Salesforce CRM Content Implementation Guide

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INTRODUCTION TO SALESFORCE CRM CONTENT

Content includes all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

What is Salesforce CRM Content?

Salesforce CRM Content simplifies content management by incorporating user-friendly features into the following tasks:

Organizing

Rather than keep files in folders that make content difficult to find, Salesforce CRM Content stores files in fully searchable file repositories known as libraries. Administrators can create multiple libraries based on any classification, such as department name, job function, or team, then configure user permissions within the library to balance content access with security. Authors assign descriptive labels called tags to help classify and organize content across libraries. You can view a list of all content that belongs to a particular tag or filter search results based on a tag or tags. Salesforce CRM Content also provides private libraries, which allow users to reduce the clutter on their desktops while using content-management benefits such as document search and version control.

Searching

The powerful Salesforce CRM Content search engine scans the entire body of the document as well as content properties such as the title, description, tags, categorization data, and author name. You can filter searches by featured content, file format, author, tags, libraries, or custom fields and then view the results with various levels of detail, providing an easy way to find relevant content quickly. If Chatter is enabled for your organization, you can also filter your search results by Chatter files. The "smart bar" graphic for downloads, comments, ratings, and subscribers allows you to compare documents within a search result set.

Subscribing

Once a file is located, subscribing to it ensures that you receive an email notification when new versions are published or changes are made to the file's properties. You can also subscribe to authors, tags, and libraries, thus reducing the time spent searching for new or updated content. Notification emails will arrive real-time or once daily, depending on your preferences.

Previewing

In Salesforce CRM Content you don't need to download a large document to view it. If the document is a Microsoft PowerPoint, Word, Excel, or Adobe® PDF file, you can preview the entire file in your browser without downloading it. Some aspects of files may not be displayed in previews. Copy-protected PDFs can't be previewed.

Contributing

Uploading new or revised files in Salesforce CRM Content is fast and easy. During the upload process you choose a library and record type for your file or Web link, write a description, assign one or more tags, and fill out any customized fields that help categorize and define your content. Version management does not require checking files in and out, rather, you simply upload a new version of the file and Salesforce CRM Content maintains a version list accessible from the content details page. You can download past versions of a file and read all reason-for-change comments that an author may have included with a new version.

Reviewing Usage and Providing Feedback

Salesforce CRM Content provides several methods for determining whether content is valuable to readers. Featuring a piece of content increases its visibility in search results. Voting thumbs up or thumbs down on a file, Web link, or Google doc and adding comments allow you to participate directly in content improvement. You can also see who has subscribed to a file, link, or doc and how many times files have been downloaded. The Reports tab allows you to create standard or custom reports on Salesforce CRM

Content data. If the content delivery feature is enabled, you can send content to colleagues, leads, and contacts and then track how often the content has been previewed or downloaded.

Sharing Content in Salesforce

Salesforce CRM Content is also integrated with leads, accounts, contacts, opportunities, cases, products, and custom objects. If Salesforce CRM Content functionality is enabled on the Opportunity tab, for example, Salesforce CRM Content uses the fields on the opportunity detail page to search for files that may be relevant to that opportunity. You can drill down in the search results as needed or run your own search and then attach one or more files to the opportunity. The most current version of the file will be available on the detail page for the life of the opportunity.

How Do I Access Salesforce CRM Content?

The sections in this guide explain how to create Salesforce CRM Content users, define administrative settings in the Setup area, and configure libraries so contributors can begin publishing content. Licensed users can access Salesforce CRM Content by choosing **Content** from the Apps drop-down list. The Salesforce CRM Content application has three tabs:

Libraries tab

Clicking the Libraries tab opens the Libraries home page where you can access your personal library, choose a specific shared library to view or edit, analyze library usage and activity and, if applicable, create new libraries. The top of the page has several publishing-related options with which you can publish files, Web links, and Google docs as well as create custom content packs.

Content tab

Clicking the Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content libraries. If Chatter is enabled, files posted to Chatter groups and public Chatter files are also displayed on the Content tab. The top twenty most recently modified items are listed by default. You can search for content and then filter your results using several criteria. Click on a content item to open its content details page.

Subscriptions tab

Clicking the Subscriptions tab displays the Subscriptions home page, where you can view your Salesforce CRM Content subscriptions and toggle them off or on. Click the Content, Tags, Authors, or Libraries subtabs to view your subscriptions. Depending on your notification settings, you are notified of changes to your subscribed content via real-time emails or a once-daily email.

PLANNING YOUR SALESFORCE CRM CONTENT IMPLEMENTATION

Before you can begin setting up Salesforce CRM Content, it is important that you consider the following questions. The answers to these questions are necessary prerequisites to completing the tasks in this guide.

Who will have access to your Salesforce CRM Content organization?

Each user must have a Salesforce CRM Content user license and certain user permissions.

Note: Customer Portal and partner portal users can have view-only access to your organization without a Salesforce CRM Content user license.

How many libraries do you need?

Review the files you plan to store in Salesforce CRM Content to help you determine how many libraries you need and what content belongs to each library. Users are given access to content based on their library permissions. Note that every user has one personal library where he or she can store private or in-progress content.

What library permissions do you want to grant to different users?

A library permission is a group of privileges assigned to each Salesforce CRM Content library member. It determines which tasks a member can perform in a particular library. The same user can have a different library permission in each of his or her libraries. All Salesforce CRM Content organizations include three library permissions by default: Viewer, Author, and Administrator. You can customize these library permissions or create new ones. Note that library permissions do not apply to personal libraries; all users can save content in their personal library.

Do you need custom content fields?

All page layouts contain three default fields: `Description`, `Tags`, and `Title`. You can create additional fields and assign them to one or more page layouts. If you want to create a field named, for example, `Reviewed By`, your custom page layout would be a picklist with the names of possible reviewers.

Do you want to restrict the record types available in particular libraries?

If you create record types, you can choose to restrict record types to certain libraries. For example, if your sales teams use record types that are exclusive to sales collateral, you can ensure that these record types do not appear as options when users of the Marketing or Support libraries contribute content.

Which tagging rule do you want to apply per library?

In Salesforce CRM Content, tags are descriptive labels that help classify and organize content. Contributors can assign tags to their files, Google docs, or web links, to enable all library members to browse for content by tag. The tagging rule in a library determines how contributors can tag content; for example, the restricted-tagging rule does not allow contributors to create tags. Library tagging rules are optional. By default, library contributors can enter any tag. The tagging rule options are open tagging, guided tagging, and restricted tagging.

Do you want to add Google docs to Salesforce CRM Content?

Including Google docs in Salesforce CRM Content allows users to access all types of content from a single location and apply Salesforce CRM Content functionality, such as votes, comments, and subscriptions, to Google docs. To associate Google docs with a library, the Add Google Docs to Salesforce service must be activated for your organization.

Do you want to enable content deliveries?

A *content delivery* allows you to convert documents such as Microsoft® PowerPoint and Word files into an optimized web-based version for easy online viewing. After you create your delivery, you can send its encrypted URL to any recipient, such as leads, customers, partners, and colleagues, and then track how often people view or download the content. Content deliveries are available in Salesforce Classic only. However, Lightning Email generates delivery-based links as email attachments for Lightning Experience users who have access to the Content Deliveries feature. On the content details page in Salesforce CRM Content, you can create a new delivery or view all the deliveries associated with that piece of content.

Do you want to enable multilanguage support?

You can allow users to publish, edit, and search for content in any of the Salesforce-supported languages. Users can choose a language or publish in their personal language by default.

Do you want to make Salesforce CRM Content accessible from standard and custom objects?

You can enable Salesforce CRM Content functionality for leads, accounts, contacts, opportunities, cases, products, or custom objects by adding the Related Content related list to the appropriate page layout. From the Related Content related list, users can search for and attach content that is relevant to the record.

Do you want to enable Salesforce CRM Content in the Customer Portal and partner portal?

You can provide portal users with different levels of access to your Salesforce CRM Content organization.

SETTING UP SALESFORCE CRM CONTENT

Implementing Salesforce CRM Content for your organization includes creating licensed users; defining organization-level settings such as content fields, record types, and page layouts; customizing the libraries where contributors will add and view content; and, if applicable, enabling Salesforce CRM Content in your customer or partner portals.

Creating Salesforce CRM Content Users

To create a Salesforce CRM Content user:

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

2. Click **Edit** next to the user's name, and then select the `Salesforce CRM Content User` checkbox.

3. Optionally, select the `Receive Salesforce CRM Content Emails as Alerts` checkbox or the `Receive Salesforce CRM Content Alerts as Daily Digest` checkbox.

   If `Receive Salesforce CRM Content Emails as Alerts` is selected, the user receives email notifications if activity occurs on his or her subscribed content, libraries, tags, or authors. To receive real-time email alerts, select this checkbox and do not select the `Receive Salesforce CRM Content Alerts as Daily Digest` checkbox. If `Receive Salesforce CRM Content Alerts as Daily Digest` is selected, the user receives a once-daily email summary if activity occurs on his or her subscribed content, libraries, tags, or authors. Users can modify these preferences themselves.

4. Verify that the Salesforce CRM Content user has the appropriate Salesforce CRM Content user permissions enabled:

User Permission	Function Controlled
Manage Salesforce CRM Content	The user can create, edit, and delete libraries and edit library membership. This administrative user permission is inclusive of the other four Salesforce CRM Content user permissions.
Create Libraries	The user can create Salesforce CRM Content libraries.
Manage Content Permissions	The user can create, edit, and delete library permissions in Salesforce CRM Content.
Manage Content Properties	The user can create, edit, and delete custom fields in Salesforce CRM Content.
Manage record types and layouts for Files	The user can create, edit, and delete record types and page layouts in Salesforce CRM Content.

> **Note:** By default, the System Administrator user profile contains all Salesforce CRM Content user permissions.

5. When you are finished editing the user record, click **Save**.

Configuring Organization Settings

Before creating and configuring libraries in Salesforce CRM Content, complete the following optional administrative tasks.

Creating Custom Fields

You can create custom fields and assign them to a page layout. The default fields are `Description`, `Tags`, and `Title`. If you want to create a field named, for example, `Reviewed By`, your custom content field would be a picklist with the names of possible reviewers.

To create, modify, and delete Salesforce CRM Content custom fields for categorizing and defining your content, go to the object management settings for content. If you're using Lightning Experience, go to the Object Manager, select **Content Version**, then scroll to the fields area. If you're using Salesforce Classic, enter *Salesforce Files* in the `Quick Find` box, then select **Fields**. The data assigned to these fields during upload is available on the content details page for the life of the file. After creating custom content fields, you must assign them to a page layout. The page layout determines which fields appear when a user uploads or revises files in Salesforce CRM Content.

To create a custom content field:

1. Click **New**.
2. Choose the type of field to create, and click **Next**.
3. For relationship fields, associate an object with the field and click **Next**.
4. Enter a field label. The field name is automatically populated based on the field label you enter. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. Ensure the custom field name is not identical to any standard field name for that object.
5. Choose the page layout that should display the field as an editable field.

USER PERMISSIONS
To create, edit, or delete custom fields:
• Manage Salesforce CRM Content
OR
Manage Content Properties

Creating Library Permissions

To create a library permission in Salesforce CRM Content, from Setup, enter *Content Permissions* in the `Quick Find` box, select **Content Permissions**, and then click **Add a Library Permission**.

1. Assign a name to the library permission.
2. Optionally, enter a description of the library permission. If your organization has several library permissions, consider describing each by its function or with a summary of its privileges.
3. In the Permissions section, select the checkboxes that correspond to the privileges you want to grant to users with this library permission, and click **Save**.

USER PERMISSIONS
To create library permissions:
• Manage Salesforce CRM Content
OR
Manage Content Permissions

Library Privilege	Description
Manage Library	Perform any action in the library. This privilege is required to edit a library's name and description, add or remove library members, or delete a library. Manage Library is a super permission which provides all the following

Library Privilege	Description
	permission options listed except `Deliver Content`. Creating a library requires the Manage Salesforce CRM Content app permission or Create Libraries system permission.
Add Content	Publish new content to the library, upload new content versions, or restore archived (deleted) content. Content authors can also change any tags associated with their content and archive or delete their own content.
Add Content on Behalf of Others	Choose an author when publishing content in the library.
Archive Content	Archive and restore any content in the library.
Delete Content	Delete any content in the library. Authors can undelete their own content from the Recycle Bin.
Feature Content	Identify any content in the library as *featured*.
View Comments	Read comments posted to any content in the library.
Add Comments	Post comments to any content in the library and view all comments in the library. Users can edit or delete their own comments.
Modify Comments	Edit or delete comments made to any content in the library.
Tag Content	Add tags when publishing content or editing content details in the library.
Deliver Content	Create a content delivery using any files in the library.
Attach or Share Content	Make content from this library accessible in Chatter. Within Chatter, select a file from the library and attach it to a post or share it.
Organize File and Content Folder	Create, rename, and delete folders in libraries in Lightning Experience.

4. Click **Save**.

Enabling Multilanguage Support

If the **Enable Multilanguage search and contribute** checkbox is selected, a `Language` dropdown list is available on the Salesforce CRM Content page in Setup when users publish, edit, or search for content. The `Language` dropdown list contains all twenty languages that Salesforce supports.

If a user does not choose a language when publishing content, that content is associated with the user's personal language by default. If the user's personal language setting is different from the organization's language, content published by that user is associated with the user's language, not the organization's language.

USER PERMISSIONS

To modify Salesforce CRM Content settings:
- Manage Salesforce CRM Content

Enabling Content Deliveries

1. From Setup, enter *content deliveries and public links* in the `Quick Find` box, and select **Content Deliveries and Public Links**.

2. Click **Edit**, and then select *Content Deliveries feature can be enabled for users,* *Public Links can be enabled for users (Requires Content Deliveries),* and *Content Deliveries and Public Links can be enabled to let communities users share files managed by libraries (Requires Content Deliveries).*

3. Choose a default option for content-delivery passwords. Because users can send content-delivery URLs to leads, customers, or any unauthenticated user, Salesforce recommends requiring password protection if your users plan to send confidential documents via content delivery. The options allow you to select an organization-wide default for content-delivery password protection.

   - **Password protection is optional and defaults to OFF**—If this option is selected, users can choose to require a password when they create a content delivery, but the `Require Password to Access Content` field on the create-delivery wizard is not selected by default.

   - **Password protection is optional and defaults to ON**—If this option is selected, the `Require Password to Access Content` field on the create delivery wizard is selected by default. Users can deselect the option if they don't want to require a password.

   - **Password protection is required**—If this option is selected, a password is generated each time a content delivery is created. Users cannot opt out of the password requirement.

   > **Note:**
   > - If you choose to require a password, users who create a content delivery receive a password when the delivery is generated; users must send the password and the delivery URL to delivery recipients. Delivery recipients are prompted for the password when they click the content delivery URL.
   > - Content delivery passwords display with the content-delivery URL when the delivery is created. You can also access the password on the delivery detail page for the life of the content delivery.
   > - Files within libraries are governed by settings within the library, so they require an extra setting, in addition to the user permissions. To let a user share files managed by a library, enable **Deliver Content** for that user in the library.

After content delivery is enabled, users can add the Content Deliveries related list to their page layouts for leads, business accounts, contacts, opportunities, cases, campaigns, or custom objects. All Salesforce CRM Content users will see a **Deliver Content** option on each content details page.

Implementation Tips

- To ensure quality of service, the total number of content-delivery views allowed within a 24-hour period is limited to 50,000 and the amount of bandwidth allocated to content deliveries is limited to 50 GB. If recipients try to view deliveries after rate limit are exceeded, they'll be prompted to try again later. Salesforce may be able to increase rate limits on an exception basis. For more information, contact your sales representative.

- When you create a content delivery, Salesforce copies the original file and creates a new version of that file specifically for online viewing. Note the following information concerning supported file types:

   - Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint files are supported for online views.

   - Adobe® PDF files are supported for online views, but copy-protected PDFs are not.

   - JPG, BMP, GIF, and PNG are supported for online views.

   - Any document over 25 MB isn't supported for online views.

You can create a content delivery with any file type, but if the file type isn't supported for online viewing, your recipient can only download the document in its original file format.

- Content deliveries require Adobe Flash version 9.0.115. If recipients don't have Flash installed, they can download it.

- Customer portal and parnter portal users can't create content deliveries.

- Only the creator of a content delivery can delete the delivery record or edit details such as the expiration date.

- Each time someone clicks a content delivery's URL, Ssalesforce records the click as one view and distinguishes between internal and external views. An internal view is a view by a Salesforce user. For example, clicking the delivery URL on the delivery detail page or the View option on the Content Deliveries related list is an internal view. The Content Deliveries related list provides a count of all views for each delivery. To see information about a specific view, open the delivery details page.

  Note: For password-protected content deliveries, a view is recorded each time recipients click the delivery URL regardless of whether they enter the password and view the delivery.

- Salesforce CRM Content users can deliver content from shared libraries or a personal library.

Best Practices

- After creating a content delivery, always preview it before sending the URL to your recipients to ensure that the formatting in the original file displays properly in the online version. For example, colors and non-standard fonts don't always display properly in the preview player. If you aren't happy with the quality of the online version, click **Previous** and choose to make your content available in its original file format or as a PDF file only. Your recipients will be able to download the file, and you can use the delivery detail page to track whether recipients download it

- Animation and timings in PowerPoint files aren't supported in the content delivery's online version. Hyperlinks in all file types are also unsupported.

- If you are a Salesforce CRM Content user and want recipients of your content delivery to always see the latest version of a file rather than the version available on the delivery-creation date, open the delivery detail page and click **Edit**. Select the `Content Delivery Opens Latest Version` checkbox.

- If you select `Notify Me of First View or Download`, you'll receive an email when someone views the content delivery for the first time.

Enabling Google Docs

If the Add Google Docs to Salesforce service is enabled for your organization, an Add Google Doc dropdown list on the Libraries tab allows users to add Google documents, spreadsheets, and presentations to their Salesforce CRM Content libraries.

USER PERMISSIONS

Activating the Add Google Docs to Salesforce service:
- Customize Application

  Note: Before you can enable any Salesforce for Google Apps services, you must create a Google Apps account and configure that account's domain settings. From Setup, enter `Google Apps Settings` in the `Quick Find` box, then select **Google Apps Settings**.

To activate or deactivate the Add Google Docs to Salesforce service:

1. In Salesforce Classic Setup, enter `Google Apps Settings` in the `Quick Find` box, then select **Google Apps Settings**.

2. Click **Edit** next to the Add Google Docs to Salesforce option in the Activate Google Apps Services list.

3. Select `Activate`.

4. Read and indicate whether you agree to the Terms of Use.

5. Click **Save**.

Associating Content with Standard and Custom Objects

The Related Content related list allows users to search for content in Salesforce CRM Content and attach it to leads, accounts, contacts, opportunities, products, cases, and custom objects. To use the related list, each user must add it to his or her page layouts for these objects.

To search for content using the Related Content related list:

1. Click **Find Content** or **Search All**. In both cases, Salesforce CRM Content searches within the libraries that you have access to. If you click **Search All**, the search results display all the content in your libraries. For the Find Content search, your search results contain content that is relevant to the record; Salesforce CRM Content searches for content with text or attributes that match the following fields:

   - On an opportunity, the `Opportunity Name`, `Account Name`, and all competitors and products.
   - On an account, the `Account Name` and `Industry`.
   - On a case, the `Case Reason`, `Subject`, `Account Name`, and `Industry`.
   - On a lead, the `Name`, `Company`, `Industry`, and `Title`.

   Note: On a custom object, clicking **Find Content** returns search results that contain the full custom object name in the document's text or attributes. If no content meets this criterion, the search results will be empty and a Search All search should be used instead.

2. On the search results page, filter your results as needed by entering search terms or selecting filter criteria from the sidebar.

3. Click **Attach** for any file that you want to attach to the record.

4. Click the **Back** link to return to the detail page.

Configuring Libraries

After completing the tasks in Configuring Organization Settings, you can create libraries and customize them by restricting record types or selecting a tagging model.

Creating Libraries and Adding Members

Step 1: Create a New Library

1. From the My Libraries section of the Libraries tab home page, click **New**.

2. Enter a unique library name.

3. If you want, add a description.

4. Click **Save and Add Members**.

   📝 Note: If you want to add members later, click the **Save and Close** button.

Step 2: Add Library Members

1. On the **Libraries** tab, click the library name if the library isn't already open.

2. In the **Members** section, click **Add Members**.

3. If the member you want to add isn't listed, type their first name in the search box and click **Find**.

4. Select members from the Available Members box. Members can include individual Salesforce CRM Content users or public groups containing Salesforce CRM Content users.

   💡 Tip: If you have many Salesforce CRM Content users, create a public group and add it to a library rather than adding users to the library individually.

5. To add the members to the library, click **Add**.

6. Click **Next**.

   🔔 Warning: When you add a guest user as a member of the library, the library and files become publicly accessible.

Step 3: Assign Library Permissions to Members

- Select a library permission for each user or public group and click **Save**.

Restricting Record Types in a Library

To restrict the record types allowed in a library:

1. On the Libraries tab, select a library from the **My Libraries** area.

2. Click **Record Types**.

3. Optionally, change the default record type for the library.

4. Select the `Restrict the record types available in the library` checkbox.

5. Select one or both of the following options:

   - `Allow content with any record type to be linked to this library`— Select this option if you want to enable content published in other libraries

USER PERMISSIONS

To create libraries:
- Manage Salesforce CRM Content

  OR

  Create Libraries

To add members to a library:
- Manage Salesforce CRM Content

  OR

  `Manage Library` checked in your library permission definition

To assign library permissions to members:
- Manage Salesforce CRM Content

  OR

  `Manage Library` checked in your library permission definition

USER PERMISSIONS

To restrict record types:
- Manage record types and layouts for Files

  OR

  Manage Salesforce CRM Content

to be shared to the library where you have restricted record types. The content in other libraries can be shared regardless of the record types used.

- `Do not apply record type restrictions to existing content`— Select this option if you don't want to receive warnings regarding existing content in the library. You won't be alerted if existing content uses record types that you exclude from the library. This option refers to notifications only; existing content is not affected by restricted record types.

6. For each record type that you want to allow in the library, move it from the Available Record Types list to the Selected Record Types list, and click **Save**.

Notes on Restricting Record Types

- If the library already contains published content, selecting the `Restrict the record types available in the library` option automatically moves all the record types used by the published content to the Selected Record Types list.

- Deselecting the `Restrict the record types available in the library` option automatically moves any record types in the Selected Record Types list to the Available record Types list.

- When changing a file's managing library, the file's record type must be permitted in the new managing library.

- When sharing a file with a library, the file's record type must be permitted in the shared library unless the `Allow content with any record type to be linked to this library` option is selected for the shared library.

- When the default record type for a user's profile differs from the default record type for a library, the user profile default takes priority when a user with that profile shares a file with the library. *General* is used as the default record type when no default is set for the user profile.

- When there are no record types in common between a user profile and a library, the default record type for a library is available to users with that user profile who are sharing files with the library.

Create Folders in Libraries in Lightning Experience

Create folders in Lightning Experience to organize files that are already in libraries. Upload files to a library by selecting the library and then clicking Add Files. Library folders can also be created, renamed, and deleted using SOAP API.

Get Started with Library Folders

- Folders are enabled by default in any new libraries that you create. Folders are not enabled by default in existing libraries. To enable folders in a library, click the **New Folder** button. Depending on the size of the library, enabling folders can take a few minutes.

    > **Note:** To enable folders in a library, you need the "Manage Salesforce CRM Content" permission. Verify that you're both a member of the library and have Library Administrator permission. You can also use SOAP API to enable folders in libraries.

- In libraries with more than 5,000 files, you can't enable folders.

Anyone with the "Organize File and Content Folder" permission can create, rename, and delete folders. You can view all folders in a library that you have access to, and move files and folders within a library.

You may be able to sort content of some libraries or folders, but not others, in ascending or descending alphabetical order.

> **Note:** Sometimes when you sort folders by the **NAME** or **LAST ACTIVITY** columns, the Asset folder remains at the top of the list. In some cases column headers do not sort the column content. It's not possible to sort contents in every library or folder by clicking either the **TITLE** or **LAST MODIFIED DATE** columns.

USER PERMISSIONS

To add folders to a library:
- Manage Salesforce CRM Content

    OR

    `Manage Library` checked in your library permission definition

	Lightning Experience	Salesforce Classic
Create, rename, and delete library folders	✔	
Move files in a library into folders	✔	
View folders	✔	✔
View libraries	✔	✔
Add files to a library	✔	✔
Create, edit, and delete libraries	✔	✔
Manage library membership	✔	✔

Defining Tagging Rules

In Salesforce CRM Content, tags are descriptive labels that help classify and organize content. Contributors can assign tags to their files, Google docs, or web links, to enable all library members to browse for content by tag. The tagging rule in a library determines how contributors can tag content; for example, the restricted-tagging rule does not allow contributors to create tags. Library tagging rules are optional. By default, library contributors can enter any tag.

To assign a tagging rule to a library:

1. On the Libraries tab, select a library from the **My Libraries** area.

2. Click **Tagging Rules** and choose one of the following options:

Library Tagging Rule	Description
Open Tagging	This rule places no restrictions on tagging. Contributors can enter any tag when publishing or editing content. While a tag is typed, Salesforce CRM Content autosuggests tags based on the contributor's recently used tags and the Popular Tags list.
Guided Tagging	This rule also enables contributors to enter any tag when publishing or editing content, but contributors are also offered a list of suggested tags. If you select Guided Tagging, the next step prompts you to enter the suggested tags that you want to recommend to library contributors.
Restricted Tagging	This rule requires contributors to choose from the list of suggested tags. If you select Restricted Tagging, the next step prompts you to enter the list of suggested tags.

3. If you chose **Guided Tagging** or **Restricted Tagging**, click the link for auto-populating the `Suggested Tags` field and then edit, add, or remove tags as needed. If you do not auto-populate the `Suggested Tags` field, any new tags you enter in the field are added to the existing list of suggested tags in the library.

4. Click **Save**.

Notes on Library Tagging Rules

- `Open Tagging` is the default tagging rule.

- If you publish, share, or move content to a library that uses restricted tags, you will receive an error if your content contains unsupported tags.

- When you share content from one library to another, the most restrictive tagging rule applies. For example:

    - When content is shared between a restricted-tagging library and a guided- or restricted-tagging library, you can only choose tags that are common to both libraries.

    - When content is shared between an open tagging library and a restricted-tagging library, you can only choose tags suggested in the restricted-tagging library.

- If a restricted tagging rule is applied after content has already been published in the library and the existing content contains tags that are no longer permitted by the rule, the tags remain assigned to the content until it is edited or revised. For example, if the `Q3Forecast` document has a *market indicators* tag and *market indicators* is not a suggested tag according to the new restricted-tagging rule, *market indicators* is removed from `Q3Forecast` only when a user publishes a new version of the file or edits the file's tags on the content details page.

- Don't use too many tags. The search engine helps users find specific content. Tags enable users to browse and subscribe. Excessive tagging creates unnecessary clutter.

- You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.

- Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.

Enabling Salesforce CRM Content in Portals

Salesforce CRM Content is available in the partner portal. Two levels of access to Salesforce CRM Content can be granted to portal users:

- Portal users without a Salesforce CRM Content feature license can download, rate, comment on, and subscribe to content if they have the "View Content on Portals" user permission. They cannot view potentially sensitive data such as usernames, download history, and version history. The content delivery feature is not available to portal users.

- Portal users with a Salesforce CRM Content feature license can access all Salesforce CRM Content features granted by their library permission(s), including contributing content, moving and sharing content among libraries, and deleting content. They can also view Salesforce CRM Content reports. The content delivery feature is not available to portal users.

Enabling Salesforce CRM Content in the Partner Portal

USER PERMISSIONS

To set up and update the partner portal:	Customize Application
To create and edit profiles:	Manage Profiles and Permission Sets
To manage partner portal users:	Manage External Users

To create Salesforce CRM Content library permissions:	Manage Salesforce CRM Content OR Manage Content Permissions
To add users to a Salesforce CRM Content library:	Manage Salesforce CRM Content OR `Manage Library` checked in your library permission definition

Before enabling Salesforce CRM Content in the partner portal, you must create and enable a partner portal.

Enable Salesforce CRM Content for Non-Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:

    a. Include the "View Content on Portals" user permission.

    b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.

    c. Assign the updated profile to partner portal users as needed.

2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

    > 📝 Note: A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.

4. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.

5. Add the Salesforce CRM Content tabs to each partner portal.

    > 📝 Note: The Documents tab is not part of Salesforce CRM Content.

Enable Salesforce CRM Content for Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:

    a. Optionally, add the "Create Libraries" user permission if you want to allow portal users to create and administer new libraries.

    b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.

    c. Assign the updated profile to partner portal users as needed.

2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each partner portal user.

3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

> 📝 Note: A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.

5. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.

6. Add the Salesforce CRM Content tabs to each partner portal.

> 📝 Note: The Documents tab is not part of Salesforce CRM Content.