim jlukens@salesforce.com +1.415.901.7000	Salesforce.com, Inc.	Senior Manager in Finance	San Francisco	CA	United St	Last 6 Months
Gilmour, Stephanie sgilmour@salesforce.com +1.415.901.5122	Salesforce.com, Inc.	Senior Manager, Sales Tech in Finance	San Francisco	CA	United St	Last 3 Months

Go to the Jigsaw tab to search for accounts. Generate a broad list based on criteria like company name, industry, and location. Then use filters to narrow your results based on number of employees, revenue, and more.

Need contacts? After purchasing a Jigsaw license, you can add them for a specific account, starting from the account record. Your search automatically includes the company's web site, but you can add criteria like name or email, location, and more on the Jigsaw tab. Filters like department and title make it easy to narrow your results and get a list you can work. Use phone or email to make connections right away, or add the records to Salesforce as contacts or leads.

To maintain the accuracy of your CRM records in Salesforce, use Jigsaw's Clean feature, which is part of the Jigsaw for Salesforce AppExchange package. Clean works on all your Salesforce account, contact, and lead records—whether they were added from Jigsaw or not. To get Jigsaw Clean:

- If you're a new Jigsaw for Salesforce user, download and install the Jigsaw for Salesforce AppExchange package and configure Salesforce to use its Clean features. For complete instructions, see [Implementing Jigsaw Clean for Accounts, Contacts, and Leads](#).
- If you're already using the Jigsaw for Salesforce AppExchange package, you have its Clean features as well as the ability to search for and add contacts. To access the functionality in the new Summer '11 release, you need to go through an upgrade process. You should contact Jigsaw Support or your customer success manager (CSM) to discuss this new license.

Jigsaw Clean is available in Developer, Enterprise, Professional, and Unlimited editions.

Implementation Tips

- Everyone using supported Salesforce editions can search for Jigsaw CRM records. The Free version of Jigsaw provides Jigsaw data to *all* users, but you need to implement the Paid version of Jigsaw to get complete contact and lead data.

Implementing Jigsaw

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

User Permissions Needed	
To implement Jigsaw:	“Customize Application”
To enable Jigsaw users:	“Manage Users”

Implementing Jigsaw is easy. Here's what you need to know.

The free version of Jigsaw provides Jigsaw data to all users. Users can find the Jigsaw tab on the All Tabs page, or you can add it add it for them.

With the free version, users can:

- Search for and add unlimited Jigsaw account records to Salesforce.
- Search for unlimited Jigsaw contacts. Contacts permissions are not required.

Free version users can't see phone and email information for contacts, and they can't add contact or lead records to Salesforce. To take full advantage of Jigsaw's contact data, your organization needs to purchase Jigsaw licenses and set up the feature.

To implement Jigsaw, you need to:

- [Understand Jigsaw licenses and limits](#)
- [Enable users for Jigsaw and assign contact and lead addition limits](#)
- Add the Jigsaw tab to user profiles
- Add the **Get Jigsaw Contacts** button to your accounts page layouts
- [Install and set up the Clean features in Jigsaw for Salesforce](#).
- “Install the Jigsaw Reports AppExchange package” in the Salesforce online help



Important: Follow these best practices for your Jigsaw implementation.

- If a user adds more than 200 leads to Salesforce at one time, any lead assignment rules your organization uses won't run. To make sure your lead assignment rules run, instruct your users to limit their additions to fewer than 200 leads at any time.
- If your organization uses validation rules on fields that are mapped to Jigsaw, either deactivate the rules or make sure they match Jigsaw field names to avoid errors when you add records. For example, if you have a validation rule for the contact object's Home Phone field, you should create a custom field called Phone on the contact object and use that field with your validation rule because the Jigsaw field is Phone.


Understanding Jigsaw Licenses and Limits

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

The Jigsaw Licenses & Limits page identifies the number of user licenses you have and the limits per user and for your organization. Assign monthly contact and lead additions for each user on their User Edit page.

Licenses

Jigsaw user licenses let users search Jigsaw for accounts and contacts, and add them as records to Salesforce. Users can also add contacts as leads.


Field	Definition
Jigsaw User Licenses	The number of user licenses your organization has purchased from Salesforce.
Assigned Jigsaw User Licenses	<p>The number of Jigsaw user licenses you've assigned. A single Jigsaw license is assigned every time you enable a user for Jigsaw.</p> <p> Tip: To see which users have been enabled, check the All Jigsaw Users page. Click <i>Your Name</i> > Setup > Jigsaw Administration > Jigsaw > Users.</p>

Account Record Limits

Salesforce users can add unlimited Jigsaw account records to Salesforce.

Contact and Lead Record Limits

You need to purchase Jigsaw licenses to add contact and lead records to Salesforce.

Field	Definition
Monthly Limit per User License	<p>The number of contact and lead records a single Jigsaw user license allows.</p> <p>The default number of records per license is 300, but it can be adjusted based on your agreement. Additions expire at the end of each month, as determined by your organization's default time zone.</p>
Monthly Organization Limit	<p>The total number of contact and lead records <i>your organization</i> can add each month.</p> <p>This limit is calculated by multiplying the number of Jigsaw user licenses you have by the monthly limit per user license.</p> <p>Typically, you distribute record limits among a number of users within your organization, but you can also assign them all to a single user.</p>
Balance	<p>The number of contact and lead records Jigsaw users can still add during the current month. The balance is updated every time a user adds contact or lead records to Salesforce.</p> <p> Tip: To see how many records each user has added, check the All Jigsaw Users page. Click Your Name ► Setup ► Jigsaw Administration ► Jigsaw ► Users.</p>

Here's an example of how one organization manages Jigsaw licenses and limits. The sales division of Universal Telco has 12 sales reps and two marketing reps, and they purchase 20 Jigsaw licenses, each of which has a monthly addition limit of 300. This means that Jigsaw users within the organization can add as many as 6,000 contacts and leads per month. The Universal Telco administrator distributes the users' monthly contact and lead record addition limits as follows.

- Ten of the sales reps have limits of 300 each.
- The remaining two sales reps have limits of 500 each.
- The two marketing reps have a limit of 1,000 each.

Setting Up Jigsaw Users

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

User Permissions Needed	
To implement Jigsaw:	“Customize Application”
To enable Jigsaw users:	“Manage Users”

Enable each Jigsaw user on his or her User Edit page. To view a list of all Jigsaw users, and edit user records, go to the All Jigsaw Users page.

1. Click **Your Name** ► **Setup** ► **Manage Users** ► **Users**, then click **Edit** next to the name of the user you want to enable.
2. Select the **Jigsaw User** checkbox.
3. From the **Monthly Jigsaw Contact and Lead Addition Limit** drop-down, select the number of contact and lead records the user can add each month. You can select up to the organization limit for any user or all users, but once the organization's monthly limit is reached, users won't be able to add more records.
For example, if your organization's monthly addition limit is 3000 records, you might assign one user a monthly addition limit of 500 records, another user a limit of 1,000 records, and another user the organization limit (in this case 3,000 records). If the second user adds all 1,000 of his records right away, the third user will only be able to add up to 2,000 records, and depending on how many the third user adds, the first user may not be able to add any records.



Tip: You can find your organization's monthly organization addition limit on the Jigsaw Licenses & Limits page. Click **Your Name** ► **Setup** ► **Jigsaw Administration** ► **Jigsaw** ► **Licenses & Limits**.

4. Click **Save** to save the current record, or **Save and New** if you want to enable other users for Jigsaw.

Implementing Clean Features from Jigsaw for Salesforce

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

User Permissions Needed	
To implement Jigsaw Clean:	“Customize Application”

If you're using Jigsaw in Salesforce and need to get automated updates for to your account, contact, and lead records, use the Clean features from Jigsaw for Salesforce, Jigsaw's companion AppExchange package. For complete instructions, see [Implementing Jigsaw Clean for Accounts, Contacts, and Leads](#).

Configuring Jigsaw for Salesforce to Support Salesforce Jigsaw Features

Available in: Developer , Enterprise , Professional , and Unlimited Editions
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User Permissions Needed	
To configure Jigsaw for Salesforce:	“Customize Application”

If you're already using the Jigsaw for Salesforce AppExchange package, you have its Clean features as well as the ability to search for and add contacts. To access the functionality in the new Summer '11 release, you need to go through an upgrade process. You should contact Jigsaw Support or your customer success manager (CSM) to discuss this new license.

Enhanced Profile User Interface

Available in: **Enterprise, Unlimited, Developer, and Database.com** Editions

In Summer '11, the enhanced profile user interface is generally available. The enhanced profile user interface provides a streamlined experience for managing profiles. With it, you can easily navigate, search, and modify settings for a profile.



Note: You can't use the enhanced profile user interface if:

- You use Microsoft® Internet Explorer® 6 or earlier to manage your profiles (unless you've installed the Google Chrome Frame plug-in for Internet Explorer).
- Your organization has defined category groups on the guest profiles used for sites.
- Your organization delegates partner portal administration to portal users.

Implementation Tips

- To enable the enhanced profile user interface, click **Your Name** > **Setup** > **Customize** > **User Interface**, then select **Enable Enhanced Profile User Interface**.
- To use the enhanced profile user interface with Internet Explorer 6, install and run the Google Chrome Frame plug-in for Internet Explorer.

Best Practices

- You can easily find an object, permission, or setting from any profile page: In the **Find Settings...** box, type at least three consecutive letters of an object, tab, permission, or setting name, then select from the list of items that appears.

To view or edit an object setting, save a few clicks by using the **Find Settings...** box. This is quicker than going from the profile overview page to the object and tabs page to the object detail page.

- You can use enhanced profile list views to change permissions in multiple profiles. For more information, see “Editing Profiles Using Profile Lists” in the Salesforce online help.
- To quickly view a summary of object permissions, the number of fields per object, tab settings, and assigned page layouts, go to the Objects and Tabs summary page. To do this from any profile page, type `obj` in the **Find Settings...** box and select **Objects and Tabs**.

Working in the Enhanced Profile User Interface Overview Page

Available in: **Enterprise, Unlimited, Developer**, and **Database.com** Editions

Assigned apps, standard objects, tabs, and Visualforce are not available in **Database.com**

User Permissions Needed	
To view profiles:	“View Setup and Configuration”
To delete profiles and edit profile properties:	“Manage Users”

In the enhanced profile user interface, the profile overview page provides an entry point for all of the settings and permissions for a single profile. To open the profile overview page, click **Your Name** ► **Setup** ► **Manage Users** ► **Profiles** and click the profile you want to view.

From the profile overview page, you can:

- [Search for an object, permission, or setting](#)
- [Clone the profile](#)
- If it's a custom profile that's not assigned to any users, delete the profile by clicking **Delete**
- Change the profile name or description by clicking **Edit Properties**
- [View a list of users who are assigned to the profile](#)
- Click any of the following links to view or edit permissions and settings:
 - [Assigned Apps](#)
 - [Objects and Tabs](#)
 - [App Permissions](#)
 - [Apex Class Access](#)
 - [Visualforce Page Access](#)
 - [System Permissions](#)
 - [Desktop Client Access](#)
 - [Login Hours](#)
 - [Login IP Ranges](#)
 - [Service Providers \(if Salesforce is enabled as an identity provider\)](#)

Searching in the Enhanced Profile User Interface

Available in: **Enterprise, Unlimited, Developer,** and **Database.com** Editions

The following items don't appear in searches when using the enhanced profile user interface with **Database.com**: standard objects, assigned apps, tabs, Visualforce page access settings, and desktop client access settings.

User Permissions Needed

To find permissions and settings in a profile:	“View Setup and Configuration”
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On any of the profile pages, type at least three consecutive letters of an object, tab, permission, or setting name in the **Find Settings...** box. The search terms aren't case-sensitive. As you type, suggestions for results that match your search terms appear in a list. Click an item in the list to go to its settings page.

You can search for:

Item	Example
Assigned apps	Type <code>sales</code> in the Find Settings box, then select <code>Sales</code> from the list.
Objects	Type <code>Acco</code> , then select <code>Accounts</code> .
Fields (Find the object that the field is part of.)	To find the <code>Description</code> field for accounts, type <code>acco</code> , select <code>Accounts</code> , and scroll down to <code>Description</code> under <code>Field Permissions</code> .
Tabs	Type <code>rep</code> , then select <code>Reports</code> .
App permissions	Type <code>lEaD</code> , then select <code>Import Leads</code> .
Apex class access settings	Type <code>apex</code> , then select <code>Apex Class Access</code> .
Visualforce page access settings	Type <code>VISU</code> , then select <code>Visualforce Page Access</code> .
System permissions	Type <code>api</code> , then select <code>API Enabled</code> .
Desktop client access settings	Type <code>des</code> , then select <code>Desktop Client Access</code> .
Login hours and login IP ranges	Type <code>log</code> , then select <code>Login Hours</code> or <code>Login IP Ranges</code> . Or type <code>ip r</code> , then select <code>Login IP Ranges</code> .
Service providers (available only if Salesforce is enabled as an identity provider)	Type <code>serv</code> , then select <code>Service Providers</code> .

Cloning Profiles

Available in: **Enterprise, Unlimited, Developer,** and **Database.com** Editions

User Permissions Needed	
To create profiles:	“Manage Users”

To create a profile, you must clone an existing profile.

1. Click *Your Name* ► **Setup** ► **Manage Users** ► **Profiles**.
2. In the Profiles list page, do one of the following:
 - Click **New Profile**, then select an existing profile that's similar to the one you want to create.
 - If enhanced profile list views are enabled, click **Clone** next to a profile that's similar to the one you want to create.
 - Click the name of a profile that's similar to the one you want to create, then in the profile page, click **Clone**.

A new profile uses the same user license as the profile it was cloned from.

3. Enter a profile name.
4. Click **Save**.

Viewing a Profile's Assigned Users

Available in: **Enterprise, Unlimited, Developer,** and **Database.com** Editions

User Permissions Needed	
To view users that are assigned to a profile:	“View Setup and Configuration”
To create and edit users:	“Manage Users”

To view all users that are assigned to a profile from the profile overview page, click **Assigned Users** (in the enhanced profile user interface) or **View Users** (in the original profile user interface). From the assigned users page, you can:

- Create one or multiple users
- Reset passwords for selected users
- Edit a user
- View a user's detail page by clicking the name, alias, or username
- View or edit a profile by clicking the profile name
- Export users to Google and create Google Apps accounts (if Google Apps is enabled in your organization)

App and System Settings in the Enhanced Profile User Interface

Available in: **Enterprise, Unlimited, Developer, and Database.com** Editions

Database.com Edition doesn't include assigned apps, tabs, record types, page layouts, Visualforce, and desktop clients

In the enhanced profile user interface, administrators can easily navigate, search, and modify settings for a single profile. Permissions and settings are organized into pages under app and system categories, which reflect the rights users need to administer and use app and system resources.

App Settings

Apps are sets of tabs that users can change by selecting the drop-down menu in the header. All underlying objects, components, data, and configurations remain the same, regardless of the selected app. In selecting an app, users navigate in a set of tabs that allows them to efficiently use the underlying functionality for app-specific tasks. For example, let's say you do most of your work in the sales app, which includes tabs like Accounts and Opportunities. To track a new marketing campaign, rather than adding the Campaigns tab to the sales app, you select Marketing from the app drop-down to view your campaigns and campaign members.

In the enhanced profile user interface, the Apps section of the overview page contains settings that are directly associated with the business processes that the apps enable. For example, customer service agents may need to manage cases, so the “Manage Cases” permission is in the Call Center section of the App Permissions page. Some app settings aren't related to app permissions. For example, to enable the Time-Off Manager app from the AppExchange, users need access to the appropriate Apex classes and Visualforce pages, as well as the object and field permissions that allow them to create new time-off requests. The Apps section contains links to these pages:

- Assigned Apps
- Objects and Tabs, which include:
 - Tab Settings
 - Record Types and Page Layout Settings
 - Object Permissions
 - Field Permissions
- App Permissions
- Apex Class Access
- Visualforce Page Access



Note: Regardless of the currently selected app, all of a user's permissions are respected. For example, although the “Import Leads” permission is under the Sales category, a user can import leads even while in the Call Center app.

System Settings

Some system functions apply to an organization and not to any single app. For example, login hours and login IP ranges control a user's ability to log in, regardless of which app the user accesses. Other system functions apply to all apps. For example, the “Run Reports” and “Manage Dashboards” permissions allow managers to create and manage reports in all apps. In some cases, such as with “Modify All Data,” a permission applies to all apps, but also includes non-app functions, like the ability to download the Data Loader and empty the organization's recycle bin.

In the enhanced profile user interface, the System section of the overview page contains links to these pages:

- System Permissions
- Desktop Client Access
- Login Hours
- Login IP Ranges
- Service Providers (if Salesforce is enabled as an identity provider)

Specifying Record Types and Page Layout Assignments in the Enhanced Profile User Interface

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

User Permissions Needed	
To edit object permissions and settings:	“Manage Users”
	AND
	“Customize Application”

In the enhanced profile user interface, Record Types and Page Layout Assignments settings determine the record type and page layout assignment mappings that are used when users view records. They also determine which record types are available when users create or edit records.

To specify record types and page layout assignments:

1. Click ***Your Name*** ► **Setup** ► **Manage Users** ► **Profiles**.
2. Select a profile.
3. In the **Find Settings...** box, enter the name of the object you want and select it from the list.
4. Click **Edit**.
5. In the Record Types and Page Layout Assignments section, make changes to the settings as needed.

Setting	Description
Record Types	Lists all existing record types for the object. --Master-- is a system-generated record type that's used when a record has no custom record type associated with it. When --Master-- is assigned, users can't set a record type to a record, such as during record creation. All other record types are custom record types.
Page Layout Assignment	The page layout to use for each record type. The page layout determines the buttons, fields, related lists, and other elements that users with this profile see when creating records with the associated record type. Since all users can access all record types, every record type must have a page layout assignment, even if the record type isn't specified as an assigned record type in the profile.
Assigned Record Types	Record types that are checked in this column are available when users with this profile create records for the object. If --Master-- is selected, you can't select

Setting	Description
	any custom record types; and if any custom record types are selected, you can't select --Master--.
Default Record Type	The default record type to use when users with this profile create records for the object.

The Record Types and Page Layout Assignments settings have some variations for the following objects or tabs.

Object or Tab	Variation
Accounts	If your organization uses person accounts, the accounts object additionally includes Business Account Default Record Type and Person Account Default Record Type settings, which specify the default record type to use when the profile's users create business or person account records from converted leads.
Cases	The cases object additionally includes Case Close settings, which show the page layout assignments to use for each record type on closed cases. That is, the same record type may have different page layouts for open and closed cases. With this additional setting, when users close a case, the case may have a different page layout that exposes how it was closed.
Home	You can't specify custom record types for the home tab. You can only select a page layout assignment for the --Master-- record type.

6. Click **Save**.

Field Permissions

Available in: **Enterprise, Unlimited, Developer, and Database.com** Editions

Field permissions specify the access level for each field in an object. In the enhanced profile user interface, the setting labels differ from those in the original profile user interface and in field-level security pages for customizing fields.

Access Level	Enabled Settings in Enhanced Profile User Interface	Enabled Settings in Original Profile and Field-Level Security Interfaces
Users can read and edit the field.	Read and Edit	Visible
Users can read but not edit the field.	Read	Visible and Read-Only
Users can't read or edit the field.	None	None

Defer Sharing Calculations

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

In Summer '11, when you make changes to roles or groups you can suspend automatic group membership and sharing rule calculation. Performing a large number of configuration changes can lead to very long sharing rule evaluations or time outs. To avoid these issues, you can suspend these calculations and resume during your organization's maintenance periods.

Defer sharing calculation is ideal if you make a large number of changes to roles, territories, groups, users, portal account ownership, or public groups participating in sharing rules, and you want to suspend the automatic sharing calculation to a later time.

Defer Sharing Calculations Overview

Available in: **Enterprise, Unlimited, Developer, and Database.com** Editions



Note: The defer sharing calculation feature isn't enabled by default. To enable it for your organization, contact salesforce.com.

Performing a large number of configuration changes can lead to very long sharing rule evaluations or time outs. To avoid these issues, an administrator can suspend these calculations and resume calculations during an organization's maintenance period.

Deferring sharing calculation is ideal if you make a large number of changes to roles, territories, groups, users, portal account ownership, or public groups participating in sharing rules, and want to suspend the automatic sharing calculation to a later time.

Group membership and sharing rule calculation are enabled by default.

If	You can
Group membership and sharing rule calculation are enabled	<ul style="list-style-type: none"> Suspend, update, and resume group membership calculation. This suspends sharing rule calculation and requires a full recalculation of sharing rules. Suspend, update, and resume sharing rule calculation.
Group membership calculation is enabled and sharing rule calculation is suspended	Suspend, update, and, resume group membership calculation.
Group membership calculation is suspended and sharing rule calculation is enabled	Suspend, update, resume, and recalculate sharing rule calculation.

To suspend or resume group membership calculation, see [Managing Group Membership Calculations](#).

To suspend, resume, or recalculate sharing rule calculation, see [Sharing Rule Recalculation](#).

Managing Group Membership Calculations

Available in: **Enterprise, Unlimited, Developer, and Database.com** Editions

User Permissions Needed	
To defer sharing calculations:	“Manage Users” AND “View Setup and Configuration” AND “Manage Sharing Calculation Deferral”
To suspend and resume group membership calculation:	“Manage Users”



Note: The defer sharing calculation feature isn't enabled by default. To enable it for your organization, contact salesforce.com.

When you make changes to roles, territories, groups, or users, or change ownership of portal accounts, group membership is automatically recalculated to add or remove access as necessary. Changes can include adding or removing a user from a group or changing a role to allow access to different sets of reports.

If you are making changes to groups that affect a lot of records, you may want to suspend automatic group membership calculation.

To suspend or resume group membership calculation:

1. Click ***Your Name*** ► **Setup** ► **Security Controls** ► **Defer Sharing Calculations**.
2. In the Group Membership Calculations related list, click **Suspend**.



Note: If sharing rule calculations are enabled, suspending group membership calculations also suspends sharing rule calculations. Resuming group membership calculations also requires full sharing rule recalculation.

You can't join a Chatter group during recalculation because adding a user to a Chatter group affects group membership tables, and group membership tables can't be changed during recalculation. You can join a Chatter group when group membership recalculation is finished.

3. Make your changes to roles, territories, groups, users, or portal account ownership.
4. To enable group membership calculation, click **Resume**.

Sharing Rule Recalculation

Account and contact sharing rules are available in: **Professional, Enterprise, Unlimited, and Developer** Editions

Account territory, case, lead, and opportunity, sharing rules are available in: **Enterprise, Unlimited, and Developer** Editions

Campaign sharing rules are available in **Professional** Edition for an additional cost, and **Enterprise, Unlimited, and Developer** Editions

Custom object sharing rules are available in: **Enterprise, Unlimited, Developer, and Database.com** Editions.

User Permissions Needed

To suspend, resume or recalculate sharing rules:	“Manage Users”
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Note: The defer sharing calculation feature isn't enabled by default. To enable it for your organization, contact salesforce.com.

To suspend, resume, or recalculate sharing rule calculation:

1. Click **Your Name** ► **Setup** ► **Security Controls** ► **Defer Sharing Calculations**.
2. In the Sharing Rule Calculations related list, click **Suspend**.
3. Make changes to sharing rules, roles, territories, or public groups participating in sharing rules.



Note: Any changes to sharing rules require a full recalculation.

4. To enable sharing rule calculation, click **Resume**.
5. To manually recalculate sharing rules, click **Recalculate**.

When sharing is recalculated, Salesforce also runs all Apex sharing recalculations.

Search Enhancements

Global Search Available in Salesforce Setup Pages



You asked for it! This enhancement is from an [idea](#) on IdeaExchange.

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

The Global Search box now appears in the header of all Salesforce setup pages. Global Search behaves the same way on the setup pages as it does on other pages; it doesn't search the contents of the setup pages. You must enable Chatter to enable Global Search.

Accuracy Improvements in Search Results

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

Starting in Summer '11, salesforce.com is incrementally improving accuracy in search results. In most cases, you'll see the same number of matches in your search results, but the order of your results might change. Salesforce.com evaluates your search terms and your data to move more relevant matches higher in your list of results.

Security Enhancements

Available in: All Editions

Summer '11 introduces several new features that enhance security.

Improved Identity Confirmation Flow

The identity confirmation process has been improved and made consistent across devices. Salesforce now sends a numeric verification code to users instead of a URL for identity confirmation. In addition, the process has been simplified by removing unnecessary screens and duplicate logins. This improves usability for all users and is more compatible with mobile devices.

Just-In-Time Provisioning

With just-in-time provisioning, you can use SAML to create users on the fly the first time they try to log in. This eliminates the need to create user accounts in advance. For example, if you recently added an employee to your organization, you don't need to manually create the user in Salesforce. When they log in with single sign-on, their account is automatically created for them, eliminating the time and effort with on-boarding the account. Just-in-time provisioning works with your SAML identity provider to pass the correct user information to Salesforce in a SAML 2.0 assertion. You can both create and modify accounts this way. Because just-in-time provisioning uses SAML to communicate, your organization must have SAML-based single sign-on enabled.

Blank Portal Attribute Values Allowed in SAML Assertions

When configuring SAML sign-on information for portals, you must gather and share certain information with your identity provider. The SAML assertion sent from your service provider must contain the `portal_id` and `organization_id`. You can now leave both of these attributes blank to differentiate between portal and platform users. If you leave the attributes blank, it indicates a regular platform user. If they are populated, it is a portal user.

Mobile Phone Verification – Pilot



Note: Mobile phone verification is currently available through a pilot program.

Starting with Summer '11, if you get an identity challenge when logging into Salesforce, you are sent an email message with a security code. You must enter that code to confirm your identity.

As part of the pilot program, you can also choose to receive the security code via SMS text message in addition to email. Pilot users may be prompted during login to register a phone, or you can click **Your Name** > **Setup** > **My Personal Information** > **Personal Information** to access your account and add a mobile phone. After you add a mobile number, click **Verify** to authorize your phone. Contact salesforce.com to have this feature enabled.

Force.com Apex Code Enhancements

Available in: **Unlimited, Developer, Enterprise, and Database.com** Editions

Force.com Apex code includes the following enhancements in Summer '11. Refer to the [Force.com Apex Code Developer's Guide](#) for complete information about Apex.

The following enhancements are generally available:

New `System.URL` Class

Use the methods of the `System.URL` class to create links to objects in your organization. Such objects can be files, images, logos, or records that you want to include in external emails, in activities, or in Chatter posts. For example, you can create a link to a file uploaded as an attachment to a Chatter post by concatenating the Salesforce base URL with the file ID, as shown in the following example:

```
// Get a file uploaded through Chatter.
ContentDocument doc = [SELECT id FROM ContentDocument
    WHERE title = 'myfile'];
// Create the link to the file.
String fullFileURL = URL.getSalesforceBaseUrl().toExternalForm() +
    '/' + doc.id;
system.debug(fullFileURL);
```

The following example creates a link to a Salesforce record. The full URL is created by concatenating the Salesforce base URL with the record ID.

```
Account acct = [SELECT name FROM account WHERE name = 'Acme'];
String fullRecordURL = URL.getSalesforceBaseUrl().toExternalForm() + '/' + acct.id;
```

Cloning the Read-Only Timestamp Fields

An additional optional argument has been added to the `List` `deepClone` and the `sObject` `clone` methods that allows you to choose whether the read-only fields `CreatedById`, `CreatedDate`, `LastModifiedById`, and `LastModifiedDate` are copied to the cloned copy.

Cloning Auto Number Fields

An additional optional argument has been added to the `List` `deepClone` and the `sObject` `clone` methods that allows you to choose whether the auto number fields are copied to the cloned copy.

Debug Log Filters for Apex Classes and Apex Triggers

You can now fine-tune the log verbosity at the trigger and class level. This is especially helpful when debugging Apex logic. For example, to evaluate the output of a complex process, you can raise the log verbosity for a given class while turning off logging for other classes or triggers within a single request.

When you override the debug log levels for a class or trigger, these debug levels also apply to the class methods that your class or trigger calls and the triggers that get executed as a result. All class methods and triggers in the execution path inherit the debug log settings from their caller, unless they have these settings overridden.

To set log filters:

1. From a class or trigger detail page, click **Log Filters**.
2. Click **Override Log Filters**.

The log filters are set to the default log levels.

3. Choose the log level desired for each log category.

Debug Log Truncation with Newest Log Entries Preserved

Debug logs are now truncated starting from the oldest log entries. The newer log entries are preserved. This allows you to have access to the most pertinent information leading to an error that you are diagnosing. The debug log gets truncated by 200 KBytes when it reaches its maximum size of 2 MB. Some log entries don't get truncated and will always be part of the debug log, even if they're part of the oldest log entries, because they're necessary for processing the debug log.

However, other log information that appears between the start and end lines of these log entries will be removed as part of log truncation. The following are the events that are associated with non-deletable log entries.

- EXECUTION_STARTED
- EXECUTION_FINISHED
- CODE_UNIT_STARTED
- CODE_UNIT_FINISHED
- METHOD_ENTRY
- METHOD_EXIT
- CONSTRUCTOR_ENTRY
- CONSTRUCTOR_EXIT
- SOQL_EXECUTE_BEGIN
- SOQL_EXECUTE_END
- SOSL_EXECUTE_BEGIN
- SOSL_EXECUTE_END
- CALLOUT_REQUEST
- CALLOUT_RESPONSE
- FATAL_ERROR

New System Debug Log Category

The new System debug log category contains information about calls to all system methods such as the `System.debug` method. Using this debug log category, you can now exclude the logging of system debug log events from the debug log. For example, you can exclude the logging of method entry and method exit debug log events that are associated with a `System.debug` call. If the System debug log category is set to NONE or INFO, the system debug log events will no longer be written to the debug log and a call to the `System.debug` method will only generate one log entry for the actual debug log message, `USER_DEBUG`.

Compiling Apex Classes

You can now compile Apex classes that are installed from a managed package through the **Compile all classes** link from the Apex Classes page. Managed classes must be compiled first before they appear and can be run from the Apex Test Execution page. Unlike other classes which are compiled after being saved, managed classes can only be compiled through the **Compile all classes** link. This link compiles all the Apex classes in your organization, whether or not they're from a managed package.

Change in Hierarchy Custom Setting Method Behavior

Starting with Apex saved using Salesforce API version 22.0, the custom setting `getInstance` hierarchy methods now return a new custom setting record with an ID set to `null` and with merged fields if the running user, the specified user or the specified profile don't have a custom setting data set record defined. You can add this new custom setting for the user or profile by using `insert` or `upsert`. In contrast, with Apex saved using previous versions of the Salesforce API, the `getInstance` methods return the custom setting data set record that is defined at the lowest level in the hierarchy.

For more information about using Apex with custom settings, see the [Custom Settings Methods](#) in the *Force.com Apex Code Developer's Guide*.

New Limit for Future Method Invocations

The basis for the computation of the limit on the number of future method invocations changed. In addition to full Salesforce user licenses, Salesforce Platform and Force.com - One App user licenses are now included in the computation of the limit. Chatter Only, Guest User, Customer Portal User, and Partner Portal User licenses are excluded. The limit is 200 method calls per full Salesforce user license, Salesforce Platform user license, and Force.com - One App user license, per 24 hours. This is an organization-wide limit. For example, suppose your organization has three full Salesforce licenses, two Salesforce Platform licenses, and 100 Customer Portal User licenses. Your entire organization is limited to only 1,000 method calls every 24 hours $((3+2) * 200)$, not 105.)

Exceptions Thrown During Batch Jobs Are Now Passed to Test Methods

Starting with Apex saved using Salesforce API version 22.0, exceptions that occur during the execution of a batch Apex job that is invoked by a test method are now passed to the calling test method, and as a result, causes the test method to fail. If you want to handle exceptions in the test method, enclose the code in `try` and `catch` statements. You must place the `catch` block after the `stopTest` method. Note however that with Apex saved using Salesforce API version 21.0 and earlier, such exceptions don't get passed to the test method and don't cause test methods to fail.

Async Test Console



You asked for it! This enhancement is from [these ideas](#) on the IdeaExchange.

Async Test Console was introduced in Spring '11 as a pilot release and was previously known as Apex Test Framework. With Summer '11, it is now generally available. Two new pages have been added that make it even easier to run your Apex unit tests.

Apex Test Execution

Run just one, a set, or all the tests in your organization. Tests are run asynchronously: start them, then go work on other things. You can then monitor the tests, add more tests to the ones that are running, or abort running tests. Once a test finishes running, you can see additional information about that test run. For example, if there were any errors, the first error message displays, as well as the stack trace. Click **Your Name** > **Setup** > **Develop** > **Apex Test Execution**.

Apex Test Results

See all the test results for your organization. Click **Your Name** > **Setup** > **Develop** > **Apex Test Execution** > **View Test History**. You can add filters to view just the results you want to see by creating a view. Test results remain for 30 days after they finish running, or until cleared.

In addition, after you execute your unit tests, you can see how much of your existing code is covered. Click **Your Name** > **Setup** > **Develop** > **Apex Classes**, then click **Calculate your organization's code coverage**.

You can also verify which lines of code are covered by tests for an individual class. Click **Your Name** ► **Setup** ► **Develop** ► **Apex Classes**, then click the percentage number in the Code Coverage column for a class.

Visualforce Enhancements

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

Custom controllers and standard controller extensions are not supported in **Group** or **Professional** Editions.

Summer '11 introduces several new features that enhance the capabilities of previous versions of Visualforce. For detailed information on these new features, see the [Visualforce Developer's Guide](#).

The following enhancements are now available in Visualforce:

Dynamic Visualforce Components—Pilot

The Summer '11 release has a new pilot feature called dynamic Visualforce components for select salesforce.com customers.

Dynamic Visualforce components offer a way to create Visualforce pages that render according to a variety of states, such as a user's permissions or actions. Rather than using standard markup, dynamic Visualforce components are designed in Apex.

The dynamic Visualforce component is defined in Apex like this:

```
Component.Component_namespace.Component_name
```

For example, `<apex:dataTable>` becomes `Component.Apex.DataTable`. Visualforce components that are dynamically represented in Apex operate like regular classes. Every attribute that exists on a standard Visualforce component is available as a property in the corresponding Apex representation with get and set accessors. For example, you could manipulate the `value` attribute on an `<apex:outputText>` component like this:

```
Component.Apex.OutputText otField = new Component.Apex.OutputText();
otField.value='Some wild output text!';
```



Note: The Standard Component Reference contains the dynamic representation for all valid Visualforce components.

For more information, see Dynamic Visualforce Components in the [Visualforce Developer's Guide](#).

JavaScript Remoting for Apex Controllers

With Summer '11, Visualforce now allows some methods in Apex controllers to be called via JavaScript. Your Visualforce pages and Apex classes must be running at least API version 22.0.

JavaScript remoting calls use the following syntax:

```
[<namespace>].<controller>.<method>([params...], <callbackFunction>(result, event)
{
    // callback function logic
```

```
}, {escape:true});
```

In Apex, method declarations are preceded with the `@RemoteAction` annotation:

```
@RemoteAction
global static String getItemId(String objectName) { ... }
```

JavaScript remoting was released as a Developer Preview in Spring '11. In Summer '11, JavaScript remoting now supports additional return data types. Also, references to the same objects are no longer duplicated in the response. For more information, see JavaScript Remoting for Apex Controllers in the *Visualforce Developer's Guide*.

Inline Editing Support for Rich Text Area Fields

Inline editing on Visualforce pages now supports rich text area (RTA) fields bound to the `<apex:outputField>` component.

In Spring '11, inline editing support was introduced for Visualforce pages through the `inlineEdit` attribute of the `<apex:detail>` component and the `<apex:inlineEditSupport>` component.

For more information, see the Enabling Inline Editing Quick Start tutorial in the *Visualforce Developer's Guide*.

Field Sets Have New Property Accessors

In Summer '11, Visualforce pages can access more information about the fields in your field sets. The following properties are available:

Property Name	Description
DBRequired	Indicates whether the field is required for the object
FieldPath	Lists the field's spanning info
Label	The UI label for the field
Required	Indicates whether the field is required in the field set
Type	The data type for the field

For more information, see the Working with Field Sets chapter in the *Visualforce Developer's Guide*.

API Enhancements

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

Force.com API protocols, version 22.0, contain new features and bug fixes that improve the capabilities of applications that leverage the Force.com platform. Considerable effort has been made to ensure backwards capability for applications that have been written against previous versions of the API, starting with the SOAP Web Services API 2.5.

The new API protocols provide a number of powerful enhancements that further improve any integration already in place between Salesforce and your other systems.

Summer '11 (API version 22.0) improvements:

- [New and Changed Objects](#) on page 71, including [Chatter API Objects](#) on page 72
- [Bulk API Enhancements](#) on page 74
- [REST API Enhancements](#) on page 74

New and Changed Objects

Objects are available using any Force.com API unless otherwise noted. Review the changes to existing objects and availability of new objects in this release. You can also find links to changes in previous versions of objects.

Generally Available Enhancements

Changed Objects

The following objects have been changed in API version 22.0:

- The Account object now includes a `Jigsaw` field, which references the ID of a company in Jigsaw.
- The Contact object now includes a `Jigsaw` field, which references the ID of a company in Jigsaw.
- The Lead object now includes a `Jigsaw` field, which references the ID of a company in Jigsaw.
- `FeedPost` is deprecated and no longer available after API version 22.0. Use `FeedItem` instead.
- The `FeedPostId` field is no longer available on any record feed objects, such as `AccountFeed` or `CaseFeed` in API version 22.0 and later. Use the appropriate fields in the record feed object instead, such as `Body` or `ContentData`.

The following is the list of objects where the `FeedPostId` field is not available in API version 22.0 and later:

- `AccountFeed`
- `AssetFeed`
- `Article Type__Feed`
- `CampaignFeed`
- `CaseFeed`
- `CollaborationGroupFeed`
- `ContactFeed`
- `ContentDocumentFeed`
- `ContractFeed`
- `Custom Object__Feed`
- `DashboardFeed`
- `EventFeed`
- `FeedItem`
- `LeadFeed`
- `NewsFeed`
- `OpportunityFeed`
- `Product2Feed`
- `ReportFeed`
- `SolutionFeed`
- `TaskFeed`
- `UserFeed`
- `UserProfileFeed`

- The `DefaultGroupNotificationFrequency` field on the `User` object now defaults to `N` for Never. Users don't automatically receive Chatter group email notifications when joining groups. For Professional, Enterprise, Unlimited, and Developer Edition organizations that existed prior to API version 22.0, the default value remains `D` for Daily digests.
- The `CaseArticle` object now includes the `ArticleLanguage` field, which identifies the language of an article attached to a case.
- In the `Profile` object, the `PermissionPermissionName` field now includes the `Filter` property, to support SOQL queries.
- SOSL searches for files (which are conducted with the `ContentVersion` object) now use `AND` as the default operator.
- The `User` object now includes a `UserPermissionsJigsawProspectingUser` field, which indicates whether the user is allocated one Jigsaw user license or not. The Jigsaw user license lets the user add Jigsaw contact and lead records to Salesforce in supported editions.

Chatter API Objects

Changed Chatter Objects

The following objects have been changed in API version 22.0.

Object	Now includes the <code>RelatedRecordId</code> field	New default value in the <code>DefaultGroupNotificationFrequency</code> field
AccountFeed	✓	
AssetFeed	✓	
CampaignFeed	✓	
CaseFeed	✓	
CollaborationGroupFeed	✓	
ContactFeed	✓	
ContentDocumentFeed	✓	
ContractFeed	✓	
DashboardComponentFeed	✓	
DashboardFeed	✓	
EventFeed	✓	
FeedItem	✓	
LeadFeed	✓	
NewsFeed	✓	
OpportunityFeed	✓	
Product2Feed	✓	

Object	Now includes the <code>RelatedRecordId</code> field	New default value in the <code>DefaultGroupNotificationFrequency</code> field
ReportFeed	✓	
SolutionFeed	✓	
TaskFeed	✓	
User		✓
UserFeed	✓	
UserProfileFeed	✓	
UserProfileFeed	✓	

Now includes the `RelatedRecordId` field

The `RelatedRecordId` field is the ID of the `ContentVersion` object associated with a `ContentPost`. This field is null for all posts except `ContentPost`.

For example, set the `RelatedRecordId` to an existing `ContentVersion` and post it to a feed as a `FeedItem` object of type `ContentPost`.

New default value in the `DefaultGroupNotificationFrequency` field

The `DefaultGroupNotificationFrequency` field on the `User` object sets the default frequency for sending the user's Chatter group email notifications when the user joins groups. This field now defaults to `N` for Never. For Professional, Enterprise, Unlimited, and Developer Edition organizations that existed prior to API version 22.0, the default value remains `D` for Daily digests.

`FeedPostId` field removed from all Chatter objects

The `FeedPostId` field is removed from all Chatter objects starting in API version 22.0. Use `FeedItem` instead.

New fields on `CollaborationGroup` object

The `CollaborationGroup` object now includes the following fields:

- `HasPrivateFieldsAccess`: If set to `true`, indicates that a user can see the `InformationBody` and `InformationTitle` fields in a private group. This field is set to `true` for members of a private group and users with “Modify All Data” or “View All Data” permissions.
- `InformationBody`: The text of the Information section. For private groups, only visible to members and users with “Modify All Data” or “View All Data” permissions.
- `InformationTitle`: The title of the Information section. For private groups, only visible to members and users with “Modify All Data” or “View All Data” permissions.

Other Enhancements

- SOSL searches for files (which are conducted with the `ContentVersion` object) now use `AND` as the default operator.

REST API Enhancements

Force.com REST API leverages the simplified approach of REST to allow developers to more easily interact with other Web 2.0 applications such as Amazon.com AWS, Microsoft Azure, Google, Facebook, Twitter, and others:

- Interact with the application in a simplified way
- Integrate with third-party cloud systems and services
- Support mashup and Web 2.0 projects

If you need to move large amounts of data, use the Bulk API, which is built on RESTful principles, but is asynchronous and optimized for large data-loading tasks.

Apex REST—Pilot

You can implement custom web services in Apex and expose them via REST architecture. Download the [Apex REST Developer Guide](#).



Note: Apex REST is currently available through a pilot program. For information on enabling Apex REST for your organization, contact salesforce.com, inc..

Bulk API Enhancements

Bulk API Queries

The Bulk API now supports the `query` operation, with a few restrictions on SOQL. For more information, see the [Bulk API Developer's Guide](#).

Force.com Development as a Service Enhancements

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

Updated Calls

The following changes have been made to Metadata API calls in version 22.0:

Call	Argument or Result Object	Field	Change	Description
<code>deploy()</code>	<code>DeployOptions</code>	<code>purgeOnDelete</code>	Added	<p>If <code>true</code>, the deleted components in the <code>destructiveChanges.xml</code> manifest file aren't stored in the Recycle Bin. Instead, they become immediately eligible for deletion.</p> <p>This option only works in Developer Edition or sandbox organizations; it doesn't work in production organizations.</p>

Updated Metadata

The following metadata fields have been added or changed in Metadata API version 22.0:

Metadata Type or Related Object	Field	Change	Description
Workflow	WorkflowTimeTrigger	Added	Represents a set of Workflow actions (Field Update, Email Alert, Outbound Message and Tasks) that should execute before/after a specified interval of time.
Layout	showHighlightsPanel	Added	If set, the highlights panel displays on pages in the Service Cloud console.
Layout	showInteractionLogPanel	Added	If set, the interaction log displays on pages in the Service Cloud console.

Additional Force.com Enhancements

Dependent Lookups—Generally Available

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

In Summer '11, dependent lookups, relationship fields with lookup filters that references fields on the source object, are now generally available. For more information, see “About Dependent Lookups” in the Salesforce online help.

Setup Audit Trail Enhancements

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

In Summer '11, the setup audit trail history now includes an additional column, Delegate User. When applicable, this column lists the username of a user who made a setup change on behalf of an end user. For example, if a user grants login access to a support representative and the representative makes a setup change, the representative's username is listed.

To view the setup audit trail, click *Your Name* > **Setup** > **Security Controls** > **View Setup Audit Trail**.

Password Policies Enhancement

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

When setting password policies, you can now specify an alternative home page for users with the “API Only User” permission. After completing user management tasks such as resetting a password, API-only users are redirected to the alternative home page URL, rather than to the login page.

To specify an alternative home page for API-only users, click *Your Name* > **Setup** > **Security Controls** > **Password Policies**.

The setup audit trail tracks changes to the alternative home page.

Limit Updates for Fields on All Objects, Sharing Rules, and Rich Text Area and Long Text Area Fields

Available in: **Professional, Enterprise, Unlimited, Developer, and Database.com** Editions

In Summer '11, the limit for the maximum number of fields on all objects has been raised from 500 to 800 fields per object in Unlimited Edition. This update is automatically available to all administrators.

The total number of sharing rules per object increases from 100 to 300 in Professional, Enterprise, Unlimited, Developer and Database.com Editions.

There are no longer limits to the number of rich text area and long text area fields that an object can contain, although your Edition's limit for the total number of custom fields allowed on an object, regardless of field type, still applies. Now, each object can contain a total of 1.6 million characters across long text area and rich text area fields. The default character limit for long text area and rich text area fields is 32,768 characters. A long text area or rich text area field needs to contain at least 256 characters. This update is for all Editions except Database.com

Half-Up Rounding for Display of All Numeric Fields

Available in: **All** Editions

As of Summer '11, the round half-up tie-breaking rule, instead of the round half-even tie-breaking rule, is used to calculate the user interface display of all numeric fields. For example, if 12.345 is the stored number, in Winter '11, it would have been displayed as 12.34. Now, it is displayed as 12.35. If -12.345 is the stored number, in Winter '11 it would have been displayed as -12.34. Now, it is displayed as -12.35. This change has no impact on the `ROUND` function or the actual stored number.

Additional Language Support for Force.com

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

Salesforce now supports the following platform languages:

- Albanian: `sq`
- Basque: `eu`
- Estonian: `et`
- Icelandic: `is`
- Irish: `ga`
- Latvian: `lv`
- Lithuanian: `lt`
- Maltese: `mt`
- Montenegrin: `sh_ME`
- Portuguese (European): `pt_PT`
- Welsh: `cy`

To use any of these languages, ask your salesforce.com representative to enable platform languages.

Package Upload Monitoring

Available in: **All** Editions



You asked for it! Summer '11 addresses this idea on IdeaExchange to make [package uploads asynchronous](#).

As of Summer '11, you can now track package uploads directly and view any failures during the upload process. Email notification is no longer required. There are new tabs to navigate to the package detail page and new real-time upload indicators on the package and package version pages. You can follow an upload step by step, including individual Apex test runs.

Quick Find Available in Setup

Available in: **All** Editions

In Summer '11, the sidebar in setup includes a search box for browsing and quickly finding setup tools. In the left pane of any setup page, you can:

- Type the first few characters of a setting name in the **Quick Find** box. As you type, items that match your search terms appear in the menu. Click an item in the list to go to its setup page. For example, to quickly find the user profiles page, type `prof` in the **Quick Find** box.
- Click **Expand All** to open all setup menus. If you have typed anything in the **Quick Find** box, only the menus with matching items are expanded.
- Click **Collapse All** to close all setup menus.



Note: Quick Find only returns results from the setup menu—it doesn't search records in your organization. To search for records, use Global Search, Sidebar Search, or Advanced Search.

Monthly Data Export

Weekly export available in: **Enterprise** and **Unlimited** Editions

Monthly export available in: **All** editions, except for Database.com

Summer '11 now lets all Salesforce editions (except Database.com) perform monthly data exports. **Enterprise** and **Unlimited** editions can continue to export data on a weekly basis but now have the option to export monthly as well.

To export your Salesforce data, click *Your Name* ► **Setup** ► **Data Management** ► **Data Export** and **Export Now** or **Schedule Export**.

To reflect this new functionality, the “weekly data export” permission has been renamed to “data export.”

Field History Storage

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

For any new organizations created during or after the Summer '11 release, field history is stored for 18 months. For more information, see “Tracking Field History” in the Salesforce online help.

New Object History Field for Full Sandbox Copy

Available in: **Enterprise, Unlimited, and Database.com** Editions

With Summer '11, you can configure how much object history to copy when you create a full sandbox. Object history is the field history tracking of both custom and standard objects. Use the new Object History field to copy from 0 to 180 days of field history tracking, in 30 day increments. The default value is 30 days.

Decreasing the number of days of object history can significantly speed up sandbox copy time.

Enhanced Field Sets Editor—Beta

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

In Summer '11, you can now create field sets with a drag and drop WYSIWYG interface. The enhanced editor lets you quickly customize, create or edit field sets for your organization, or edit any installed field set with an improved drag and drop design. For more information, see “Creating and Editing Field Sets” in the Salesforce online help.

Field Sets Required Bit—Beta

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

In Summer '11, you can define a field as required in a field set. This feature lets you define a field as required to ensure a user enters the necessary information on a field. For more information, see “Field Sets Required Bit” in the Salesforce online help.

Field Sets Spanning—Beta

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

In Summer '11, you can span a field into a field set that references multiple objects. The total number of cross object spans within the In the Field Set is 25. For more information, see “Creating and Editing Field Sets” in the Salesforce online help.

Help and Training Enhancements

Videos

Like to learn by watching? In Summer '11 we offer some great product demos for new and updated features:

- [Introducing File Collaboration in Chatter](#) (2:57 minutes)
- [Getting Started with Report Builder](#) (2:34 minutes)
- [Using Salesforce for Outlook](#) (2:43 minutes)
- [Building Matrix Reports](#) (2:00 minutes)
- [Requesting a Meeting Using Cloud Scheduler](#) (2:37 minutes)
- [Finding What You Need In Chatter](#) (2:58 minutes)
- [Finding Jigsaw Accounts and Contacts and Adding Them to Salesforce](#) (3:18 minutes)

Additionally, here's an updated demo for an existing feature:

- [Creating a Workflow Rule](#) (2:50 minutes)
- [Creating a Criteria-Based Sharing Rule](#) (1:13 minutes)

Tip Sheets and Implementation Guides

The following new or updated documents are now available:

- [Implementing Jigsaw Clean for Accounts, Contacts, and Leads](#)
- [Using Jigsaw Clean in Salesforce](#)
- [ISVforce Guide](#)
- [Find the Information You Need](#)
- [Report Formula Summary Functions](#)

Developer Guides

The following new or updated developer documents are now available:

- [Salesforce Knowledge Developers Guide](#)
- [Chatter REST API Developers Guide](#)

Workbooks

The following new or updated workbooks are now available:

- [Analytics Workbook](#)—Introduces you to dashboards and reports through a series of tutorials. By the end of this book, you'll have built a sales manager dashboard with a few key components, as well as their source reports. Along the way, you will learn about features like custom table components, combination charts, conditional highlighting, and custom summary formulas.
- [Chatter Administrator's Workbook](#)—Introduces Chatter, the enterprise collaboration solution, as well as ways to administer Chatter in your organization, such as adding new users, and clearing out feeds.
- [ISVforce Workbook](#)—Introduces you to application distribution via a series of quick tutorials. You'll create a simple app, package it for distribution, and install it in another org, just as a customer would.
- [Visual Flow Workbook](#)—Introduces you to the Flow Designer through a series of tutorials. You'll learn how to build simple flows that show you how to get user input, update records, and perform calculations.

Online Help Enhancements

The following new or updated help topics are now available:

- [Sales Cloud Overview](#) lists the Sales Cloud features, with links to more information for each feature. The Sales Cloud helps you build stronger relationships with customers, gain better visibility into sales, and close more deals, whether you're in the office or on the road. To view this topic, search for `Sales Cloud` in the Salesforce online help.
- [Service Cloud Overview](#) lists the Service Cloud features, with links to more information for each feature. The Service Cloud helps you provide more responsive customer service, increase agent productivity, reduce service costs, and gain better visibility into your service organization, whether you're in the office or on the road. To view this topic, search for `Service Cloud` in the Salesforce online help.
- We've updated the [Frequently Asked Questions](#) for reports and dashboards with new topics. See the [Reporting FAQ](#) and [Dashboards FAQ](#) topics in the Salesforce online help.