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# Support Your Customers

Salesforce, Winter '16





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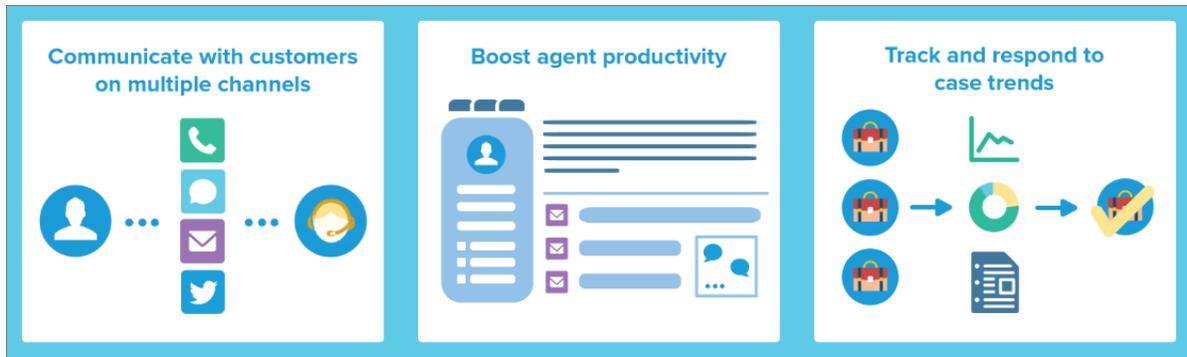


# SUPPORT YOUR CUSTOMERS

## Salesforce Service Cloud

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Wow your customers with awesome service and boost support agent productivity.



Give your customers their favorite choice of communication with your team, whether by web, email, phone, social media, and more. Make life easier for your support agents by automating processes like case assignment, notifications, escalations, milestones, service contracts, and more. And, give your team a unified help desk from which to see a 360-degree view of each customer case and the tools to resolve them quickly.

[Learn Service Cloud Basics with Trailhead!](#)

## Case Management

A case is a customer's question or feedback. Customize and automate case support processes for faster response times and happier customers.

- [Case Teams Overview](#)
- [Case Queues Overview](#)
- [Response Rules Setup](#)
- [Escalation Rules Overview](#)
- [Assignment Rules Setup](#)
- [Omni-Channel Overview](#)
- [Macros Setup](#)

## Knowledge Base

Create, share, and find relevant information faster to deliver awesome customer service.

- [Knowledge Overview](#)
- [Knowledge Setup](#)

## Multi-Channel Support

Make customers happier by offering them many choices in how to reach your support team.

- [Web-to-Case Setup](#)
- [Email-to-Case Overview](#)
- [Question-to-Case Setup](#)
- [LiveAgent Setup](#)
- [Online Communities Overview](#)
- [Call Center Overview](#)
- [Open CTI Overview](#)
- [Social Customer Service Overview](#)
- [SOS Setup](#)

## Unified Help Desk for Support

Boost support agent productivity with a dashboard-like interface that supports multiple cases across every service channel.

- [Case Feed Overview](#)
- [Salesforce Console Overview](#)
- [Custom Console Components Overview](#)

## Customer Support Agreements

Represent and enforce service-level agreements like warranties, subscriptions, or maintenance agreements with entitlement management.

- [Entitlements Overview](#)
- [Entitlement Management Setup](#)

# Tracking Customer Inquiries

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## Cases

### Cases

A case is a customer's question or feedback. Support agents can review cases to see how they can deliver better service. Sales reps can use cases to see how they affect the sales process. Responding to cases keeps your customers happy and enhances your brand.

Your administrator can set up communication channels to gather cases from customers' preferred forms of contact. Channels include Communities for online forums, Email-to-Case for emails, Web-to-Case for websites, Salesforce Call Center for phone calls, and more. Some channels aren't available for Lightning Experience.

From the Cases home page, you can create, locate, and edit cases and also sort and filter cases and queues using standard and custom list views.

 **Tip:** If a Salesforce console is set up, you can use its dashboard-like interface to respond to multiple cases faster. If entitlements are set up, you can check whether customers are eligible for support or if cases are close to violating a milestone. If Salesforce to Salesforce is set up and cases are shared with external contacts, choose one of the list views to see cases that your business partners have shared with you. These features are available only in Salesforce Classic.

#### SEE ALSO:

[Cases Home](#)

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

[Case Management Implementation Guide](#)

#### EDITIONS

Available in both: Salesforce Classic and Lightning Experience

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## Cases Home

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

In addition, case home lets you jump to case reports and mass delete cases or mass email contacts on cases.

### SEE ALSO:

- [Cases](#)
- [Guidelines for Working with Cases](#)
- [Creating Cases](#)
- [Cloning Cases](#)
- [Close Cases](#)
- [Deleting Cases](#)

## Viewing Case Lists

The cases list page displays a list of cases in your current view. To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.

If the Salesforce console is set up, view case lists by selecting Cases from the navigator tab (if Cases is available).

- Click **Edit** or **Del** to [edit or delete a case](#).
- If Chatter is enabled, click  or  to follow or stop following a case in your Chatter feed.
- Click **New Case** or select **Case** from the Create New drop-down list in the sidebar to [create a case](#).
- Select the box next to one or more cases and then use the buttons at the top of the view to [close the cases, take ownership of them, or change the case status or owner](#).

 **Note:** Cases with a red arrow have been automatically escalated via your organization's escalation rules.

## Taking Ownership of Cases

To take ownership of cases in a queue, view the queue list view, check the box next to one or more cases, and then click **Accept**. Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can grant additional access to cases beyond what the sharing model allows.

 **Note:** The organization-wide sharing model for an object determines the access users have to that object's records in queues:

### Public Read/Write/Transfer

Users can view and take ownership of records from any queue.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- "Read" on cases

To create cases:

- "Create" on cases

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view case lists:

- "Read" on cases

To create cases:

- "Create" on cases

**Public Read/Write or Public Read Only**

Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

**Private**

Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the “Edit” permission to take ownership of records in queues of which they are a member. Administrators, users with the “Modify All” object-level permission for Cases, and users with the “Modify All Data” permission, can view and take records from any queue regardless of the sharing model or their membership in the queue.

## SEE ALSO:

[Cases](#)

[Guidelines for Working with Cases](#)

**Changing Multiple Cases**

From any case list page, administrators can “mass update” multiple cases at once. From any queue list view, users can take ownership of one or more cases if they are a member of that queue, if they are higher in the role or territory hierarchy than a queue member, or if the organization’s default sharing for cases is Public Read/Write/Transfer. Simply check the boxes next to the desired cases and click the appropriate button. The following actions are possible:

- **Accept**—Assigns you as the owner of the selected cases in a queue list view. Any attached open activities are transferred to you as well. In organizations that do not have the Public Read/Write/Transfer sharing model for cases, you can take cases only from queues of which you are a member or if you are higher in the role hierarchy than a queue member.
- **Change Owner**—Assigns the cases to the one user or queue you specify. Any attached open activities are transferred to the new owner as well. When putting cases in a queue, the open activities are not transferred.

In addition to the required user permissions for this feature, you must have read sharing access to the cases you are updating.



**Note:** When you change case ownership, any associated open activities that are owned by the current case owner are transferred to the new owner.

- **Close**—Closes the selected cases using the values you specify. You can set a common `Status` and `Reason` and add any comments.

You must have the “Manage Cases” permission and read/write sharing access to the cases to use this feature.

- **Change Status**—Changes the `Status` of the cases to the value you set.

You must have the “Manage Cases” permission and read/write sharing access to the cases to use this feature.

## SEE ALSO:

[Guidelines for Working with Cases](#)

**EDITIONS**

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

**USER PERMISSIONS**

To change case owner:

- “Transfer Cases” OR “Transfer Record”

AND

“Edit” on cases

To close and change the status of cases:

- “Manage Cases”

## Creating Cases

You can create cases in various ways:

- Your administrator can set up Web-to-Case and either Email-to-Case or On-Demand Email-to-Case to automatically capture cases from your website and customer emails.
- Your customers can log their own cases from a community, Customer Portal, Self-Service portal, or Chatter Answers.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

- You can create cases manually from the Cases tab, the Cases related list, or, depending on how your administrator has set up your organization, in the feed on record detail pages.
- If you have an answers community, you can [escalate an unanswered or problematic question](#) into a new case.

You may have to verify that contacts are eligible to receive customer support, or that a service contract includes an entitlement, before you create or update cases. If so, see [Verifying Entitlements](#) on page 103.

To create a new case for a support email or phone call:

1. Use Search to find the individual's account and then locate the contact in the Contacts related list.

If the contact doesn't exist, create a new contact for that account.

2. Click **New** in the Cases related list of the contact.

If your organization uses record types, you might be prompted to choose a `Record Type` when creating a case. Different record types can have different fields and different picklist values.

3. Enter information for the case.

When you enter or select a contact for the `Contact Name` field, the `Account Name` field defaults to the account associated with the contact when you save the case. However, you can change the account in the `Account Name` field during subsequent updates.

4. To associate the case with an asset:

- a. Click the **Asset** lookup icon. Initially, the asset lookup lists all assets for the contact if one is selected. Enter search criteria and click **Go!** to refine this list.
- b. Select an asset from the assets listed to associate it with the case.
- c. If you do not find a matching asset, click **New** to create a new asset from the lookup dialog and associate it with the new case. The **New** button displays if your organization has enabled Quick Create and you have the "Create" permission on assets.
- d. To associate the new asset with a product, enter your product search criteria and click **Go!** or select a product from the list of matches. Click **Skip** if you do not want to associate the asset with a product.
- e. Enter the asset details and click **Save**.

5. If enabled by your administrator, you can associate the case with another case. Simply type the case number of the parent in the `Parent Case` field. Alternatively, you can click the lookup icon to search for a case's case number.

When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

### EDITIONS

Available in: Salesforce Classic

Case assignment rules, Web-to-Case, Email-to-Case, and the Self-Service portal are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To view cases:

- "Read" on cases

To create cases:

- "Create" on cases

6. Depending on how your organization is set up, you may be able to:
    - Deselect `Visible in Self-Service Portal` if you don't want the case to be available in the Self-Service portal.
    - Select `Assign using active assignment rules` to automatically assign the case using your organization's active assignment rule. If `Assign using active assignment rules` is selected and no assignment rule criteria is met, the case is assigned to the Default Case Owner. If you do not select the checkbox, you are assigned as the owner.  
  
If `Assign using active assignment rules` is selected by default and you deselect it, you override your organization's default assignment rules and you're assigned as the owner.
    - Select `Send notification email to contact` to automatically send an email to the contact indicating that the case was created.
  7. If Spell Checker is enabled for your organization, click **Check Spelling** to spell-check the contents of the `Description` field. Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.
  8. Click **Save** to save the case, or click **Save & New** to save the case and create another. Alternatively, click **Save & Close** to save and close the case immediately. This sets the `Closed When Created` field on the case, which indicates that the case was closed during creation.
-  **Note:** When you save a newly-created case with the assignment rule box checked, the record type of the case might change, depending on what behavior your administrator specified for assignment rules.

If your organization uses divisions, the division of a new case is automatically set to the division of the related contact.

SEE ALSO:

[Cloning Cases](#)

[Case Fields](#)

[Cases Home](#)

[Solving Cases](#)

## Guidelines for Working with Cases

A case is a customer question or feedback. The fields and related lists you see on a case are determined by your customizations or features set up by your administrator. Learn how you can get the most out of working with cases.

### Updating Cases

When you change a contact, the account doesn't update to the contact's account, but you can edit the account yourself.

Contacts who are portal users can only view cases associated with the account on their contact record.

When you change an account, manual shares on a case are deleted for users who don't have read access on the new account.

If set up, select **Send notification email to contact** to let the contact know that you've updated the case. An email is sent only if you have access to the contact.

If set up, select **Assign using active assignment rules** to reassign a case using an assignment rule. If the case doesn't match rule criteria, it's reassigned to your organization's default case owner.

If set up, click **Sharing** to share a case with other users, groups, or roles.

If set up, close a case by selecting Closed under **STATUS**. Otherwise, click **Close Case** and change any fields as needed. If knowledge article submissions are set up, click **Save and Create Article** to store information that would help others close similar cases. When the draft article you submit is published, it's attached to the case and available in the knowledge base for easy reference.

If set up, a Web-to-Case Information section lists information entered by the customer who created the case from a website form.

### Using Case Related Lists

To reply and work with cases created from Email-to-Case, use the Emails related list.

To view the required steps in a support process or to add the date of a completed milestone, use the Case Milestones related list.

To find articles from your organization's knowledge base to help solve a case, use the Articles related list. To initiate a search, type keywords. Attach relevant articles to the case to track solutions and help others solve similar cases. Attached articles appear on the related list. If you create a draft article while closing a case, the article appears on the related list after the draft article is published.

To find solutions (version 1.0 of articles) to help solve a case, use the Solutions related list. If solution categories are set up, choose them to refine your search, along with keywords. If suggested solutions are set up, click **View Suggested Solutions** to see relevant solutions. The solutions are suggested based on relevancy and case similarity.

### Replying to Cases from Chatter Answers (Not Available in Lightning Experience)

To reply to a case converted from a question on a web community, type your response in the Chatter-like feed, and click **Answer Customer**. Your response is tracked on the Case Comments related list.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Case assignment rules, case escalation rules, web-to-case, and customer portals are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions.

#### USER PERMISSIONS

To view cases:

- "Read" on cases

To update cases:

- "Edit" on cases

Case comments marked `Public` display as private messages from customer support in Chatter Answers. They don't display to the entire community. For example, if a support agent adds a public case comment, it displays only to the case's contact private messages in Chatter Answers. Support agents can read all private and public case comments.

**SEE ALSO:**[Case Fields](#)[Case History](#)[Case Comments](#)[Assigning Cases](#)[Working with Case Emails](#)[Using the Case Milestones Related List](#)[Using the Chatter Answers Q&A Tab](#)

## Case Comments

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

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

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

**SEE ALSO:**[Creating and Editing Case Comments](#)

### EDITIONS

Available in: **Salesforce Classic**

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## Creating and Editing Case Comments

You can create or edit a case comment from:

- [The Internal Comments field on a case edit page](#)
- [The Case Comments related list on a case detail page](#)

SEE ALSO:

[Cases](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view case comments:

- "Read" on cases

To add case comments and make case comments public:

- "Edit" or "Create" on cases

To edit or delete case comments added by other users:

- "Modify All" on cases

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

- "Edit Case Comments"

## Creating and Editing Case Comments on Case Detail Pages

1. Click **New** or **Edit** on the Case Comments related list.
2. Optionally, select `Public` to enable comment notifications to the contact on the case, and to let the contact view the comment on the Customer Portal or Self-Service.
3. Type comments in `Comment`.

4. Click **Save**.

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

 **Note:** If you publish cases and case comments to external contacts via Salesforce to Salesforce, all public case comments are automatically shared with a connection when you share a case. To stop sharing a comment, select **Make Private**.

 **Tip:** On the Case Comments related list:

- Click **Del** to delete an existing comment.
- Click **Make Public** or **Make Private** to change the public status of a comment on the Customer Portal or Self-Service portal. Case comments marked `Public` display as private messages from customer support in Chatter Answers. They don't display to the entire community. For example, if a support agent adds a public case comment, it displays only to the case's contact private messages in Chatter Answers. Support agents can read all private and public case comments.

### SEE ALSO:

[Case Comments](#)

[Creating and Editing Case Comments](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view case comments:

- "Read" on cases

To add case comments and make case comments public:

- "Edit" or "Create" on cases

To edit or delete case comments added by other users:

- "Modify All" on cases

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

- "Edit Case Comments"

## Creating and Editing Case Comments on Case Edit Pages

1. Click **New** on the Cases tab to create a case, or select an existing case and click **Edit**.
2. Type your comments in `Internal Comments`.
3. Optionally, select `Send Customer Notification` to email the contact on the case of your new public comment.
4. Click **Save**.

An email is sent to the case owner whenever a case comment is created or updated.

 **Note:** `Send Customer Notification` displays on case edit pages when:

- An administrator has enabled case comment notification to contacts on Support Settings or Self-Service Portal settings pages.
- The comment is marked `Public`.
- There's a contact on the case.
- The contact on the case has a valid email address.

SEE ALSO:

[Case Comments](#)

[Creating and Editing Case Comments](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view case comments:

- "Read" on cases

To add case comments and make case comments public:

- "Edit" or "Create" on cases

To edit or delete case comments added by other users:

- "Modify All" on cases

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

- "Edit Case Comments"

## Case History

The Case History related list of a case detail page tracks the changes to the case. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the case, a new entry is added to the Case History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the case are not tracked in the case history.

 **Note:** Changes to the `Closed When Created` field are only tracked when the field is updated via the Force.com API.

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, for automated case changes that result from Web-to-Case or case assignment or escalation rules, the user listed in the history is the `Automated Case User` chosen in the Support Settings.

SEE ALSO:

[Cases](#)

## Case Fields

Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Field	Description
	Indicates that an escalation rule escalated a case. The escalation icon disappears when a case is closed or no longer meets escalation rule criteria.
	Indicates that a customer added a comment to a case from a web portal. The icon appears until the case owner views the case.
<code>Account Name</code>	Name of the account associated with a case's contact. The name is added when you link the case to a contact and save the case. When updating a case, you can add a different account.
<code>Asset</code>	The customer's product model. On edit pages, this field shows only assets associated with a case's contact, but you can use inline editing to see a list of all assets on a case.
<code>Business Hours</code>	Indicates the hours at which escalation actions or entitlement processes run on a case.
<code>Case Currency</code>	The currency for all currency amounts on a case. Amounts display in the case currency and are also converted to your personal currency. Only

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- "Read" on cases

### EDITIONS

Available in both: Salesforce Classic and Lightning Experience

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
	available for organizations that use multiple currencies.
Case Division	The division to which a case belongs. Division is inherited from a case's contact. If it has no contact, it's set to the default global division. Only available in organizations that use divisions to segment data.
Case Number	Unique number assigned to the case. Numbers starts at 1000 and are read only, but administrators can change the format. Case numbers often increase sequentially, but sometimes they skip numbers in a sequence.
Case Owner	User assigned to own a case.
Case Record Type	Field name that determines the picklist values available on a case. Record types are often related to a support process.
Closed by Self-Service User	Indicates if a case's contact closed the case from a web portal. This field is read only.
Closed When Created	Indicates if a case was closed during creation using the <b>Save and Close</b> button. This field is read only.
Contact Email	Email address of a case's contact. The address is added when you add a contact to a case. This field is read only.
Contact Mobile	Mobile phone number of a case's contact. The number is added when you add a contact to a case. This field is read only.
Contact Name	Name of a case's contact.
Contact Phone	Phone number of a case's contact. The number is added when you add a contact to a case. This field is read only.
Created By	User who created a case, including creation date and time. This field is read only.
Custom Links	Lists of custom links for cases created by an administrator.
Date/Time Closed	Date and time that a case was closed. This field is read only.
Date/Time Opened	Date and time that a case was opened. This field is read only.
Description	Description of a case,- usually a customer question or feedback. This field can store up to 32 KB of data, but only the first 255 characters display in reports.
Entitlement Name	Name of an entitlement added to a case. Only available if entitlements are set up.
Entitlement Process Start Time	The time the case entered an entitlement process. If you have "Edit" permission on cases, you can update or reset the time. When you reset the time: <ul style="list-style-type: none"> <li>• Closed or completed milestones aren't affected</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>Incomplete milestones are recalculated based on the new start time</li> </ul> <p>If an entitlement process applies to a case, this field appears.</p>
Entitlement Process End Time	The time a case exited an entitlement process. If an entitlement process applies to a case, this field appears.
Internal Comments	Internal notes related to a case. Each comment can store up to 4 KB of data and appears on the Case Comments related list. Comments marked "public" can appear on web portals.
Milestone Status	A milestone is a step in an entitlement process. If an entitlement process applies to a case, this field appears.
Milestone Status Icon	<p>Indicates a milestone's status on a case by displaying one of the following icons:</p> <ul style="list-style-type: none"> <li> Compliant</li> <li> Open Violation</li> <li> Closed Violation</li> </ul> <p>If an entitlement process applies to a case, this field appears.</p>
Modified By	User who last changed a case, excluding any changes made to a case's related list items. This field also includes the date and time of the change. This field is read only.
Origin	Source of a case, for example, phone, email, or web. Administrators set field values, and each value can have up to 40 characters. When editing a case created from a community with quick actions, add an origin because it isn't set by default.
Parent Case	A case above one or more related cases in a case hierarchy. A case number identifies a parent case, and a parent case must exist before you can add it to another case.
Priority	Urgency of a case. Administrators set field values, and each value can have up to 20 characters.
Product	Name of a case's product. This field is only available if entitlements are set up to include products.
Question	A question on the Q&A tab that is related to a case. This field is populated when you create a case from a question or a question is escalated to a case.
Reason	The reason a case was created. Administrators set field values.
Status	Status of a case, for example, open or closed. Administrators set field values.
Stopped	Lets you stop an entitlement process on a case, which might be necessary if you're waiting for a customer's response. You can stop

Field	Description
	an entitlement process up to 300 times. If an entitlement process applies to a case, this field appears.
Stopped Since	Shows the date and time an entitlement process was stopped on a case. If an entitlement process applies to a case, this field appears.
Subject	Brief description of the customer's question or feedback, for example, <code>Printing Gives Error on Internet Explorer</code> .
Timeline	<p>How far along a case is to reaching an entitlement process's milestones. You can click or hover your mouse pointer over each milestone to view its details. These icons represent milestones:</p> <ul style="list-style-type: none"> <li>•  Completed milestone</li> <li>•  Violated milestone</li> </ul> <p>You can drag the Handle icon () along the Timeline Zoom tool to view past and future milestones. If an entitlement process applies to the case, this field appears.</p>
Type	Type of case, for example, question or problem. Administrators set field values.
Visible in Self-Service Portal	Indicates if a case is visible to users in a web portal. If you want web-generated cases visible in a portal, include this field in Web-to-Case setup.
Web Company	Company name provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Email	Email address provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Name	Customer's name as provided by a customer who created a case from Web-to-Case or Email-to-Case.
Web Phone	Phone number provided by the customer who created a case from Web-to-Case or Email-to-Case.

## SEE ALSO:

[Guidelines for Working with Cases](#)

## How is the “Age” calculated in case reports?

The Age of an open case is the time that has elapsed from its creation to the present. The Age of a closed case is the elapsed time from its creation to the time it was closed. Case reports display a drop-down list labeled “Units” that lets you choose to view the Age in days, hours, or minutes.

SEE ALSO:

[Case Fields](#)

## Using the Case Milestones Related List

The Case Milestones related list on a case detail page displays a list of milestones that automatically apply to the case due to an entitlement process. Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases.

### Note:

- `No records to display` appears in the related list if no milestones apply to the case.
- The related list contains fields that your company has chosen to display, based on its business processes. Depending on your company's requirements, you may see some or all of the following fields.

### Action

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

 **Note:** Customer Portal users can't edit case milestones.

### Milestone

The name of a set of steps in an entitlement process that applies to the case. Users with the “Manage Entitlements” permission can click a milestone's name to view the entitlement process, case criteria, time triggers, and actions associated with it.

The following table lists the types of actions associated with milestones:

Action Type	Description
 Success Actions	The actions to take when a milestone successfully completes.
 Warning Actions	The actions to take when a milestone is near violation.
 Violation Actions	The actions to take when a milestone is violated.

Administrators can set up milestones to automate the following for each action type:

Automation Type	Description	Example
Task	Assigns a task to a specific user. You can specify the task's <code>Subject</code> , <code>Status</code> , <code>Priority</code> , and <code>Due Date</code> .	Create a task for a support rep to call a customer when a first response is violated.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view case milestones:

- “Read” on cases

To edit case milestones:

- “Edit” on cases

Automation Type	Description	Example
Email Alert	Emails a specific template to a designated recipient.	Notify case owners when their cases are near violation of a first response.
Field Update	Changes the value of a selected field. You can specify a value or create a formula for the new value.	Update the case <code>Priority</code> field to <i>High</i> when a first response is near violation.
Outbound Message	Sends a message to a designated endpoint. You can also specify a username and the data you want to include in the message.	Send data about parts or services to an external system after a first response is successful.

**Start Date**

The date and time that the milestone tracking started.

**Target Date**

The date and time to complete the milestone.

**Completion Date**

The date and time the milestone was completed.

**Target Response**

Shows the time to complete the milestone. Automatically calculated to include any business hours on the case. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

**Time Remaining**

Shows the time that remains before a milestone violation. Automatically calculated to include any business hours on the case. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

**Elapsed Time**

Shows the time it took to complete a milestone. Automatically calculated to include any business hours on the case. Elapsed Time is calculated only after the Completion Date field is populated. Depending on your company's business requirements, the time can appear in minutes, hours, or days.

**Violation**

Icon () that indicates a milestone violation.

**Time Since Target**

Shows the time that has elapsed since a milestone violation. Automatically calculated to include any business hours on the case. You can choose to display the time in days, hours and minutes, or minutes and seconds.

**Completed**

Icon () that indicates a milestone completion.

Because they're part of a case's history, completed milestones remain on a case even if they're no longer applicable.

**SEE ALSO:**

[Case Fields](#)

## Searching for Cases

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

You can also create a case list view to find cases that match specific criteria.

SEE ALSO:

[Cases](#)

## Cloning Cases

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

1. Click **Clone** on an existing case.
2. Enter or change any information for the new case.
3. Check the box to assign the case automatically using your active assignment rule.
4. Click **Save**.

 **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

[Case Fields](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- "Read" on cases

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To clone cases:

- "Create" on cases

## Deleting Cases

To delete a case, click **Del** next to the case on the cases list page, or click **Delete** on the case detail page. The **Del** link and **Delete** button do not display for users who do not have the “Delete” permission on cases.

When you delete a case, all related events and tasks, case comments, and attachments are also deleted. Associated contacts, accounts, and solutions are not deleted with the case. The deleted case is moved to the Recycle Bin. If you undelete the case, any related items are also restored.

-  **Note:** If you delete an event, task, case comment, or attachment from a case—and then delete the case—the event, task, case comment, or attachment cannot be restored via undelete.

SEE ALSO:

[Cases](#)

## Assigning Cases

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

- **Using an Assignment Rule for Web-to-Case, Email-to-Case, or On-Demand Email-to-Case**

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, web- and email-generated cases are automatically assigned to users or queues based on criteria in your active case assignment rule.

Cases that do not match the assignment rule criteria are automatically assigned to the `Default Case Owner` specified in the Support Settings.

- **Using an Assignment Rule when Creating or Editing a Case**

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, when creating or editing a case, you can check a box to assign the case automatically using your active case assignment rule. An email is automatically sent to the new owner if your administrator specified an email template in the matching rule entry. If you want this checkbox to be selected by default, your administrator can modify the appropriate page layout. If required, your administrator can edit the page layout to hide the assignment checkbox but still force case assignment rules.

- **Changing Ownership of Multiple Cases (administrators only)**

From any case list page, an administrator, or a user with the “Manage Cases” permission, can manually assign one or more cases to a single user or queue.

- **Taking Cases from a Queue**

To take ownership of cases in a queue, go to the queue list view, check the box next to one or more cases, and click **Accept**.

-  **Note:** The organization-wide sharing model for an object determines the access users have to that object's records in queues:

**Public Read/Write/Transfer**

Users can view and take ownership of records from any queue.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To delete cases:

- “Delete” on cases

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view cases:

- “Read” on cases

To take ownership of cases from queues:

- “Edit” on cases

**Public Read/Write or Public Read Only**

Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

**Private**

Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the “Edit” permission to take ownership of records in queues of which they are a member. Administrators, users with the “Modify All” object-level permission for Cases, and users with the “Modify All Data” permission, can view and take records from any queue regardless of the sharing model or their membership in the queue.

- **Changing Ownership of One Case**

To transfer a single case you own or have read/write privileges to, click **Change** next to the `Case Owner` field on the case detail page, and specify a user, partner user, or queue. Make sure that the new owner has the “Read” permission on cases. The **Change** link displays only on the detail page, not the edit page.

In Group, Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, check the `Send Notification Email` box to automatically send an email to the new case owner.

- **Creating a Case Manually (default assignment)**

When you create a case from the Cases tab, you are automatically listed as the case owner, unless the assignment rule checkbox is displayed and you select it to enable the assignment rule. If it’s selected by default, you can override the assignment rule and assign yourself as the owner by deselecting the checkbox.

SEE ALSO:

[Guidelines for Working with Cases](#)

[Changing Multiple Cases](#)

## Sharing Cases

Your administrator defines the default sharing model for your entire organization. You can change this model to extend sharing to more users than the default set by your administrator. However, you cannot change the sharing model to make it more restrictive than the default.

To view and manage sharing details, click **Sharing** on the case detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the case. On this page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.
- Click **Add** to grant access to the record for other users, groups, roles, or territories.
-  **Note:** To share a case with another user, that user must have access to the account associated with the case and the “Read” permission on cases.
- Click **Expand List** to view all users that have access to the record.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- “Read” on cases

- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

SEE ALSO:

[Cases](#)

## Case Feed

### Case Feed Overview

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes actions and a Chatter feed. The actions let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case.

Agents assigned to a Case Feed page layout see a page that looks like this each time they view a case:

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

The screenshot shows a Salesforce Case Feed interface for a case titled "Having issues syncing between devices, which ...". The interface is divided into several sections:

- 1 Highlights Panel:** Located at the top left, it displays customer information (Edward Stamos, Acme, (212) 555-5555), case details (Case Number 00001009, Created Date 7/9/2013 10:32 AM), and case metadata (Status New, Priority Medium, Case Owner Karen Williams).
- 2 Feed and Detail Views:** A tabbed interface with "Feed" selected and "Details" as an alternative view.
- 3 Publisher:** A row of action buttons including "Email", "Log a Call", "Portal", "Change Status", and "Post".
- 4 Articles Tool:** A section for finding and attaching Knowledge articles to the case.
- 5 Feed Filters:** A search bar and "Show All Updates" dropdown to filter feed items.
- 6 Feed Item:** A call log entry from Karen Williams stating: "Edward called and reported that his phone is using iOS 6.1, so that shouldn't be the issue here. I'm going to escalate to Patrick so he can do more troubleshooting."
- 7 Followers:** A section showing the user is "Following" the case and a "Followers" list with a "Show All (1)" link.
- 8 Custom Links:** A section for adding links, currently showing "Google".

- **Highlights Panel (1)**—Provides an overview of the most important information about a case, such as the contact information, case name, case description, status, priority, and case owner. Agents can use the column dividers to resize sections of the highlights panel so they can see more of the info that's most relevant.
- **Feed and Detail Views (2)**—From the feed view, which includes the publisher and feed, agents can easily switch to the case detail view to see more in-depth information and work with related lists.
- **Publisher (3)**—Contains the actions agents use to work with cases, such as the Email, Case Note, and Change Status actions.
- **Articles Tool (4)**—Lets agents find Knowledge articles that can help them resolve cases, and then attach them to a case or email them to customers.
- **Feed Filters (5)**—Help agents quickly find specific information in the feed by limiting the feed items that appear.

- **Feed (6)**—Offers a chronological view of the case’s history. Feed items are created for:
  - Incoming and outgoing email related to the case
  - Comments related to the case on a customer portal or Chatter Answers
  - Calls logged about the case
  - Changes to the case status
  - Comments made on the case
  - Links or files added to the case
  - Milestone activity related to the case
  - Case actions that result from workflow events
  - New tasks and events related to the cases
- **Follow Button and Followers List (7)**—Let agents follow the case so they’re notified in Chatter of updates to it, and let them see other followers.
- **Custom Buttons and Links (8)**—Give agents access to more tools and functionality.

Administrators can customize most aspects of Case Feed, including

- The fields in the highlight panel
- The actions that appear and the fields they include
- The feed filters that are available and where on the page the list appears
- The width of the feed
- The tools, custom buttons, and custom links that are available, and where on the page they appear

SEE ALSO:

[Case Feed and Related Lists](#)

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

## Using Feed Filters in Case Feed

Feed filters make it easy for support agents to see all updates of one type, such as all call logs or all email messages, when working with cases in Case Feed. By using filters, agents can find the information they need more quickly, without having to browse through each case event.

When creating or editing feed layouts, administrators can specify which filters are available:

- Choosing only **All Updates** automatically shows all events on a case and hides the list of individual feed filters. Use this option if you want support agents to see the complete history of a case.
- Choosing only one type of feed filter automatically shows only case events of that type and hides the list of individual feed filters. For example, if you select only **All Emails**, the feed for each case shows the email messages related to the case but not case notes, portal replies, or other activities. This option is useful for agents who provide support primarily by one channel—phone, email, or portal—and who need to see case events only for that channel.
- Choosing more than one type of feed filter shows a list of available filters in the left sidebar of the Case Feed page or above the feed in the center of the page, with the first filter selected by default. For example, if you make the **All Emails**, **Status Changes**, and **Portal Answers** filters available, the feed for each case shows, by default, the email messages related to the case; users

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

can click the other filters to see other types of case events. Use this option if your agents tend to provide support in one channel but also need to be able to see other types of case updates.

In addition, administrators can specify how and where the list of feed filters appears:

- As a fixed list in the left column.
- As a floating list in the left column. With this option, the feed filters list remains visible as users scroll down the page. This can be useful with long feeds, as it lets agents quickly filter case activities from anywhere on the page, without having to scroll to the top.
- As a drop-down list in the center column.
- As in-line links in the compact feed view. This option is available only for compact feed view.

SEE ALSO:

[Case Feed Overview](#)

## Case Feed and Related Lists

In the traditional case interface, support agents complete tasks such as logging calls and sending emails primarily by working with related lists. In Case Feed, agents can do several of these tasks directly in the feed.

Here's an overview of the most common related lists included in the traditional case interface, the tasks agents do from them, and where agents can complete those tasks in Case Feed.

### Activity History

Task	Case Feed Feature Agents Use for this Task
Logging a call	Log a Call action in the publisher
Viewing call logs	Call log feed items
Creating and replying to customer emails	<ul style="list-style-type: none"> <li>• Email action in the publisher</li> <li>• Emails related list</li> </ul>
Viewing emails	<ul style="list-style-type: none"> <li>• Email feed items</li> <li>• Activity History related list</li> <li>• Emails related list</li> </ul>

### Approval History

Task	Case Feed Feature Agents Use for this Task
Submitting a case for approval	Approval History related list
Viewing approval history	Approval History related list

### Attachments

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Task	Case Feed Feature Agents Use for this Task
Attaching files to a case	<ul style="list-style-type: none"> <li>Articles tool (to attach Salesforce Knowledge articles)</li> <li>Attachments related list</li> </ul>
Attaching files to an email	<ul style="list-style-type: none"> <li>Email action in the publisher</li> <li>Emails related list</li> </ul>
Viewing files attached to a case	<ul style="list-style-type: none"> <li>Attachment feed items</li> <li>Attachments related list</li> </ul>

 **Note:** Attachments to case notes aren't included in the Attachments related list.

### Case Comments

Task	Case Feed Feature Agents Use for this Task
Creating an internal case note	Post action in the publisher  In Case Feed private comments have been replaced by case notes, which are Chatter posts and aren't available from the Case Comments related lists.
Viewing case notes	Post feed items
Creating a public customer comment	Portal action in the publisher
Viewing a public customer comment	Portal feed items

### Case History

Task	Case Feed Feature Agents Use for this Task
Viewing case history	Feed items for activity on the case

### Case Team

Task	Case Feed Feature Agents Use for this Task
Creating a case team	Case Team related list
Viewing a case team	Case Team related list

### Contact Roles

Task	Case Feed Feature Agents Use for this Task
Creating contact roles	Contact Roles related list

<b>Task</b>	<b>Case Feed Feature Agents Use for this Task</b>
Viewing contact roles	Contact Roles related list
Creating and replying to customer emails	Email action in the publisher

### Content Deliveries

<b>Task</b>	<b>Case Feed Feature Agents Use for this Task</b>
Viewing or previewing content	Content Deliveries related list
Creating and delivering content	Content Deliveries related list

### Emails

<b>Task</b>	<b>Case Feed Feature Agents Use for this Task</b>
Creating customer emails	<ul style="list-style-type: none"> <li>• Email action in the publisher</li> <li>• Emails related list</li> </ul>
Viewing emails	<ul style="list-style-type: none"> <li>• Email feed items</li> <li>• Activity History related list</li> <li>• Emails related list</li> </ul>

### Open Activities

<b>Task</b>	<b>Case Feed Feature Agents Use for this Task</b>
Creating and editing tasks	<ul style="list-style-type: none"> <li>• Create Task action in the publisher</li> <li>• Open Activities related list</li> </ul>
Viewing tasks	<ul style="list-style-type: none"> <li>• Task feed items (for tasks created with Create Task action)</li> <li>• Open Activities related list</li> </ul>
Creating and editing events	<ul style="list-style-type: none"> <li>• Create Event action in the publisher</li> <li>• Open Activities related list</li> </ul>
Viewing events	<ul style="list-style-type: none"> <li>• Task feed items (for events created with Create Event action)</li> <li>• Open Activities related list</li> </ul>

### Related Cases

Task	Case Feed Feature Agents Use for this Task
Creating and editing related cases	<ul style="list-style-type: none"> <li>• Create Child Case action in the publisher</li> <li>• Related Cases related list</li> </ul>
Viewing related cases	<ul style="list-style-type: none"> <li>• Related case feed items (for cases created with Create Child Case action)</li> <li>• Related cases related list</li> </ul>

## Solutions

Task	Case Feed Feature Agents Use for this Task
Viewing suggested solutions	Solutions related list
Finding solutions	Solutions related list

## SEE ALSO:

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

[Printable View in Case Feed](#)

## Printable View in Case Feed

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

Printable view, which you access by clicking  on any Case Feed page, displays information in the following order:

1. Case details
2. Contents of related lists that are included on the Case Detail page
3. Internal notes

## Notes and Tips

- Depending on the related lists that are included on the Case Detail page, certain case events, such as email messages and logged calls, may not appear in the printable view. To ensure that emails and call logs are included, customize your Case Detail page layouts for Case Feed users to add the `Activity History` related list. To include public portal posts, add the `Case Comments` related list.
- Internal notes are listed under the heading **Chatter** on the printable view page.
- Related lists that don't have data in them aren't displayed in the printable view, even if they're included in the Case Detail page layout.
- If your Case Detail page layout includes custom links and buttons, they appear in the case details section in the printable view.

## EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- Printable view shows 500 each of the most recent internal note posts, links, and documents, and 100 of the most recent comments on each of these posts.

## SEE ALSO:

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

## View and Edit Cases from the Case Detail Page in Case Feed

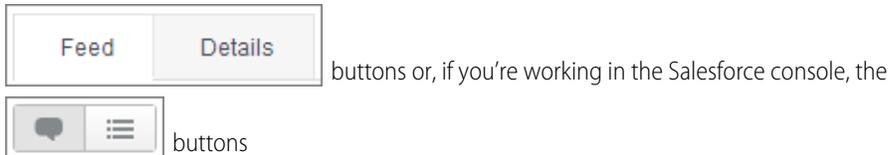
Use the Case Detail page to see and update detailed information about a case and work with related lists.

On the Case Detail page, you can:

- View and edit case information, including changing contact and account information, status, origin, priority, type, and case reason.
- Change or update the case subject and description.
- [View related lists and use them to complete additional tasks](#) (for example, viewing the approval history on a case or adding members to a case team).
- Close a case.
- [Delete a case](#).
- [Clone a case](#).

 **Note:** If your organization has inline editing enabled, you can use it on the Case Detail page.

To switch between the feed view and the case details page when viewing a case, use the



To open a [printable display of the case details](#), click **Printable View** on any page in Case Feed.

## SEE ALSO:

[Case Feed Overview](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view a case:

- "View" on cases

To edit a case:

- "Edit" on cases

To delete a case:

- "Delete" on cases

# Case Hierarchies

## Viewing Case Hierarchies

A case hierarchy shows you cases that are associated with one another via the `Parent Case` field. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve. In the case hierarchy, cases are indented to show that they are related to the parent case above them.

- To view the hierarchy for a case, click **View Hierarchy** next to the `Case Number` field on the case detail page.
- To specify that a case is associated with another case, edit the case and type the case number of the parent in the `Parent Case` field. Alternatively, you can click the lookup icon to search for a case's case number.
  -  **Note:** A parent case must exist before it can be entered and saved in the `Parent Case` field.
- To create a new case that is automatically associated with a case whose detail page you are viewing, click the **New** button on the Related Cases related list. From the **New** drop-down button, you can choose to create either a blank case or a case with information from the parent case.

### SEE ALSO:

[Guidelines for Working with Cases](#)

[Creating Cases](#)

### EDITIONS

Available in both: Salesforce Classic and Lightning Experience

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- "Read" on cases

To view parent cases:

- "Read" on cases

## Related Cases

If set up by your administrator, case detail pages include a Related Cases related list, which displays all of the cases directly below a parent case in a case hierarchy. Cases can be associated with each other via the `Parent Case` lookup field on a case edit page. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking, or a division of one case into multiple cases for various users to resolve.

From the Related Cases related list, click:

- **New** and choose from the drop-down button to [create either a blank case or a case with information from the parent case](#).
- **Edit** to [modify an existing case](#).
- **Cls** to [close an existing case](#).

To perform mass actions from the Related Cases related list, select the checkboxes next to the cases you wish to update, and click:

- **Close** to close the selected cases using the values you specify.
- **Change Owner** to assign the cases to the one user or queue you specify.
- **Change Status** to change the `status` of the cases to the value you specify.

SEE ALSO:

[Viewing Case Hierarchies](#)

### EDITIONS

Available in both: Salesforce Classic and Lightning Experience

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view cases:

- "Read" on cases

To create cases:

- "Create" on cases

# Resolving Customer Inquiries

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## Solving Customer Inquiries

### Solving Cases

To solve a case:

1. [View the case](#).
2. [Find an article](#) or [find a solution](#) that answers the case's question.
3. Attach the article or solution to the case by clicking **Select** next to a reviewed solution in the list of solutions. Or, click the title of an unreviewed solution and choose **Select** on the solution detail page.
4. Email the solution to the contact by clicking **Send Email** in the Activity History related list.
  - a. Click **Select Template** and choose a template.

You or your administrator can create email templates that automatically include the case description, solution detail, solution attachments, and other fields.
  - b. Fill in the email fields.
  - c. Click **Send**.

The emailed solution or article is logged as an activity in the Activity History related list.
5. [Close the case](#).

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To solve cases:

- "Edit" on cases
- AND
- "Read" on solutions

## Using Suggested Articles to Solve Cases

Suggested articles help knowledge base users solve cases quickly. As soon as a new case is saved, the search engine automatically looks for articles that have keywords in common with the case subject. The user working the case can scan the articles and attach them to the case if needed, or initiate another search with different keywords. Articles attached to the case appear on the Articles related list, which also provides a **Find Articles** button to search the knowledge base at any time.

To enable suggested articles:

1. From Setup, enter *Support Settings* in the *Quick Find* box, then select **Support Settings**.
2. Click **Edit** and choose **Enable suggested articles**. Suggested articles and suggested solutions cannot be enabled at the same time.
3. Choose each audience (channel) that should receive suggested articles when submitting a case. Suggested articles are available for the internal app and the portals.
4. When you're done with the Support Settings page click **Save**.

 **Note:** If you don't find a solution in the suggested articles, you can [create an article](#) by clicking **New**.

SEE ALSO:

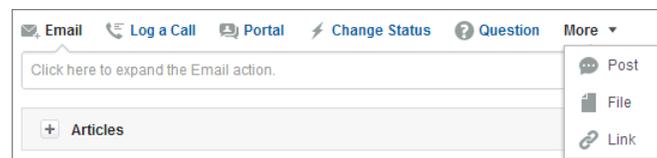
[Salesforce Knowledge Overview](#)

## Use Actions to Work with Cases in Case Feed

Case Feed actions make it easy for support agents to do tasks like send email, post to portals and communities, log calls, change case status, and write case notes, all on the same page.

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

Here are some common Case Feed actions. Depending on how your administrator has set up your organization, you might not see all of these actions.



- Use the Email action to [respond to customers by email](#). In some organizations, the Email and Portal actions are combined in an Answer Customer action.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

To view articles:

- "Read" on the article's article type

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- The Log a Call action lets you create a record of the details of a phone call. Call logs are visible only to other users in your organization, not to customers.
-  **Note:** If you're using a SoftPhone, completed calls and call notes are logged automatically in the case's feed, as are interaction log entries whose `STATUS` is Completed.
- With the Portal action, you can [post replies to a customer portal](#) or a [Chatter Answers community](#).
- Use the Change Status action to escalate, close, or make other changes to the status of a case.
- The Question action lets you search for and create questions.
- The Post, File, and Link actions are the same ones you're used to seeing in Chatter.
  - Use the Post action to create case notes to share information about the case or get help from others in your organization. (Notes created with the Post action aren't included in the Case Comments related list on the case detail page.)
  - Add a PDF, photo, or other document to the case with the File action. (Documents you add with File aren't included in the Attachments related list on the case detail page.)
  - Use the Link action to share a link that's relevant to the case.

SEE ALSO:

[Case Feed Overview](#)

## Find, Attach, and Email Articles with the Case Feed Articles Tool

Knowledge articles can help you solve cases more quickly by providing in-depth troubleshooting steps and other detailed information. Use the articles tool in Case Feed to search for articles relevant to the case you're working with, attach articles to the case, and email them to customers.

-  **Note:** Before you can use the articles tool, your administrator needs to set up and configure Salesforce Knowledge.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

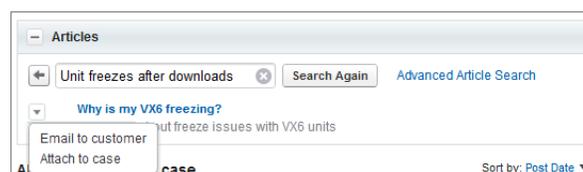
### USER PERMISSIONS

To use articles in Case Feed:

- "Manage Cases"

AND

"Read" on at least one article type



- Click  to open the articles tool.
- By default, the tool shows articles with keywords or phrases similar to the subject and description of the case you're working with. If you don't see the article you want, type new terms in the search box and click **Search Again**, or click **Advanced Article Search** for more options.
- Click the title of an article to open it in a new window if you want to see more information about it than just the title and the summary.
- When you find the article you want, choose what you want to do with it:
  - Select `Email to customer` to attach the article to a message as a PDF.
  - Select `Attach to case` to include the article as a case attachment.

## Close Cases

After you solve a customer's case, you can close it from a few locations and create a solution or article to help solve similar cases.

1. Click **Close Case** on a case's detail page, **Cls** on the Cases related list, or **Save & Close** while editing a case. If enabled by your administrator, you can select `Closed` from `Status` on a case's edit page and click **Save** without completing any more steps.
  2. Update `Status`, `Case Reason`, or any other fields as necessary.
  3. If solutions are enabled, you can fill in the `Solution Details` for the case. If you don't want to save the solution or submit it for review to a solution manager, uncheck `Submit to public solutions`. When this field is checked, the new solution is automatically linked to the case.
  4. If there's a contact on the case, select `Notify contact on case close` to send an email to the contact based on a predefined case close template.
  5. Click **Save** or **Save and Create Article**. The article option is available if both Salesforce Knowledge and article submission during case close is enabled.
-  **Tip:** If you have the "Manage Cases" permission, you can close multiple cases at once using the **Close** button on case lists.

### SEE ALSO:

[Deleting Cases](#)

[Tips on Writing Solutions](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To close cases:

- "Edit" on cases

## Sending Articles from Cases

### USER PERMISSIONS

To set up Email-to-Case or On-Demand Email-to-Case:	"Customize Application"
To enable Email-to-Case or On-Demand Email-to-Case:	"Modify all Data" AND "Customize Application"
To customize page layouts:	"Customize Application"
To create or change HTML email templates:	"Edit HTML Templates"
To create or change public email template folders:	"Manage Public Templates"
To create or change Visualforce email templates:	"Customize Application"

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

If articles are associated with a case, users working on the case can attach PDF versions of the articles to an email simply by choosing a template you create. This capability is available if Email-to-Case or On-Demand-Email-to-Case is set up and the Email related list is visible on case page layouts.

## Creating an Email Template that Converts Articles to PDF Files

To allow users working on a case to automatically attach article PDFs to an email message:

1. From Setup, enter *Email Templates* in the *Quick Find* box, then select **Email Templates**.
2. Click **New Template** to create a template from scratch or click **Edit** next to an existing template. The new or edited template must include the *Articles as PDFs* case field.
3. For example, If you want to edit the *SUPPORT: Case Response with Solution (SAMPLE)* template to include articles instead of solutions, complete these steps:
  - a. Click **Edit** next to the *SUPPORT: Case Response with Solution (SAMPLE)* template.
  - b. Change the *Email Template Name* to *SUPPORT: Case Response with Article (SAMPLE)*.
  - c. Modify the *Template Unique Name* as needed.
  - d. Choose **Case Fields** from the *Select Field Type* drop-down menu.
  - e. Choose **Articles as PDFs** from the *Select Field* drop-down menu.
  - f. Copy the value from the *Copy Merge Field Value* field and paste it in the email body.
4. Click **Save**.

On the case detail page in the Emails related list, users can now click **Send an Email** and choose the new template. Articles associated with the case are automatically converted to PDF attachments, and the attachments can be previewed or deleted if needed before the email is sent.

-  **Note:** Both the article and the knowledge base must be in the same language. For example, if your knowledge base language is English but you want a Japanese article converted into a PDF, change your knowledge base language to Japanese (in Setup, enter *Knowledge* in the *Quick Find* box, select **Knowledge Settings**, then click **Edit**) before converting the article.

## Notes on Field Visibility in Article PDFs

Consider the following information when using email templates that include the **Articles as PDFs** function:

- The fields that appear in article PDFs are determined by your profile if the `Use a profile to create customer-ready article PDFs on cases` checkbox (from Setup, enter *Knowledge Settings* in the *Quick Find* box, then select **Knowledge Settings**) is not selected. If you can see all fields in the original article, all fields also appear in the automatically generated PDF. If field-level security restricts you from seeing a field on an article, that field and its data do not appear in the article's PDF.
- If the `Use a profile to create customer-ready article PDFs on cases` checkbox is selected and a profile is chosen from the **Profile** menu (from Setup, enter *Knowledge Settings* in the *Quick Find* box, then select **Knowledge Settings**), the chosen profile determines which fields appear in automatically generated PDFs. For example, if you are sending article PDFs to customers, you might choose the Customer Portal User profile to ensure that internal-only fields do not appear in article PDFs.
- Fields in the Properties section of an article, including `First Published`, `Last Modified`, `Last Published`, and `Summary`, are not included in any PDF version regardless of setting or profile.

SEE ALSO:

[Salesforce Knowledge Overview](#)

# Responding to Customers

## Emailing Customers

### Working with Case Emails

Cases generated via Email-to-Case or On-Demand Email-to-Case display in an Emails related list. The Emails related list includes all emails sent by your customer regarding a particular case, as well as the email threads between you and your customer. The first 77 characters of an email message appear in the related list so that you can see what the message is about without having to click on it.

To work with Email-to-Case or On-Demand Email-to-Case emails:

- Click **Send An Email** to send an email to a contact, another user, or any other email address.
- Click **Reply** to respond to an email. The email response automatically includes the email body as received from the customer. Enter your response and click **Send**.

When you reply to email messages in the Email related list on cases, the `From:` field on your email may display to recipients as `no-reply@salesforce.com` or `support@company.com`. This is due to how the recipients' email applications receive `Sender` and `From` headers on inbound email. By default, an `Enable Sender ID compliance` setting is selected for your organization, which enables email messages sent from Salesforce to comply with email applications that require `Sender` headers for delivery.

- Click **To All** to respond to all participants on an email thread.

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To view cases:

- "Read" on cases

To work with case emails:

- "Edit" on cases

- Click the subject of the email to view the email. From the email, you can reply to the sender, reply to everyone, forward the email, or delete it.
- While viewing an email, you can display a list of all the emails associated with the case by clicking **Email Message List**, and you can navigate to the case's other emails by clicking **Next** or **Previous**.

 **Note:** The **Email Message List**, **Next**, and **Previous** links are not available in the Customer Portal and partner portal.

- While viewing an email, click **Forward** to forward it. The email automatically includes the email body as received from the customer. Optionally, enter text and click **Send**.
- If the original email was an HTML email, you can click the **Click here to view HTML version** link to see the HTML version. If you want to see the entire email header, click the **Click here to view original email headers** link.
- To view any attachments contained in incoming emails, go to the Attachments related list of the email. To view attachments sent with outbound emails, view the Attachments related list of outbound emails.

The size limit for an attachment is 5 MB. The user who configured the email agent can view its log file to see if any attachments exceeded the size limit.

- Click **Del** to delete an email. Note that a deleted email can be retrieved from the Recycle Bin. However, if you delete an email from a case, then delete the case, you will not be able to retrieve the deleted email from the Recycle Bin.

In the Email related list, emails are listed in the order received according to the most recent. Emails in the related list display one of the following statuses:

Email Status	Description
<b>New</b> 	An inbound email that has not been read. The contents of the <code>Subject</code> field display in bold for emails with a <code>New Status</code> .
<b>Read</b> 	An inbound email that has been read but not replied to.
<b>Sent</b> 	An outbound email.
<b>Replied</b> 	An inbound email that has been replied to. Replying to a sent email gives it a replied status.

When a case contains a new (unread) email, an "Email" task associated with that case is automatically created in the case owner's task list with the email subject displayed. The owner can easily see the new task on the Home tab or from the Open Activities related list of the case. From the task, the owner can click a link to view the email associated with the case. When the user responds to the email, the task is removed from the owner's task list and added to the case's Activity History related list. The user can also move an email task to which they have not responded to the Activity History related list by changing its status to "Completed."

 **Note:** When inbound emails create a new case and your assignment rules route that case to a queue, the "Email" task is assigned to the user configured in the email agent.

If an inbound email does not contain the email address of an existing contact, then the `Web Name` field on the case is automatically updated with the name in the `From` field of the email, and the `Web Email` field on the case is automatically updated with the address provided in the inbound email.

**Tip:** When running the Cases with Emails report, add the `Is Incoming` field to the report to see the cases received via Email-to-Case.

SEE ALSO:

[Sending Articles from Cases](#)

## Send and Reply to Email from Case Feed

Use the features of the Case Feed email action to save time when writing messages and customize the emails you send to customers.

**Note:**

- The email action in Case Feed is available only if your organization uses Email-to-Case.
- Depending on how your administrator has set up Case Feed, some of the options described below might not be available to you or might look different.

Here's how to use the email action:

### EDITIONS

Available in: Salesforce Classic

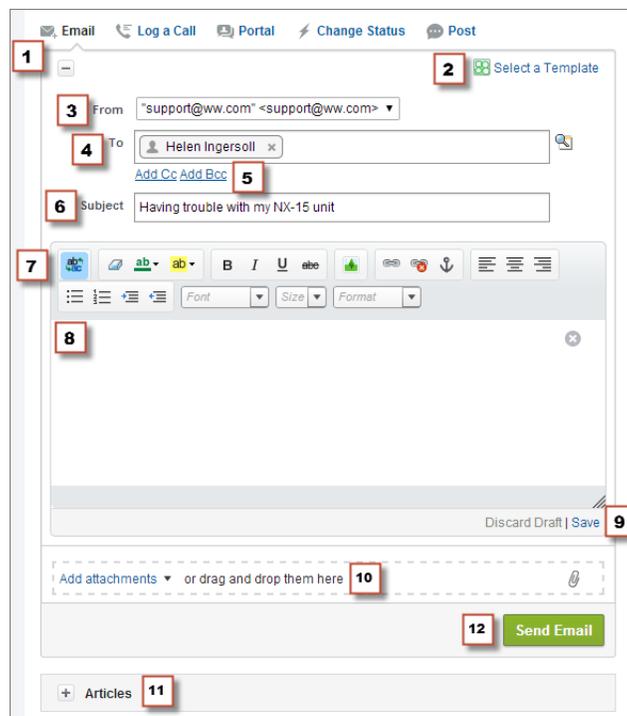
Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To send emails:

- "Send Email"



1. Depending on which action appears, click **Answer Customer** and select `Email`, or just click `Email`. To write a reply to a message, click **Reply** or **Reply All** below an email message in the feed.

2. If your department uses email templates, [choose one for your message](#).
3. Select a **From** address.  
If this field doesn't appear as a picklist, your administrator has already defined a From address.
4. The email address of the contact who created the case automatically appears in the **To** field, as long as the creator is an existing contact. To add more recipients, click  to look up an address, or type or paste email addresses or names in the **To** field.
  - When you enter an email address or name that matches one contact or user, the address appears as a button with the person's name.
  - To add several addresses at once, copy and paste them separated by spaces or commas. These email addresses appear as buttons, and, if they're associated with a contact or user, show the contact's name.
  - When you enter an email address that matches multiple contacts or users, the address appears as a button. Clicking the button brings up a list of people associated with the email address so you can choose the one you want to associate with the message.
5. If you need to copy other people on the message, click **Add Cc** or **Add Bcc**.
6. By default, the email subject is the name of the case it's related to. You can edit the subject if you need to.
7. [Use the rich text editor](#) to add formatting to your message.
8. Create your message. If your department uses Quick Text messages, you can [add them in the body of your email](#).
9. If your administrator has enabled email drafts, you can click **Save** to save a copy of your message without sending it. When you save a message as a draft, any agent with access to the case can edit it.
10. Click **Attach File** or drag and drop files in the attachments pane to add files to the message.
11. Optionally, [attach an article to the message](#).
12. Click **Send Email**.  
Note: Depending on how your administrator has set up Case Feed, this button may have a different name.



**Tip:** Click and drag  in the bottom right corner to change the height of the message pane. Make it larger so you can see more of what you're writing, or make it smaller so you can see more of the case history in the feed without scrolling. Once you resize the message pane, it appears in the new size each time you write an email, until you resize it again.

#### SEE ALSO:

[Post on Cases and Community Questions with the Community Action in the Case Feed](#)

[Case Feed Overview](#)

[Use Quick Text in Case Feed](#)

## Add Images and Files to Email Messages in Case Feed

Give customers comprehensive information to help resolve their issues more quickly by attaching files to email messages, and add inline images to include pictures that enhance your text.

For example, if you're working on a case that requires a customer to try a few different solutions to resolve an issue, you might attach a how-to video or a document with multiple sets of detailed troubleshooting steps. If the customer has to follow a particular set of troubleshooting steps very carefully, you could use inline images after each step in the body of a message.

- To add an inline image, click  in the toolbar of the Case Feed email publisher and upload or link to the image you want. Each image you embed must be no larger than 1 MB, and in .png, .jpg, .jpeg, .jpe, .jfif, .jpeg, .bmp, or .gif format. The total size of your email message, including images and text, can be no more than 12 MB.

 **Note:** You need to use the rich text editor in the email publisher to embed images. You can't embed images in plain text messages.

- To attach files to an email, click **Upload files** to choose a file from your computer or Salesforce, or to use a file that's already attached to the case, or drag and drop files to the attachments area at the bottom of the email publisher. You can attach up to a total of 10 MB to each email message. Salesforce supports all file types.

 **Note:** Drag-and-drop functionality is available only on browsers that support HTML5.

- Click **Files:** to see a list of the attachments you've added.

- Click  next to an attachment to remove it.

When the recipient of your email views the message, any images you've embedded appear in the body of the email. If the total size of everything you've attached to the message is greater than 3 MB, all of the attachments appear as links, which the recipient can use to download the files. If the total attachment size is less than 3 MB, each file appears as an attachment.

 **Example:** For example, let's say you're a support agent for an appliance company, and you're working on a case for a customer who's having trouble with the ice maker on her fridge. You could email the customer step-by-step instructions for troubleshooting the ice maker and include an image after each step, and could attach two documents: a PDF of the user manual for the fridge (a 2 MB file) and a list of maintenance tips to keep the fridge working well (a 10 KB file). When the customer receives the email, she'll see:

- The images embedded in the body of the email message so she can refer to them one at a time as she works through the troubleshooting steps
- The user manual and list of maintenance tips as attachments to the message, as their total size is less than 3 MB

If you also attached a troubleshooting video (a 2.5 MB file), all three of the attachments would appear to the customer as links, as the total size of all attachments would be greater than 3MB.

### SEE ALSO:

[Send and Reply to Email from Case Feed](#)

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

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

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To send emails with attachments or inline images:

- "Send Email"

## Use Email Templates in Case Feed

Templates help you ensure consistency, save time, and include basic information, such as a customer's name and their case number, all with one click. If your administrator has created text, HTML, or Visualforce email templates, or if you've created your own templates, you can use them when emailing customers in Case Feed.

For best results, we recommend using the [rich text editor](#) when working with email templates.

 **Note:** Depending on how your administrator has set up Case Feed, you may see a pre-loaded template when you use the Email action. Use the steps below to choose a different template if needed.

To use a template:

1. Depending on which action appears, click **Answer Customer** and select `Email`, or just click `Email`.
2. Click `Select a Template`.
3. Choose the folder that has the template you want.
4. Click the name of the template to add it to the email.



**Tip:**

- If you choose more than one text or HTML template, each template is added in the order you choose it. If you choose a Visualforce template after choosing another template, it replaces the earlier template.
- If the template you choose has attachments, they're included with the message.
- If the template you choose has merge fields, only the case-related fields are merged.
- To remove a template, click . This also deletes any text you've entered and removes all template attachments.

5. [Finish writing and sending your message.](#)

## Work with Draft Emails in Case Feed

With draft emails, support agents can save messages they write to customers without having to send them immediately, and administrators can create approval processes for email messages.

Drafts are only supported if your administrator has enabled them.

As a support agent, you might want to save a message as a draft while you gather additional information about the issue you're solving, confirm troubleshooting steps with a colleague, or take a break and log out of Salesforce. To save an email as a draft, click **Save** under the text box when you're writing an email.

 **Note:** Drafts aren't auto-saved.

Each case can have only one draft email associated with it, so if you're working on a case with a draft you or someone else has saved, you won't be able to write another email until that draft is sent or discarded. When you view a case with a draft associated with it, you see a notification with the name of the user who wrote the draft and a link to view it. Any agent or supervisor with access to a case can edit the draft email, unless it's awaiting approval.

If your company uses approval processes for email messages, when you submit a message, it's sent to a supervisor for review. (Depending on how your administrator has set up approval processes, you may have the option of submitting the message for review or sending it without review.) When a supervisor approves the message, it's sent to the customer. If your email isn't approved, a message with an

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To send emails

- "Send Email"

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

explanation appears at the top of the publisher when you click **Email** while viewing the case. You can edit the message and resubmit it.

SEE ALSO:

[Review and Approve Email Drafts](#)

## Review and Approve Email Drafts

Depending on how your administrator has set up draft emails and approval processes for your organization, you may need to review and approve messages written by the agents you oversee before those messages are sent to customers.

When an agent submits a message for approval, you receive an email notification with a link to the case that includes the message. A notice appears at the top of the publisher when you click **Email**. Click **View email** to go to the message detail page. On that page:

- Click **Unlock Record** to make the message editable.
- Click **Delete** if you want to discard the draft.
- Click **Approve/Reject** in the Approval History related list to approve or reject the message.
- Click **Reassign** to assign the approval to another supervisor.

If you approve the message, it's sent to the customer. If you reject it, you have the option of writing a note explaining why. This note appears above the publisher on the case page when the agent clicks **Email**, along with a notice that the draft has been rejected.

SEE ALSO:

[Work with Draft Emails in Case Feed](#)

## Customize Emails with the Rich Text Editor in Case Feed

The rich text editor lets you customize the emails you send to customers. Use it to format text, add bulleted or numbered lists, and add images and links.

### Accessing the Editor

The rich text editor appears when you click **Email**, or **Answer Customer** and then **Email**, in the publisher on the Case Feed. You won't see the editor if:

- Your administrator hasn't enabled it.
- You used the plain text editor the last time you wrote an email in Case Feed. Just click the toggle icon  to switch to rich text.

### Tips on Using the Rich Text Editor

- The rich text editor is available only for the Email action.
- If you enter HTML and other kinds of markup in the editor, it won't render when you send a message.
- To delete a message, click  .

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To review and approve email drafts:

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

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To send emails:

- "Send Email"

## Use Quick Text in Case Feed

Quick Text helps you respond to customers and update cases more quickly. Insert pre-written messages, such as greetings and common troubleshooting steps, into customer communications like emails and portal posts. You also can insert pre-written notes into case status changes and call logs. In Case Feed, you can use Quick Text with the Email, Portal, Change Status, and Log a Call actions.

 **Note:** Only Quick Text messages assigned to the channel for the action you're working with are available in that action. For example, only messages assigned to the Email channel are available in the Email action.

1. Choose the Email, Portal, Change Status, or Log a Call action.
2. In the body of the action, type ; ; .  
If you've used Quick Text before, then a list of Quick Text messages appears, with the messages you've used most recently at the top. If this time is the first time you've used Quick Text, then no messages appear.
3. To see more messages, type a word or phrase.  
A list of messages that include those words appears.
4. To see the title and full text of a message, click it once or highlight it using the arrow keys on your keyboard.  
The full message appears at the bottom of the Quick Text list.
5. To select a message, double-click it or highlight it and press ENTER.  
If the message you select contains merge fields, they are resolved when you add the message.

## Phoning Customers

### Salesforce CRM Call Center System Requirements

Salesforce CRM Call Center requires the installation of a light-weight computer-telephony integration (CTI) adapter on every Salesforce user's machine. The **minimum** system requirements for an adapter are:

- For adapters built with CTI version 4.0 or higher:
  - Microsoft® Internet Explorer® 8; Mozilla® Firefox® 3.5; Apple® Safari® 4; Google Chrome™ 10.0 (Internet Explorer 11 isn't supported)
  - Microsoft Windows® XP (with Microsoft .NET framework)
- For adapters built with previous versions of CTI:
  - Internet Explorer 7 or 8; Firefox 3.5 or 3.6 (Safari, Chrome, and Internet Explorer 11 aren't supported)
  - For Windows 7 32-bit, 32-bit Internet Explorer 8; Firefox 3.5 or 3.6
  - For Windows 7 64-bit, 64-bit Internet Explorer 8; Firefox 3.5 or 3.6
  - 256 MB of RAM (512 MB recommended)
  - 20 MB of disk space minimum
  - Intel® Pentium® II processor, 500 MHz or above
  - Windows XP

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To use Quick Text in Case Feed:

- "Read" on Quick Text

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

-  **Note:** If you're using a CTI adapter built with version 4.03 of the CTI Toolkit, a popup window displays when using Firefox or Chrome browsers. This popup window must display on your machine to stay connected to Salesforce CRM Call Center.

## SEE ALSO:

[Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## SoftPhone Overview

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. A SoftPhone's functionality, user interface, and location are determined by the version of the CTI Toolkit with which it was built. See:

- [About CTI 1.0 and 2.0 SoftPhones](#) on page 44
- [About CTI 3.0 and 4.0 SoftPhones](#) on page 46

## SEE ALSO:

[Using the SoftPhone](#)

[Use a SoftPhone with a Salesforce Console](#)

[Checking the Version of Your CTI Adapter](#)

## About CTI 1.0 and 2.0 SoftPhones

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. SoftPhones built with versions 1.0 or 2.0 of the CTI Toolkit display in the sidebar of every Salesforce page. Although administrators and developers can customize CTI 1.0 or 2.0 SoftPhones, they usually include the following components:

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

The screenshot displays the SoftPhone interface during an active call. At the top, a dropdown menu shows the call center state as 'On a Call'. Below this, the phone line header indicates 'Line 1 On Call'. The call information area provides details such as the dialed number (9055551212), duration (04:43), account (Global Media), and contact (Jon Amos). A set of call control buttons includes 'End Call', 'Hold', 'Transfer', 'Conference', and 'New Line'. The 'Current Call Log' section shows a log entry for a call on 2/2/2010 at 9:23 AM, with fields for Subject, Name, Related To, and Comments. Below this, the 'Last Call' section shows a similar log entry for a call on 2/2/2010 at 9:12 AM. At the bottom, there is a link for 'My Calls Today' and the SoftPhone logo.

### Call center state area

Includes a drop-down list that lets you specify whether you're ready to receive calls. See [Changing Your Call Center State](#) on page 55.

### Phone line header

Shows the status of the phone line. A status icon changes colors and blinks (●), and provides a text description. You can click the name of the line (Line 1) to show or hide the line's dial pad and call information area.

### Call information area

Shows data related to the call, such as the phone number the customer used to dial, the duration of the call, and links to any records associated with the call.

### Call button area

Shows buttons that let you make call commands, such as dialing, hanging up, putting a caller on hold, transferring, conferencing, and opening a second line while on a call. See [Using the SoftPhone](#) on page 53.

### Current call log area

Displays log information for the call. By default, the `Subject` field includes the date and time of the call, but users can edit this field. The `Name` field lets users specify a related contact, lead, or person account, while the `Related To` field lets them attach an additional record to the call log once the call ends. Users can enter additional information about the call in the `Comments` text

box. Call logs are saved in an activity record that can be retrieved from the recent calls area of the SoftPhone, or the Activity History related list of the associated records. See [Creating Call Logs in the SoftPhone](#) on page 49.

### Recent calls area

Displays saved logs for calls that have recently completed. Click a log's `Subject` to open its detail page, or click a log's `Name` or `Related To` link to open its associated record. Click **Edit** to reopen a call log for editing in the SoftPhone.

### My Calls Today report

Opens a report of all the calls you've made or received in the last day.

### SoftPhone logo

Displays a customizable logo for each CTI adapter.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

### SEE ALSO:

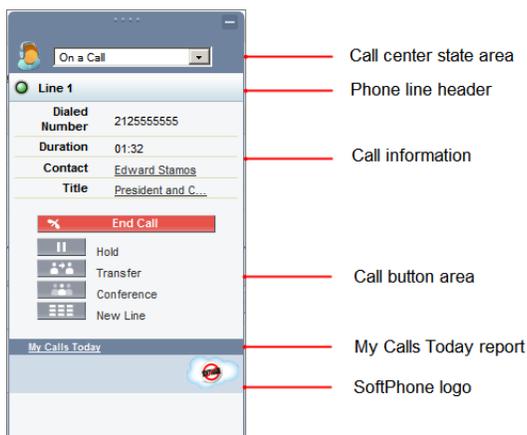
[SoftPhone Overview](#)

[Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## About CTI 3.0 and 4.0 SoftPhones

A SoftPhone is a customizable call-control tool that appears to users assigned to a call center with machines on which CTI adapters have been installed. SoftPhones built with versions 3.0 and 4.0 of the CTI Toolkit display in the footer of the Salesforce console or in the sidebar of every Salesforce page. Although administrators and developers can customize CTI 3.0 and 4.0 SoftPhones, they usually include the following components:



### Call center state area

Includes a drop-down list that lets you specify whether you're ready to receive calls. See [Changing Your Call Center State](#) on page 55.

### Phone line header

Shows the status of the phone line. A status icon changes colors and blinks (●), and provides a text description. You can click the name of the line (Line 1) to show or hide the line's dial pad and call information area.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

**Call information area**

Shows data related to the call, such as the phone number the customer used to dial, the duration of the call, and links to any records associated with the call.

**Call button area**

Shows buttons that let you make call commands, such as dialing, hanging up, putting a caller on hold, transferring, conferencing, and opening a second line while on a call. See [Using the SoftPhone](#) on page 53.

**My Calls Today report**

Opens a report of all the calls you've made or received in the last day.

**SoftPhone logo**

Displays a customizable logo for each CTI adapter.



**Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

**SEE ALSO:**

[SoftPhone Overview](#)

[Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

**Editing Personal SoftPhone Settings**

You can control personal SoftPhone settings within Salesforce. To change your settings, from your personal settings, enter *SoftPhone* in the **Quick Find** box, then select **My SoftPhone Settings**.

The following settings are available:

Setting	Description
Automatically log in to your call center when logging into Salesforce	Select this option if you want Salesforce to use saved login information to automatically <a href="#">log you in to your SoftPhone</a> .
If only one record found on incoming call	Choose one of the following options to specify how a record should be displayed when it is the only one that matches an incoming call: <ul style="list-style-type: none"> <li>• <b>Always open the record automatically.</b> This option displays the record in the main Salesforce window, overwriting whatever was there before. All unsaved changes from your previous record are lost.</li> <li>• <b>Never open the record automatically.</b> This option does not display the matching record. To view it you</li> </ul>

**EDITIONS**

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

**USER PERMISSIONS**

To edit personal SoftPhone settings:

- Member of a call center

**Setting****Description**

must click on the record's link in the SoftPhone.

## SEE ALSO:

[Using the SoftPhone](#)

[Logging In to the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

**Answering a Call Using the SoftPhone**

When logged in to a SoftPhone, you can receive a call when:

- The call originates from a queue and your call center state is set to Ready for Calls
- The call is dialed directly to your extension and you are not already on a call

You can tell that you have an incoming call if you see a flashing red button and the words “Incoming Call,” “Incoming Transfer,” or “Incoming Conference” next to the name of a telephone line in your SoftPhone.

Details about the call, if any, are displayed just above the **Answer** button, and typically include the phone number of the caller and the number that the caller dialed to reach you. When the caller's phone number can be matched with a number in an existing Salesforce record, a link to that record is also displayed. Likewise, if your call center prompts callers to enter an account number or other data before being connected with a representative, your SoftPhone searches for records that contain that information and automatically displays links to matching results.

To answer an incoming call, you can:

- Click **Answer** in the SoftPhone.
- Use your physical telephone set to pick up the call.

When you answer a call, the `Call Duration` clock starts ticking, and your call center state is automatically set to Busy. If you do not answer the call, the system forwards it to another user and your call center state is automatically set to Not Ready for Calls.

Once you have answered a call, you can:

- [Log comments and associate Salesforce records with the call](#)
- [Put the caller on hold](#)
- [Transfer the call to another call center user](#)
- [Conference another call center user into the call](#)
- [End the call](#)

If your SoftPhone supports multiple lines and you answer Line 2 while speaking on Line 1, Line 1 is automatically put on hold.



**Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

**EDITIONS**

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

**USER PERMISSIONS**

To answer calls with a SoftPhone:

- Member of a call center

 **Tip:** *Screen pops* are pages that display when incoming calls match the phone number of an existing Salesforce record. The following table describes when screen pops display (they can only display when your call center state is set to Ready for Calls):

Screen Pops On	Display	Don't Display
Edit pages		
Detail pages		
Detail pages when inline editing is in use		
Edit pages and detail pages in the Salesforce Console		
Outbound calls		

#### SEE ALSO:

[Using the SoftPhone](#)

[Changing Your Call Center State](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## Creating Call Logs in the SoftPhone

Every external call that you make or receive with a SoftPhone automatically generates a call log activity record. You can view these call logs in the Activity History related list of any Salesforce record that is associated with the call or by running a report. Automatically generated call log records include values for:

- The call center user who received or initiated the call
- The phone number of the contact who called or who was called by the call center user
- The date on which the call took place
- The duration of the call, in seconds
- Whether the call was inbound or outbound
- The call center system's unique identifier for the call

You can associate up to two records, edit the subject, and add comments to a call log while the call is underway. To do so:

1. Associate up to two the records with the call log:
  - When you view or create a contact, lead, or person account, a **Name** drop-down list appears in the call log. Use this list to select a single contact, lead, or person account record to associate with the call.
  - When you view or create any other type of Salesforce record, a **Related to** drop-down list appears in the call log. Use this list to select a single record of any other type to associate with the call.

 **Note:** Custom object records can only be associated with a call log if the custom object tracks activities.

By default, the most recently viewed records are selected in the **Name** and **Related to** lists unless you manually choose a different record. The records that you choose in these lists will include the call log in their Activity History related lists once the call ends. These records are also displayed with the call if it is transferred to or conferenced with another Salesforce CRM Call Center user.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To create a call log:

- Member of a call center

2. Edit the `Subject` and `Comments` fields with information about what happened during the call.

After the call ends, the call log is automatically saved as a completed task. You can quickly access the saved call logs for calls that were just completed by expanding the `Last N Calls` section of the SoftPhone. Up to three of your last calls are displayed in this list with your most recent call displayed first:

- To modify a recent call log, click **Edit** next to the call log's `Subject` field.
- To view a saved call log, click the call log's `Subject`.
- To view a record that is associated with a call log, click the name of the record.

To view a list of all calls that you've made or received in the past day, click **My Calls Today**. This link opens the My Calls Today report in the Reports tab.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

SEE ALSO:

[Using the SoftPhone](#)

[Wrapping Up a Call Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## Putting a Caller on Hold Using the SoftPhone

Salesforce CRM Call Center allows you to put any caller on hold so that the caller can't hear you speaking. To put a caller on hold, click **Hold** in the SoftPhone line that is currently active. The `Hold Time` clock that shows how long the caller has been waiting automatically starts, and the line light icon () begins to blink yellow.

- Callers are automatically put on hold whenever you initiate a [call transfer](#), dial a number on a second line, or initiate a [conference call](#).
- If you click **Hold** while on a conference, your line becomes mute but other conference participants can still speak to one another.

To resume the call, click **Retrieve from Hold**. If you want to end the call without retrieving the caller from hold, click **End Call**.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

SEE ALSO:

[Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To put a caller on hold:

- Member of a call center

## Transferring a Call Using the SoftPhone

To transfer a call to another call center user or to an external phone number:

1. [Attach any relevant Salesforce records](#) to the call that you want to transfer. For example, if you created a case for the call, save it, and make sure that it is selected in one of the `Related To` fields of the current call log. By doing this, the user to whom you are transferring the call will have access to the case in his or her SoftPhone.
2. Click **Transfer** in the SoftPhone line that you want to transfer. You remain on the line with your first caller and a new dial pad becomes active.
3. Use the dial pad, your keyboard, or the [call center directory](#) to enter the phone number of the person to whom the call should be transferred.
4. Click **Initiate Transfer**. Your first caller is automatically put on hold while you are on the call with the destination number. If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.
5. When you are ready to transfer your first caller to the destination number, click **Complete Transfer**. If you no longer want to transfer the call, click **Cancel Transfer**.

Once you complete a transfer, your line is immediately freed and you return to the Ready for Calls state.

SEE ALSO:

[Using the SoftPhone](#)

[Wrapping Up a Call Using the SoftPhone](#)

[Creating Call Logs in the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## Making a Conference Call Using the SoftPhone

To initiate a conference call with another call center user or an outside phone number:

1. While on a call, click **Conference** in the SoftPhone line that is currently active. Your caller is automatically put on hold and a new dial pad becomes active.
2. Use the dial pad, your keyboard, or the [phone directory](#) to enter the phone number of the person who you want to include in the conference.
3. Click **Initiate Conference**. Your first caller remains on hold while you are on the call with the destination number. If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.
4. Once you have connected with the second caller and are ready to start the conference, click **Complete Conference**. The second caller joins the first on your original telephone line and all three of you can speak freely to one another. If you no longer want to conference the call after dialing the second number, click **Cancel Conference** to hang up on the second caller and return to your original caller.



### Note:

- If you click **Hold** while on a conference, your line becomes mute but other conference participants can still speak to one another.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To transfer a call:

- Member of a call center

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To initiate a conference call:

- Member of a call center

- Some phone systems limit the number of callers who can be conferenced on a single line. See your administrator for details.

## SEE ALSO:

[Using the SoftPhone](#)

[Putting a Caller on Hold Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## Wrapping Up a Call Using the SoftPhone

When you are ready to end a call:

1. [Update the associated call log](#). For example, if you created a case or viewed a contact while you were on the call, verify that they are selected in one of the `Related To` fields of the log, and use the `Comments` text box to enter any notes about the call.  
Call logs are not created for internal calls.
2. Click **End Call** in the active SoftPhone line or use your physical phone set to hang up. This terminates the call and frees the line.
3. If wrap up codes are not enabled, your call center state is set back to Ready for Calls and the log for your call is automatically saved.
4. If wrap up codes are enabled, your [call center state](#) is set to Wrap Up and a set of reason codes are displayed in the SoftPhone. While in this state you cannot receive any incoming calls.
  - a. Select the reason code that best represents the outcome of the call.
  - b. Optionally make any additional modifications to your call log.
  - c. Click **Done**. Your call center state returns to Ready for Calls, and the log for your call is automatically saved.

All saved call logs are placed in the Last N Calls section of the SoftPhone for quick reference. You can review details of these call logs by clicking any of the associated links:

- The `Subject` link (for example, "Call 6/01/2006 12:34 PM") opens the call log details page.
- Either of the `Related To` links opens the detail page for the specified record.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

## SEE ALSO:

[Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To end a call:

- Member of a call center

## Using the SoftPhone

The Salesforce CRM Call Center SoftPhone appears in the left sidebar of your Salesforce window or in the footer of the Salesforce console. You can use the SoftPhone to:

- [Log in to your call center](#)
- [Modify your call center state](#) to show whether you are ready to receive a new call
- [Dial a phone number](#) by using the built-in SoftPhone, or by clicking the  icon next to any phone number associated with a contact, lead, activity, or account
- [Look up a phone number](#) in your custom call-center directory
- [Answer a phone call](#) from another call center user or an external number
- [Put a caller on hold](#)
- [Initiate a conference call](#) with another call center user or an external number
- [Transfer a phone call](#) to another call center user or an external number
- [Add comments to or associate Salesforce records with an automatic call log](#) to quickly record information related to a call
- [Edit personal Salesforce CRM Call Center settings](#) to customize the behavior of your SoftPhone

You can't collapse the sidebar if you're a Salesforce CRM Call Center user and working within the [Console tab](#).

-  **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

### SEE ALSO:

- [Salesforce CRM Call Center System Requirements](#)
- [Use a SoftPhone with a Salesforce Console](#)
- [Wrapping Up a Call Using the SoftPhone](#)
- [Tip sheet: Getting Started with your SoftPhone](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view and use the SoftPhone:

- Member of a call center

## Logging In to the SoftPhone

Salesforce CRM Call Center requires you to first log in to Salesforce and then to log in separately to your organization's phone system. The phone system login is located in the sidebar and only appears if you are:

- Assigned to a call center in Salesforce
- Using a machine on which an appropriate CTI adapter is installed. (You can quickly verify that an adapter is installed by looking for the  icon in the system tray of your computer. The system tray is located next to the clock in the lower-right corner of your monitor.)

If a phone system login does not appear, contact your administrator.

Depending on the phone system that your organization uses, the login prompts you to enter your user ID, password, and other credentials. Once you have entered these values, click **Log In** to complete the connection to your phone system.

To automatically log in to your phone system without having to click the **Log In** button:

1. From your personal settings, enter *SoftPhone* in the **Quick Find** box, then select **My SoftPhone Settings**.
2. Select **Automatically log in to your call center when logging into Salesforce**. Once you have logged in to your phone system, Salesforce remembers your login information and automatically makes a connection to your phone system whenever you log in to Salesforce.

 **Note:** If you explicitly log out of the phone system at any time while you are logged in to Salesforce, automatic log in is turned off for the remainder of your Salesforce session. To reenable automatic log in, log out of Salesforce and then log back in.

After logging in to a phone system, your call center state is automatically set to Not Ready for Calls. If you want to receive calls, you must [change your call center state](#) to Ready for Calls.

 **Tip:** If you're using a CTI adapter built with version 4.0 of the CTI Toolkit, you'll be automatically logged out of the SoftPhone after 8 hours if you have one browser tab open and go to an external Web page, or to a Salesforce page without a sidebar (such as a dashboard). Automatic-logout times can vary because they're based on how your administrator has configured your SoftPhone. To stay logged in, make sure you have at least one browser tab open to a Salesforce page with a sidebar, such as Home or Cases. Automatic logout doesn't occur in the Salesforce console.

### SEE ALSO:

[Using the SoftPhone](#)

[Checking the Version of Your CTI Adapter](#)

[Salesforce CRM Call Center System Requirements](#)

[Tip sheet: Getting Started with your SoftPhone](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To log in to Salesforce CRM Call Center:

- Member of a call center

## Changing Your Call Center State

While logged in to Salesforce CRM Call Center, there may be times when you do not want to receive calls on your SoftPhone, or when you need to step away from your desk. To avoid receiving calls

when you do not want them, you can set your call center state next to the  icon in the SoftPhone. Possible values for call center state include:

Call Center State	Description
Ready for Calls	You are not currently on a call, and you are prepared to receive the next direct or queued call.
Not Ready for Calls	You are not currently on a call, and you are not prepared to receive the next queued call. In this state you can still receive calls that are dialed directly to your extension.
On a Call	You are currently connected to a caller and cannot receive either a direct or a queued call.
Wrap-Up	You are currently on a call, and you wish to go directly to the Not Ready for Calls state when the call is complete.
Log Out	You want to log out from your call center phone system and remain logged in to Salesforce. After you select this option, Salesforce CRM Call Center automatically closes the connection to your call center and displays the <a href="#">SoftPhone login screen</a> .

When you first log in to Salesforce CRM Call Center, your call center state is automatically set to Not Ready for Calls. You must choose Ready for Calls from the drop-down list before you can receive any calls.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

### SEE ALSO:

[Using the SoftPhone](#)

[Logging In to the SoftPhone](#)

[Making a Call Using the SoftPhone](#)

[Wrapping Up a Call Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To change your call center state:

- Member of a call center

## Using the Call Center Directory

Every call center has an associated call center directory that includes the name and number of every user that belongs to that call center, as well as other phone numbers that are related to records in your system.

To use your call center directory:

1. In the SoftPhone, click the name of the open line that you want to use. This action opens the dial pad for that line. Click  next to the dial pad to open your call center directory.
2. Search the call center directory for a phone number:
  - a. In the **Pick an object** drop-down, choose the type of record that you want to search. Any object with a phone number field is included in this list.
  - b. In the **Search** text box, type all or part of the name for which you are searching.
  - c. Click **Go** to view a list of only those records that include your search text.
3. When you find the phone number that you want, click its associated record name to automatically enter the number into the SoftPhone.
4. Click **Dial** to make the call.

SEE ALSO:

[Using the SoftPhone](#)

[Making a Call Using the SoftPhone](#)

[Making a Conference Call Using the SoftPhone](#)

[Transferring a Call Using the SoftPhone](#)

[Tip sheet: Getting Started with your SoftPhone](#)

## Making a Call Using the SoftPhone

In Salesforce CRM Call Center there are three ways to make a call:

- [Dialing a number manually](#)
- [Using the call center directory](#)
- [Using click-to-dial](#)

While on a call, you can also make a call on a second phone line by clicking **New Line**. The new line allows you to enter a new phone number while remaining connected to your original caller. Once you click **Dial**, your original call is placed on hold, and your new call begins.

If you make a call while your [call center state](#) is set to Ready for Calls, your state moves directly to Not Ready, and you must enter Not Ready reason codes.

To end a call that you just dialed, click **End Call**. Some phone systems don't allow you to end a call from a SoftPhone before it is answered. In these cases, an **End Call** button isn't displayed, and you must use your physical phone set to terminate the call.

If a number you dial is busy, a message appears and you have the option to dial again or cancel the call.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To use a call center directory:

- Member of a call center

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To make a call:

- Member of a call center

your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

#### SEE ALSO:

- [Using the SoftPhone](#)
- [Putting a Caller on Hold Using the SoftPhone](#)
- [Making a Conference Call Using the SoftPhone](#)
- [Transferring a Call Using the SoftPhone](#)
- [Wrapping Up a Call Using the SoftPhone](#)
- [Tip sheet: Getting Started with your SoftPhone](#)

#### Making a Call by Dialing a Number Manually

To make a call in Salesforce CRM Call Center by manually dialing a number:

1. In the SoftPhone, click the name of the open line that you want to use. This action opens the dial pad for that line.
2. Enter the phone number that you want to dial by clicking the number buttons on the dial pad, or by typing numbers on your keyboard.
3. Click **Dial** or press the Enter key on your keyboard.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

#### SEE ALSO:

- [Using the SoftPhone](#)
- [Making a Call Using the Call Center Directory](#)
- [Making a Call Using Click-to-Dial](#)
- [Tip sheet: Getting Started with your SoftPhone](#)

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To make a call:

- Member of a call center

### Making a Call Using the Call Center Directory

To make a call in Salesforce CRM Call Center using the call center directory:

1. In the SoftPhone, click the name of the open line that you want to use. This action opens the dial pad for that line.
2. Click  next to the dial pad to open your call center directory.
3. Use the [directory](#) to locate the number that you want to dial.
4. When you have found the number, click the name associated with the number to automatically enter the number into the dial pad.
5. Click **Dial** or press the Enter key on your keyboard.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

#### SEE ALSO:

[Using the SoftPhone](#)

[Making a Call by Dialing a Number Manually](#)

[Making a Call Using Click-to-Dial](#)

[Tip sheet: Getting Started with your SoftPhone](#)

### Making a Call Using Click-to-Dial

To make a call directly from the phone field of a contact, lead, activity, or account using Salesforce CRM Call Center:

1. Locate the number that you want to dial in a contact, lead, activity, or account.
2. Click the  button to the right of the number. The number is automatically dialed in the first open SoftPhone line.
  - A number that has already been clicked cannot be clicked again for five seconds.
  - The  button does not appear next to fax numbers.

 **Note:** Some Salesforce CRM Call Center features that are described in this help system might not be available with your SoftPhone because of customizations that have been made for your organization or the CTI Toolkit with which your SoftPhone was built. See your administrator for details.

#### SEE ALSO:

[Using the SoftPhone](#)

[Making a Call by Dialing a Number Manually](#)

[Making a Call Using the Call Center Directory](#)

[Tip sheet: Getting Started with your SoftPhone](#)

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To make a call:

- Member of a call center

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To make a call:

- Member of a call center

## Checking the Version of Your CTI Adapter

To check which version of the CTI adapter you've installed on your machine:

1. Run the CTI adapter from where it's installed. For example, from the Start menu, select **All Programs > salesforce.com > CTI Adapter 2.0 > Salesforce Adapter 2.0**.
2. Right-click the  icon in the system tray of your computer. The system tray is located next to the clock in the lower-right corner of your screen.
3. Click **About...**

The version of your CTI adapter displays under `CTI Connector`.

 **Note:** If you're using a CTI adapter built with version 4.03 of the CTI Toolkit, a popup window displays when using Firefox or Chrome browsers. This popup window must display on your machine to stay connected to Salesforce CRM Call Center.

SEE ALSO:

[Salesforce CRM Call Center System Requirements](#)

[Logging In to the SoftPhone](#)

## Replying to Portals and Web Communities

### Viewing Community Activity for Ideas and Questions

Activity statistics, such as how many posts you've made and how many likes you've received in Ideas and Questions appear on your profile page so that others can learn about your participation in the community.

Click your name anywhere around the application to view your profile. If available, you can also click the Profile tab or *Your Name* > **My Profile** at the top of the page. View other people's profiles by clicking their name.

Community Activity appears on the Overview tab of your profile and shows how your activity stacks up to other people's. You can also evaluate the activity of other members of the community when you look at their profile.

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### EDITIONS

Available in: Salesforce Classic

Ideas available in:

**Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Chatter Answers available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Chatter > People > An Lin

Feed Overview

**About Me**

EDUCATION: University of California, Berkeley  
 EXPERIENCE: 5 years in current position  
 SKILLS: Management, Agile Development  
 MISSION: To bring World Wide Computing to the top of the pile  
 PERSONAL: Married with two young sons

**Contact**

**APAC Sales Director**  
 admin@wwcomputing.com  
 1 Market St  
 San Francisco, CA 94105  
 US  
 Allison Wheeler (Manager)

**Files Owned**  
 No files have been added yet.

**Groups**  
 Join or create groups

**Community Activity**

**Questions**

Questions Asked	1
Questions Answered	4
Solved Questions	0

**Ideas**

Ideas Created	2
Idea Comments Received	1
Ideas Voted On	0

**Contribution**

Active Influencer

3 posts & comments	2 comments received	0 likes received
--------------------	---------------------	------------------

When Chatter Answers is enabled for your organization, the total numbers for the following activities appear on your profile page:

- Questions you've asked
- Questions you've answered
- Questions you've solved with a best answer

Click **Questions** to navigate back to the Q&A tab.

When Reputation in Ideas is enabled by your administrator, the total numbers for the following activities appear on your profile page:

- Ideas you've created
- Comments you've received
- Comments and ideas you've voted on

Click **Ideas** to navigate back to the Ideas tab.

## Working with Customer Portal Users

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal. If you don't have a Customer Portal, but want to easily share information with your customers, try Communities.

Existing organizations using Customer Portals may continue to use their Customer Portals or transition to Communities. Contact your Salesforce Account Executive for more information.

 **Note:** High-volume portal users are available for customer portals or communities intended for many thousands to millions of users. See About High-Volume Portal Users.

Some common tasks when managing Customer Portal users include:

- Setting up the Customer Portal for users
- Enabling Customer Portal users individually from the Contacts tab
- Disabling and deactivating Customer Portal users
- Changing Customer Portal users' information and roles
- Changing Customer Portal users' accounts
- Merging Customer Portal users
- Resetting Customer Portal users' passwords
- Viewing Customer Portal users' user licenses
- Granting high-volume portal users access to object's records
- Sharing high-volume portal users' records with Salesforce users
- Managing Customer Portal users' permissions and access settings
- Assigning profiles to a Customer Portal
- Delegating Customer Portal user management and case and contact management to portal users
- Reporting on Customer Portal users

 **Tip:** To troubleshoot issues for Customer Portal users, click **Manage External User** and choose **Log in to Portal as User** on the portal user's contact detail page. This selection opens a new browser window and automatically logs you into the portal as the portal user. This option also ensures that the portal is configured appropriately.

The **Log in to Portal as User** button is only available if you have the "Edit Self-Service Users" permission and "Edit" access on the account. The **Log in to Portal as User** button does not display for inactive portal users.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

## Post on Cases and Community Questions with the Community Action in the Case Feed

The Community action in the case feed is your default option for responding to customers on cases that originated from a community or customer portal.

To post on cases in a customer portal or community:

1. Click **Answer Customer** on the Case Feed page.
2. Click  and select **Community**.  
Depending on how your administrator has set up Case Feed, you may be able to click **Community** without first having to click **Answer Customer**.
3. Enter the message to the customer.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To create case posts in customer portals or communities:

- "Edit" on cases

Post | Email | Log a Call | Community | Change Status | More

Hi Pete,  
We're sending you a new climbing harness system to replace the defective one. Please let us know if you have any questions or feedback on the new system!

Your message will be posted to the customer case. **Post**

4. If you're working on a case that was escalated from a question in Chatter Questions or Chatter Answers, choose who you want your post to be visible to:
  - Select **Customer Only** to post your answer as a private reply, or **Everyone** to post it as a public reply.
  - Select **Customer Case** to make a post visible to all internal and external users with access to the case, or **Community Question** to post a public answer on the community user's question. If you select **Customer Case** and your Salesforce administrator has enabled the community case feed, you'll be creating a Chatter post instead of a case comment.

Post | Email | Log a Call | Community | Change Status | More

Pete, thanks for your question! The TX20 climbing harness system supports up to 300 pounds.

Customer Case  Community Question **Answer**

5. Optionally, select **Send Email** to send a message to the customer letting them know that a reply to their question has been posted to the case.

 **Note:** This option is only available if your administrator has enabled it, and if the customer you're replying to is associated with the case and has a valid email address. If your organization uses the community case feed and email notifications for

Chatter case posts are enabled, users are automatically notified by email about public posts on their cases and this option doesn't appear.

6. Optionally, attach a Knowledge article to the post.
7. Click the button to publish your post.

 **Note:** If the community case feed is enabled in your organization, you can change the visibility of case posts after they are published. For details, see [Expose or Hide a Published Post or Email in the Community Case Feed](#).

SEE ALSO:

[Send and Reply to Email from Case Feed](#)  
[Case Feed Overview](#)

## Answers Overview

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

## Answers Terminology

The following terms are used when describing answers features and functionality:

### Answers

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

### Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

### Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

### Data Category for Answers

On the Answers tab, *data categories* allow users to classify questions in an answers zone. For example, if you have a zone for hardware products, your data categories may include laptops, desktops, and printers. Zone members can quickly browse within a specific category to find answers to their questions. Administrators can use data categories to control access to questions.

### Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is "Ideas for car features," an appropriate idea for that zone might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular zone is "Ideas for our company's employee benefits," an appropriate idea for that zone might have the title "On-site day care."

## EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

## USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

**Question**

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

**Reply**

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

**Vote, Reply**

In an answers community, a vote means you either like or dislike a reply to a question.

**Zone**

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.

**Icon Descriptions**

Icon	Description
	A question that has been resolved. To resolve a question, the person who asked the question <a href="#">chooses a reply as the best answer</a> .
	A question that community members have replied to. For example, this icon represents a question with four replies. If a question has no replies, a "0" appears in this icon.
	A reply to a question.
	A reply that has been marked as the best answer to a question.

**Using Answers**

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

On the Answers tab you can:

- [Ask a question](#)
- [Find an answer to a question](#)
- [Reply to a question](#)
- [Vote for a reply](#)
- [Identify a reply as the best answer to your question](#)
- [View all of your questions and replies](#)
- [Convert a reply into an article in the knowledge base](#)

**EDITIONS**

Available in: **Salesforce Classic**

Answers is available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

**USER PERMISSIONS**

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

- [Escalate a question to a case](#)

The right side of the answers home page provides a snapshot of recent activity by showing the most recently asked and the most recently replied questions, as well as questions that have been open for more than a week.

Only administrators have full read, create, edit, and delete permissions for answers. Standard and portal users can delete their own questions and replies if no one has replied or voted.

SEE ALSO:

[Answers Overview](#)

## Asking a Question

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

To ask a question:

1. From the Answers tab, enter your question and click **Ask**.  
Salesforce searches the titles and descriptions of the other questions in the zone and lists ones that are similar to yours. If your question has already been asked, click the question title to view the replies that other zone members have posted to that question.  
Alternatively, click **Start Over** to clear the similar questions results and ask another question.
2. If your question has not already been asked, click **Continue**.
3. Enter a description of your question. Use the [HTML editor](#) to format your text or upload an image.
4. Select a category for your question. If you do not assign a category, community members may have difficulty finding your question, as they must use search or [view all questions in the community](#).
5. Click **Post Question**.

After asking your question, wait for community members to post replies. Then you can [choose a reply as the best answer](#) to resolve your question.

SEE ALSO:

[Answers Overview](#)

[Using Answers](#)

[Replying to a Question](#)

[Escalating a Question to a Case](#)

### EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

## Creating Questions from the Questions Tab

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

 **Note:** Since your administrator determines the fields on questions, some fields might not be included in the following steps.

You can use the Questions tab in both the application and the console to ask questions of the zones that you moderate and manage. Asking community members for input or opinions is an easy way to assess interest in topics or create engagement in the community.

To post a question to the community from the Questions tab:

1. Click **New Question** from the Questions list view page or click **New** from the Recent Questions list on the Questions overview page.
2. Select a zone for your question.
3. Add a title for your question.
4. Optionally, enter a description of your question.

Use the rich text editor to format your text or upload an image. To ensure that your images appear correctly in the feed, Salesforce recommends that they be less than 450 pixels wide.

5. Select a category for your question.

Questions must be assigned to a category to appear in the community. Questions that don't have a category are still visible to the owner of the question, but not to other members of the community.

6. Click **Save**.

## Editing and Deleting a Question

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

Standard users can delete their own questions if the questions have not received replies. Once a question receives a reply, the owner of the question can no longer delete it. As the Salesforce administrator, you can edit or delete any question posted to a community. For example, you may want to monitor your answers community and edit or delete questions that contain inappropriate content or offensive language.

To edit or delete a question:

1. Click the question title to view the question detail page.
2. Click **Edit** or **Delete** at the top of the page. When editing a question, you can change the title or description and select a different category for the question. When deleting a question, the question (and all associated replies) goes to the Recycle Bin.

### EDITIONS

Available in: **Salesforce Classic**

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Questions tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

### EDITIONS

Available in: **Salesforce Classic**

Answers is available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To edit any question:

- "Edit" on questions

To delete any question:

- "Delete" on questions

Another way to prevent offensive language is to create a validation rule that prevents users from entering specific words when asking a question.

To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.

## Finding and Viewing Questions

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

There are a couple ways to find a question:

- [Browse all questions within a community or category.](#)
- Search for a question using the search field on the Answers tab. This field searches the title and description fields for both questions and replies and displays matching results.

Once you've found your question, click the question title to view the question detail page, which lists all the replies for the question. The question detail page lists the number of community members who liked and disliked each reply, and also shows the best answer to the question (if one has been chosen).

From the question detail page, you can:

- [Reply to the question.](#)
- [Vote for a reply.](#)
- [Choose a reply as the best answer.](#) You can only choose a best answer if you asked the question or are a Salesforce administrator.

If a question has already been resolved, you can click **Mark as Not Answered** above the question to re-open it.

- Sort replies by
  - Newest—Shows the most recently posted replies at the top of the list.
  - Oldest—Shows the oldest replies at the top of the list.
  - Most Votes—Shows the replies with the greatest number of “likes” and “dislikes” (added together) at the top of the list.

SEE ALSO:

[Answers Overview](#)

[Using Answers](#)

### EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To view the Answers tab:

- “Read” on questions

To ask and reply to questions:

- “Create” on questions

To vote for replies:

- “Read” on questions

## Browsing Questions within a Zone or Category

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

To view all questions within a zone or category, go to the Answers tab and click the zone name or category that appears below the *Get an Answer* heading.

### Browsing Questions within a Zone

After clicking the zone name to view all questions within that zone, you can:

- [Ask a question](#).
- Filter questions so you only see the open or resolved questions. A question is considered resolved when the person who asked the question selects one of the replies as the best answer. Community members can continue to post replies and vote for replies even when the question has been resolved.
- Sort questions by:
  - Recent Activity—Shows the questions that have the most recent replies at the top of the list
  - Newest—Shows the questions that have been most recently asked at the top of the list
  - Oldest—Shows the oldest questions at the top of the list
- Click **Reply** below a question to [post a reply](#).
- Click a category to view all the questions associated with that category.

All the categories within your zone appear under the zone name at the top of the page.

The [question icons](#) identify whether the question has been resolved or is still open.

### Browsing Questions within a Category

When community members ask a question, they associate a single category with their question to make it easier to find within the community. To browse all questions associated with a category, click the category name to display the category detail page.

You can click on a category from the following locations:

- When [viewing a question](#), the categories associated with that question appear below the question description.
- When browsing questions within a zone, all the categories in the zone appear below the zone name.
- On the [answers home page](#), all the categories in the zone appear below the zone name.

From the category detail page, you can:

- [Ask a question](#) that is automatically associated with the category you are viewing.
- View all questions associated with that category, or filter the questions so you only see the open or resolved questions. A question is considered resolved when the person who asked the question selects one of the replies as the best answer. Community members can continue to post replies and vote for replies even when the question has been resolved.
- Sort questions by:

### EDITIONS

Available in: **Salesforce Classic**

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

- Recent Activity—Shows the questions that have the most recent replies at the top of the list
- Newest—Shows the questions that have been most recently asked at the top of the list
- Oldest—Shows the oldest questions at the top of the list
- Click **Reply** below a question to [post a reply](#).

The [question icons](#) identify whether the question has been resolved or is still open.

SEE ALSO:

[Answers Overview](#)

## Replying to a Question

-  **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

To reply to a question:

- If you're viewing a list of [questions within a community or category](#), click **Reply** next to question you want to respond to. Enter your reply in the editor and click **Reply**.
- If you're [viewing the details of a question](#), enter your reply in the space provided at the bottom of the page, and click **Reply**.

After you reply to a question:

- Community members can vote on whether they like dislike your reply.
- The person who asked the question can choose your reply as the best answer.

SEE ALSO:

[Answers Overview](#)

[Voting for a Reply](#)

[Choosing the Best Answer to a Question](#)

[Escalating a Question to a Case](#)

### EDITIONS

Available in: Salesforce Classic

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

## Editing and Deleting a Reply

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

Standard users without the "edit" and "delete" permissions on the answers object cannot edit or delete their replies. However, as the Salesforce administrator, you can edit or delete any reply posted to a community. For example, you may want to monitor your answers community and edit or delete replies that contain inappropriate content or offensive language.

To edit or delete a reply:

1. Click the question title to view a list of all replies for the question.
2. Click **Edit** or **Delete** next to the reply you want to change or remove. When deleting a reply, the reply goes to the Recycle Bin.

Another way to prevent offensive language is to create a validation rule that prevents users from entering specific words when posting a reply.

To create validation rules, from the object management settings for Chatter Answers question and Chatter Answers reply, go to Validation Rules.

## Voting for a Reply

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

When you vote on a reply, you contribute to the answers community by identifying the replies that contains the most helpful (and unhelpful) information. When other community members look for an answer to a question, they can quickly look at the number of "likes" and "dislikes" a reply has received and make a more informed decision about which reply to read.

In addition, the more votes a reply receives the easier it is for the person who asked the question to [choose a reply as the best answer](#).

When [viewing a question](#), review the replies and click **Like** to voice your approval of a reply or **Dislike** if a reply contains incorrect or unhelpful information. Your vote (either a +1 or -1) is included in the Like or Dislike total for that reply. You can't vote for your own reply and you can only vote once for each reply.

SEE ALSO:

[Answers Overview](#)

[Using Answers](#)

[Replying to a Question](#)

### EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To edit replies:

- "Edit" on questions

To delete replies:

- "Delete" on questions

### EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

## Choosing the Best Answer to a Question

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

After you ask a question, you should monitor the replies posted by other community members and eventually choose one of the replies as the best answer. The best answer is highlighted directly below the question so it's easy to find, which helps community members quickly identify the most useful resolution to the question.

Only Salesforce administrators and the person who asked the question can mark a reply as the best answer.

To choose the best answer:

1. From the Answers tab, find your question and click its title.
2. Decide which reply is the best answer, and click **Choose as Best Answer**.

To identify the best answer, look at the votes ("likes" and "dislikes") for each reply. The reply with the most "likes" probably contains the most useful information. If a question has many replies, try sorting the replies by **Most Votes** so the replies with the most likes and dislikes appear at the top of the list.

After you choose a best answer:

- The question is marked as "resolved". Community members can continue to post and vote on replies for resolved questions.
- If another reply that you like better is posted in the future, simply choose that reply as the best answer to replace the old best answer.
- You can remove the best answer status of the reply at any time. Removing the best answer status from a reply makes it a regular reply.

SEE ALSO:

[Creating an Article from a Reply](#)

[Replying to a Question](#)

[Voting for a Reply](#)

### EDITIONS

Available in: **Salesforce Classic**

Answers is available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

## Viewing Your Questions and Replies

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

Once you become an active community member, you can view a list of all the questions you asked and replies you posted by clicking **My Questions & Replies** at the top of any page in the Answers tab.

When viewing a list of your questions, you can quickly identify which questions you resolved and which questions are still open. (Resolved questions have a best answer.) You can sort your questions by:

- **Newest**—Shows your most recently asked questions at the top of the list
- **Recent Activity**—Shows your most recently asked questions and your questions that have the most recent replies at the top of the list
- **Oldest**—Shows your oldest questions at the top of the list

When viewing a list of your replies, the question title appears as a link followed by your reply. You can sort your replies by:

- **Newest**—Shows your most recently posted replies at the top of the list.
- **Oldest**—Shows your oldest replies at the top of the list.
- **Most Votes**—Shows your replies that have received the greatest number of "likes" and "dislikes" (added together) at the top of the list.

The following table describes the icons displayed on the page:

Icon	Description
	A question that has been resolved. To resolve a question, the person who asked the question <a href="#">chooses a reply as the best answer</a> .
	A question that community members have replied to. For example, this icon represents a question with four replies. If a question has no replies, a "0" appears in this icon.
	A reply to a question.
	A reply that has been marked as the best answer to a question.

### SEE ALSO:

- [Answers Overview](#)
- [Asking a Question](#)
- [Replying to a Question](#)

### EDITIONS

Available in: **Salesforce Classic**

Answers is available in: **Enterprise, Performance, Unlimited, and Developer** Editions.

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To vote for replies:

- "Read" on questions

## Creating an Article from a Reply

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

In an answers community, you may want to turn a particularly helpful answer into an article in your [knowledge base](#). To create an article:

1. Click the question title to view a detail page showing the question and its replies.
2. On the reply you want to add to the knowledge base, click **Promote to Article**.
3. Edit your article. The fields that appear depend on the default article type assigned to replies, but the following is true for all article types:
  - The `title` field contains the title of the question.
  - The `summary` field contains the reply.
  - You can make new data category selections for the article. Unlike answers, articles support multiple category groups.

 **Note:** An administrator can change the article type and assignee.

4. Click **Save**. The original reply now has a status message indicating its association with an article. When the article is published, the message on the reply includes a link to the article.

### SEE ALSO:

[Answers Overview](#)

[Salesforce Knowledge Overview](#)

[Publishing Articles and Translations](#)

### EDITIONS

Available in: **Salesforce Classic**

Data categories and answers are available in: **Enterprise, Performance, Unlimited, and Developer Editions**.

Salesforce Knowledge is available for an additional cost in **Enterprise and Unlimited** editions.

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To promote a reply:

- "Create" and "Read" on the article type used to promote replies

AND

"Edit" on questions

AND

Knowledge User checked on user detail page

## Escalating a Question to a Case

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

If a question remains unresolved or its reply isn't satisfactory, administrators and trusted community members can escalate the question to a case. After a case is created, the question detail page provides a link to the case for the life of the question. This link also shows the status of the case.

 **Note:** Closing the case does not mark the question as resolved, and resolving the question does not close the case. The case and the question must be updated separately.

To escalate a question to a case:

1. Click the question title.
2. On the question detail page, click **Escalate to Case**. This button only appears if an administrator has configured the appropriate case settings.
3. Update the case fields if you want to change any default values. The question title automatically becomes the case `Subject`.
4. Click **Save**. You are returned to the question detail page and the case is now available for the `Case Owner` to resolve.

SEE ALSO:

[Asking a Question](#)  
[Creating Cases](#)

### EDITIONS

Available in: **Salesforce Classic**

Answers is available in: **Enterprise, Performance, Unlimited, and Developer Editions.**

### USER PERMISSIONS

To view the Answers tab:

- "Read" on questions

To ask and reply to questions:

- "Create" on questions

To create cases:

- "Create" on cases

## Ideas Overview

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation.



**Tip:** Salesforce offers its own Ideas community for Salesforce users to submit product feedback and suggest new features. To visit, go to <http://ideas.salesforce.com>.

## Ideas Terminology

The following terminology is used for Ideas:

### Category, Ideas

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the Categories picklist on the Post Ideas page lets users add categories to their ideas. For example, if your ideas zone has the focus "Improvements to our clothing line," then you might set up categories such as "Shirts," "Jackets," and "Slacks." Each organization has one common set of categories that can be added or removed from each zone. An administrator defines separate categories for their ideas and answers zones.

### Comment

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

### Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

### Community Expert

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When community experts post comments or ideas, a unique icon (🌟👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

### Demote

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

### Half-life

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life. This setting affects all zones in your organization.

### Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is "Ideas for car features," an appropriate idea for that zone might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular zone is "Ideas for our company's employee benefits," an appropriate idea for that zone might have the title "On-site day care."

### Idea Themes

Idea Themes provide a forum in which you invite community members to post ideas about specific topics so that community members can solve problems or propose innovations for your company.

## EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

**Point**

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points (promote adds 10 points and demote removes 10 points). An idea's total number of points displays to the left of the idea.

**Popular Ideas**

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

**Portal**

If your organization has a Customer Portal or partner portal, you can add the Ideas tab to either or both portals so that portal users can participate in their own Ideas communities. The Zone list at the top of the Ideas tab lists all the available zones, and each zone contains its own unique group of ideas.

**Promote**

If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

**Recent Activity**

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. For example, this page lists all the ideas and comments you have posted to a zone as well as the ideas you have voted on. You can view your Recent Activity page by clicking your nickname located on the right side of the Ideas tab.

**Status**

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

**Top All Time Ideas**

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This allows you to see the most popular ideas in the history of your Ideas zone.

**Vote, Idea**

In an ideas community, a vote means you have either promoted or demoted an idea. After you vote on an idea, your nickname displays at the bottom of the idea's detail page to track that your vote was made. You can use your Recent Activity page to see a list of all the ideas you have voted on.

**Zone**

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.

## Using Ideas

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation. You can:

- [Post ideas](#)
- [View ideas](#) or [Idea Themes](#)
- [Search for ideas](#)
- [Vote for ideas](#)
- [Comment on ideas](#)
- [View recent activity and replies](#)
- [Subscribe to syndication feeds](#)

Each time you click the Ideas tab, the Popular Ideas subtab displays ideas in all categories. To change your current view, click one of the other subtabs like Recent Ideas or Top All-Time. Click  **List** to toggle back to the list view.

### SEE ALSO:

[Ideas Overview](#)

[Administrator setup guide: Salesforce Ideas Implementation Guide](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

## Viewing Ideas

The following sections describe how to view ideas:

- [Accessing the Ideas Tab in Salesforce](#)
- [Accessing the Ideas Tab in a Portal](#)
- [Browsing Popular Ideas](#)
- [Browsing Recent Ideas](#)
- [Browsing Top Ideas of All Time](#)
- [Viewing Ideas by Category](#)
- [Viewing Ideas by Status](#)
- [Browsing Ideas in Other Zones](#)
- [Viewing the Details of an Idea](#)

### Accessing the Ideas Tab in Salesforce

In Salesforce, the Ideas tab is available by default in the Community app. You can select this app from the Force.com app menu in the top right corner of any Salesforce page.

Note that your administrator may have customized your profile to also display the Ideas tab in other apps. Also, your administrator may have renamed the Ideas tab to an alternate tab name.

Click  **Tab** to display the Ideas tab. Click  **List** to toggle back to the list view.

 **Tip:** The Zone list at the top of the Ideas tab lists all the available zones, and each zone contains its own unique group of ideas.

### Accessing the Ideas Tab in a Salesforce.com Community

If your organization has created a Salesforce.com Community, your administrator can display the Ideas tab to the community by adding it to the list of selected tabs during setup of the community.

### Accessing the Ideas Tab in a Portal

If your organization has portal users who have access to a Customer Portal or partner portal, your portal's administrator can display the Ideas tab on either type of portal. The ideas that display in a portal are either created through a portal or are created internally in Salesforce and published for display in a portal.

### Browsing Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

### Browsing Recent Ideas

The Recent Ideas subtab lists the ideas that have most recently been submitted. Newer ideas display above older ideas.

## EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

### Browsing Top Ideas of All Time

The Top All-Time subtab lists the ideas with the most points. The difference between the Top All-Time subtab and the Popular Ideas subtab is that the Top All-Time subtab displays the top ideas of all time by number of points, whereas the Popular Ideas subtab uses an algorithm to display the ideas that have received the most recent positive votes.

### Viewing Ideas by Category

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas.

To browse ideas by category, select a category from the `View Category` drop-down list. Alternatively, click the category link at the bottom of the idea description, next to the user who posted the idea.

### Viewing Ideas by Idea Themes

You can view all of the ideas that are posted to an idea theme. From the Idea Themes detail page, you can manage an idea theme and its related ideas.

### Viewing Ideas by Status

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

To view all ideas of a particular status, go to the Ideas tab and select a value from the `Status` drop-down list. Alternatively, click the status link next to an idea to view all ideas in the zone with that status.

### Browsing Ideas in Other Zones

Administrators can create multiple zones with each zone having its own unique list of ideas. For this reason, it is important to verify you are viewing the correct zone when browsing ideas. To browse ideas in a specific zone, select a zone from the list of zones the top of the page.

### Viewing the Details of an Idea

Click the title of an idea to open the detail page of that idea. The detail page of an idea includes the following sections:

- The details of the idea, including its full text and number of points
- The related idea theme and the zone to which it belongs.
- All [comments](#) that have been submitted for the idea
- An area for adding a new comment
- A list of the last 100 users who have voted (promoted or demoted) for the idea, sorted left to right from most recent vote to oldest vote

- If you are an administrator, the detail page lets you edit, delete, and merge ideas.

## SEE ALSO:

- [Ideas Overview](#)
- [Voting on Ideas](#)
- [Commenting on Ideas](#)
- [Posting and Editing Ideas](#)
- [Using Ideas](#)
- [Tip sheet: Using Salesforce Ideas](#)

## Voting on Ideas

In an ideas community, a vote means you have either promoted or demoted an idea. If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

To vote on an idea:

1. On the Ideas tab, locate an idea you want to promote or demote.
2. To add 10 points to the idea, click **promote** next to the idea. To subtract 10 points from the idea, click **demote**. After you have voted, your Nickname displays at the bottom of the idea's detail page to track that your vote was made.

-  **Note:** When you [post a new idea](#), you automatically cast a vote for that idea and 10 points are added to the idea's score.

## SEE ALSO:

- [Ideas Overview](#)
- [Viewing Ideas](#)
- [Using Ideas](#)
- [Viewing Your Recent Activity Page](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

## Commenting on Ideas

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

### Adding Comments to Ideas

Add comments to ideas to share your thoughts and opinions with other community members:

1. On the Ideas tab, locate an idea on which you want to add a comment.
2. Click either the title of the idea or the **Comments** link below the idea description.
3. On the detail page for the idea, type your comments into the text entry area in the Add Your Comment section. You can enter up to 4,000 characters.

If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only.

4. Click **Post** to submit your comment.

Your newly added comment displays in the Comments related list on the idea detail page.

### Editing Comments on Ideas

To edit a comment that you have submitted on an idea:

1. On the detail page of the idea, click **Edit** next to your comment.
2. Modify your comment as desired.
3. Click **Apply** to save your work.

### Deleting Comments on Ideas

Deleting comments on ideas requires the "Delete" permission on ideas.

1. On the detail page of the idea, click **Del** next to your comment.
2. Click **OK**.

### Viewing Recently Posted Comments

To view the comments that have most recently been posted in your Ideas community, click the Comments subtab and select a zone in which to view comments. Click the text of a comment to view the detail page of the appropriate idea.

On the Comments subtab:

- Comments are listed in chronological order from newest to oldest.
- The title of the idea on which the comment was posted displays above the comment.
- The alias of the user who posted the comment displays next to the comment text.

## EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

- The total number of comments on the idea displays in brackets below the comment text. For example, `Comments [20]` indicates that the idea has twenty comments.

## SEE ALSO:

- [Ideas Overview](#)
- [Viewing Ideas](#)
- [Using Ideas](#)
- [Liking Comments on Ideas](#)

## Liking Comments on Ideas

Like a comment to show that you endorse it.

Below a comment that is associated with an idea, click **Like**.

To stop liking a comment, click **Unlike**.

Ideas counts the number of likes a comment gets. When a comment receives a like, a point is added to the comment's total score and to the reputation of the user who posted the comments.

## SEE ALSO:

- [Commenting on Ideas](#)

## Deleting Ideas

To delete an idea:

1. Click the name of an idea to open the detail page.
2. Click the **Delete** button.
3. Click **OK**.

The idea, its comments, and any child ideas are moved to the Recycle Bin. Note that undeleting an idea from the Recycle Bin also restores the idea's comments, votes, and child ideas.

## SEE ALSO:

- [Merging Ideas](#)
- [Posting and Editing Ideas](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To delete ideas and comments:

- "Delete" on ideas

## Viewing Your Recent Activity Page

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. To view your Recent Activity page, go to the Ideas tab and click your Nickname link on the right side of the page. To view the Recent Activity page of another member of the zone, click the community member's name that appears below any idea or comment they have posted. You can view activity for the different zones you have access to by selecting a zone from the `zone` list.

The Recent Activity page uses the following icons to identify the various types of activity:

-  identifies the ideas you have submitted.
-  identifies the ideas you have voted on.
-  identifies the comments you have posted to ideas as well as the comments other users have posted to your ideas.

For additional detail, click the following links located on the left side of the Recent Activity page:

- Ideas Submitted lists the ideas you have posted to this zone. The most recent idea appears first.
- Ideas Voted On lists the ideas in this zone that you have either promoted or demoted.
- Recent Replies displays the most recent comment posted to each of your ideas, as well as the most recent comment posted to each idea you have previously commented on. This section is not displayed when viewing another community member's recent activity.

To quickly determine the number of recent replies you have received, look next to the recent replies icon () in the upper right corner of the Ideas tab. This icon only appears when you have received a new reply.

 **Note:** You can't upload your own picture to replace the default image.

SEE ALSO:

[Ideas Overview](#)

[Viewing Ideas](#)

[Using Ideas](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

## Subscribing to Syndication Feeds for Ideas

Syndication feeds enable users to subscribe to changes within Ideas and receive updates in external news readers. For users to be able to subscribe to Ideas syndication feeds, the following prerequisites are necessary:

- Ideas must be exposed publicly using Force.com sites.
- The `Categories` field must be enabled in Ideas. This field is enabled by default for some organizations.

To subscribe to a syndication feed, click the feeds icon () on the following Ideas pages:

- [Popular Ideas](#) subtab
- [Recent Ideas](#) subtab
- [Top All-Time](#) subtab
- [Comments](#) subtab

This feed lists comments separately even when they belong to the same idea, whereas the Comments subtab groups comments for a single idea together and only shows the number of recent comments for that idea.

- [Recent Activity page](#)

To subscribe to a feed that includes all the comments posted by a specific community member, click the community member's name that appears below any idea or comment he or she has posted. Then click the feeds icon on the community member's Recent Activity page. When you subscribe to another community member's Recent Activity feed, the feed only includes recent comments from that community member and no other user.

-  **Note:** Child ideas (ideas that have been merged with a master idea) are not included in any feeds. Only master ideas are included.

SEE ALSO:

[Ideas Overview](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

## Posting and Editing Ideas

### Posting Ideas

1. Use the search box in the sidebar to search for existing ideas that match your idea. This helps reduce the number of duplicate ideas in the community. If no existing ideas match your idea, proceed to the next step.
2. Create a new idea using one of the following options:
  - On the Ideas tab, select the appropriate community from the Community list at the top of the page and click **Post Idea**.
  - From the Ideas list view, click **New Idea**, then select a community, and click **Continue**.
  - From the sidebar, select **Idea** from the **Create New** drop-down list, select a community, and click **Continue**.
3. If you're posting the idea to an [idea theme](#), select one from the list. You can only post ideas to idea themes that exist within your community.
4. Enter a title for your idea no longer than 255 characters.
 

After you enter the title, Salesforce searches the community for ideas with the same words in their title or description and then displays the top five matching ideas. If one of these ideas looks similar to your own, click that idea's title to open its detail page in a new window. From the detail page, you can read a description of the idea and vote for it instead of posting your duplicate idea to the community. If none of the ideas in the list are similar to your idea, proceed with the following steps to post your unique idea.
5. In the description area, enter the details of your idea.
 

If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only.
6. Choose one or more categories for your idea.
7. If you are an administrator, optionally choose a status for your idea. The **Status** drop-down list is only visible to administrators.
8. If enabled by your administrator, you can add an attachment to your idea:
  - Click **Browse** to locate and attach a file from your computer.
 

You can attach any supported file types, including Microsoft® PowerPoint® presentations and Excel® spreadsheets, Adobe® PDF files, image files, audio files, and video files. The maximum attachment size is determined by your organization.
  - Optionally, type a title for the file. If you don't enter a title, the filename appears as the attachment's title.
9. Click **Post**.

Your new idea displays at the top of the Recent Ideas subtab, and your vote (promote) is automatically applied to the idea. Each vote is always worth 10 points.

 **Tip:** Use the following writing tips to make your idea easier for others to read and understand:

- Use complete sentences.
- Be as concise and direct as possible.
- Check your spelling and punctuation.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Ideas tab:

- "Read" on ideas

To view and vote for ideas:

- "Read" on ideas

To create ideas and add comments to ideas:

- "Create" on ideas

To edit ideas and edit comments on ideas:

- "Edit" on ideas

## Editing Ideas

If you have the “edit” permission on ideas, you can edit the details of an existing idea:

1. On the Ideas tab, click the title of an idea.
2. Click **Edit**.
3. Modify the title, description, category, and status (administrators only) of the idea as appropriate.
4. Click **Apply** to save your work.

Editing an idea's details does not allow you to edit the [comments on an idea](#).

### SEE ALSO:

[Ideas Overview](#)

[Using Ideas](#)

[Tip sheet: Using Salesforce Ideas](#)

## Merging Ideas

### Overview

As more users contribute to a zone, the number of duplicate ideas often increases. Duplicate ideas make it difficult to measure feedback because votes and comments are spread out over many similar ideas. The best way to resolve this issue is to merge duplicate ideas together so one idea becomes the master to one or more child ideas.

Note the following about merging ideas.

- Once you merge ideas they cannot be separated.
- All votes belonging to child ideas are transferred to the master idea. If the same community member votes for two ideas that are eventually merged, only the vote for the master idea is kept; the vote for the child idea is discarded.
- Users can only vote for and add comments to a master idea.
- You cannot merge ideas in separate zones.
- Deleting a parent idea automatically deletes all child ideas. Child ideas cannot be deleted individually.
- The master idea does not inherit the status and category values of its child ideas.
- When an idea is merged and becomes a child idea, the child idea still appears on the Ideas Submitted page but not on any other pages in a zone member's [Recent Activity](#).
- Merged ideas don't appear in the list of submitted ideas on the Idea Themes detail page and aren't counted in the `Submitted Ideas` field.
- When you merge a child idea, you can no longer edit the Idea Theme field.
- A child idea that has been merged is still visible to the user who submitted the idea from the Ideas Submitted list on the user's Recent Activity page.

### Merging Ideas

To locate duplicate ideas and merge them together:

1. On the Ideas tab, click the title of an idea that you want to merge.

### EDITIONS

Available in: **Salesforce Classic**

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To merge multiple ideas:

- “Edit” on ideas

2. On the idea's detail page, click **Find Duplicates**. Salesforce searches all the ideas within the zone and displays the five ideas with titles that most closely match the current idea's title.
3. If the Possible Duplicates list does not contain any ideas that you want to merge, enter keywords in the `Search for Duplicates` field and click **Search**. Salesforce displays a new list of possible duplicate ideas.
4. From the Possible Duplicates list, select the ideas that you want to merge.  
To view the details of a possible duplicate idea, click the idea's title. Use your browser's back button to return to the search results.
5. Click **Merge with Current Idea**.
6. Select the idea that you want to be the master idea, and click **Merge**.
7. Click **OK** to complete the merge.

## Tips on Using Ideas

### USER PERMISSIONS

To view the Ideas tab:	"Read" on ideas
To view and vote for ideas:	"Read" on ideas
To create ideas and add comments to ideas:	"Create" on ideas
To edit ideas and edit comments on ideas:	"Edit" on ideas
To create communities:	"Customize Application"

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Consider the following information when setting up and using Ideas:

- To monitor the activity of Ideas, you can:
  - Create a workflow rule or trigger based on the number of comments an idea receives. You cannot create a workflow rule or trigger based on an idea's vote total or vote count. You also cannot create a trigger that inserts or deletes a comment when the Idea object is updated.
  - Create a custom report based on an idea's vote score or number of comments.
- When posting an idea or comment, you can include a URL in the idea's description or comment field, but you cannot attach a file or add a note to an idea.
- Master detail relationships are not supported.
- Ideas does not support workflow tasks, outbound messages, and approvals.
- Ideas does not support custom links.
- The Ideas detail page does not contain related lists.
- The data export feature archives all your Ideas data with the exception of deleted ideas and deleted comments.
- You cannot create activities and events for Ideas.
- When using standard or custom Idea fields, note the following:
  - History tracking is not supported.
  - Field dependencies and roll-up summary fields are not supported.
  - Formula fields are not available for the Community object.

## Tips for Using the HTML Editor

The HTML editor gives users WYSIWYG HTML editing capabilities, allowing them to:

- Insert an image
- Insert hyperlinks
- Change paragraph alignment
- Create bulleted and numbered lists

### Implementation Tips

- HTML tags you enter into the HTML editor will display to users as text.
- In related lists, search results, and hover details, Salesforce does not display text with HTML formatting or images.
- Hyperlinks open in a new browser window when users click on them. The HTML editor supports HTTP, HTTPS, and mailto hyperlinks.
- To insert an image, click  and either browse to an image file or specify the image's web address. Enter a description that appears when a user hovers over the image and when the image is not available. The image must have a URL that Salesforce can access.
- Images do not show up in list views and reports.
- You cannot disable individual features of the HTML editor. For example, you cannot disable its hyperlink and image capabilities.
- The HTML editor supports all languages that Salesforce supports.
- For security purposes, the HTML editor only allows the tags and attributes listed in [Supported HTML Tags and Attributes](#) on page 88. Salesforce automatically removes unsupported tags and attributes when you save an idea description or comment. Salesforce also removes potentially malicious HTML. Note that Salesforce does not notify users when unsupported or potentially malicious HTML is removed.
- The HTML editor does not support JavaScript or Cascading Style Sheets (CSS).

### Supported HTML Tags and Attributes

The HTML editor supports the following tags:

<a>	<dt>	<q>
<abbr>	<em>	<samp>
<acronym>	<font>	<small>
<address>	<h1>	<span>
<b>	<h2>	<strike>
<bdo>	<h3>	<strong>
<big>	<h4>	<sub>
<blockquote>	<h5>	<sup>
 	<h6>	<table>
<caption>	<hr>	<tbody>
<cite>	<i>	<td>
<code>	<img>	<tfoot>

<code>&lt;col&gt;</code>	<code>&lt;ins&gt;</code>	<code>&lt;th&gt;</code>
<code>&lt;colgroup&gt;</code>	<code>&lt;kbd&gt;</code>	<code>&lt;thead&gt;</code>
<code>&lt;dd&gt;</code>	<code>&lt;li&gt;</code>	<code>&lt;tr&gt;</code>
<code>&lt;del&gt;</code>	<code>&lt;ol&gt;</code>	<code>&lt;tt&gt;</code>
<code>&lt;dfn&gt;</code>	<code>&lt;p&gt;</code>	<code>&lt;ul&gt;</code>
<code>&lt;div&gt;</code>	<code>&lt;pre&gt;</code>	<code>&lt;var&gt;</code>
<code>&lt;dl&gt;</code>		

The above tags can include the following attributes:

<code>alt</code>	<code>face</code>	<code>size</code>
<code>background</code>	<code>height</code>	<code>src</code>
<code>border</code>	<code>href</code>	<code>style</code>
<code>class</code>	<code>name</code>	<code>target</code>
<code>colspan</code>	<code>rowspan</code>	<code>width</code>

The above attributes can include URLs that begin with the following:

- `http:`
- `https:`
- `file:`
- `ftp:`
- `mailto:`
- `#`
- `/` for relative links

### Enabling the HTML Editor in Ideas

The HTML editor is enabled by default for most organizations. If your organization does not have the HTML editor already enabled, an administrator can enable it as described in Customizing Ideas Settings.

 **Warning:** Once you enable the HTML editor, you cannot disable it.

Before enabling the HTML editor, note the following:

- Each HTML idea description has a maximum size of the 32 KB. Each comment has a maximum size of 4 KB.
- If you use the HTML editor to edit and save an idea description or comment that was in text format, Salesforce saves the description or comment in HTML format.

- In list views and search results, Salesforce displays only the first 255 characters of an idea's description or comment. This number includes HTML tags.

## SEE ALSO:

- [Ideas Overview](#)
- [Using Ideas](#)
- [Commenting on Ideas](#)
- [Posting and Editing Ideas](#)

## Idea Themes

Watch a Demo: [▶ Encourage Collaboration with Idea Themes](#)

Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company. For example, to engage with your community and create excitement around the launch of a new product, you can ask members to work together to create the product's name. Community members collaborate and add ideas to the idea theme, while you monitor their activities as they vote and comment on each other's ideas until they find a winner.

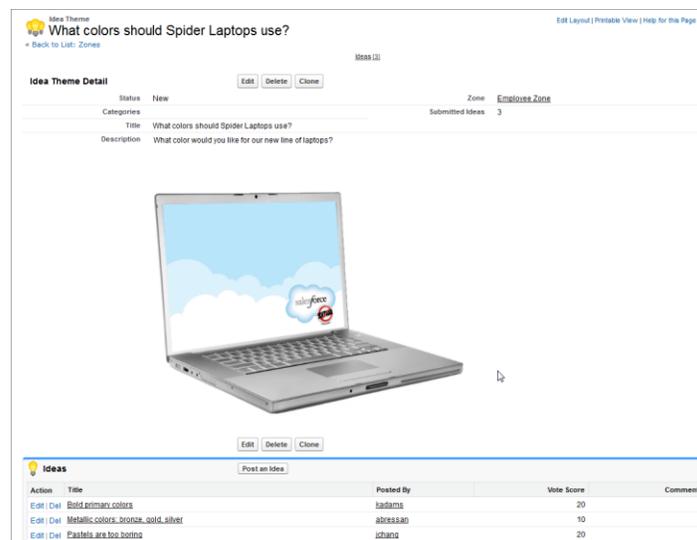
When you create an idea theme, you can add pictures, videos, and other multimedia content to showcase or explain the idea that you're presenting to the community. You can also view and manage the list of ideas that have been posted to the idea theme.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer



## SEE ALSO:

- [Creating and Editing Idea Themes](#)
- [Using Idea Themes](#)
- [Managing Idea Themes](#)

## Using Idea Themes

Click the Idea Themes tab to view, filter, moderate, and create themes from lists.

- Click **Create New View** to define your own custom list views. To edit or delete any view you created, select it from the View drop-down list and click **Edit**. If your organization has multiple communities, we recommend you add `Community` to your views so that you can see the name of the community associated with each idea theme. Adding the `zone` field to the view also helps with managing multiple zones.
- Click **New Idea Theme** from the Idea Themes list view page or click **New** from the Recent Idea Themes list on the Idea Themes overview page to [create a new idea theme](#).
- Click  to refresh a list that's been updated.
- Click **Edit** or **Del** to [edit](#) or delete an idea theme.

 **Note:** Deleting an idea theme also deletes the ideas that are associated with it. Conversely, undeleting an idea theme also undeletes the ideas that are associated with it.

SEE ALSO:

[Creating and Editing Idea Themes](#)

[Idea Themes](#)

[Managing Idea Themes](#)

## Creating and Editing Idea Themes

You can use the Idea Themes tab in both the application and the console to create and edit Idea Themes for the communities that you manage.

1. Click **New Idea Theme** from the Idea Themes list view page or click **New** from the Recent Idea Themes list on the Idea Themes overview page.
2. Select a zone for the idea theme and click **Continue**.
3. Select the idea theme's **Status**.
4. Select a category for the theme.
5. Add a title for the idea theme.
6. Optionally, enter a description of the theme.  
Use the HTML editor to format your text or add an image or video.
7. Click **Save**.

SEE ALSO:

[Idea Themes](#)

[Using Idea Themes](#)

[Managing Idea Themes](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Idea Themes tab:

- "Read" on Idea Themes

To create Idea Themes:

- "Create" on Ideas

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Idea Themes tab:

- "Read" on Idea Themes

To create Idea Themes:

- "Create" on Ideas

## Managing Idea Themes

From the Idea Themes detail page, you can manage an idea theme and its related ideas. As an administrator, you can perform the following tasks:

- [Edit](#), [Delete](#), or [Clone](#) an idea theme.
- [Edit](#) or [Delete](#) ideas that have been submitted to the idea theme.
- Move an idea from one idea theme to another in your zones.

You can do this by editing the name of the idea, which removes the idea from the current idea theme and gives you the opportunity to select a different idea theme.

- View the number of ideas that have been submitted for the idea theme. Merged ideas don't appear in the list of submitted ideas on the Idea Themes detail page and aren't counted in the Submitted Ideas field.
- [Create an idea](#) and post it to the idea theme in which you're working.

### SEE ALSO:

[Creating and Editing Idea Themes](#)

[Using Idea Themes](#)

## Using the Chatter Answers Q&A Tab

Chatter Answers is a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience.

Chatter Answers lets your customers:

- Post, browse, and reply to questions using the Q&A tab.
- Delete their own questions and replies.
- Flag questions and replies as spam, hateful, or inappropriate.
- Receive emails when their questions are answered or when best answers are chosen for questions they're following.
- Collaborate publicly or privately with support agents to resolve issues related to open cases.
- Search and review articles from Salesforce Knowledge.
- Like a post or Salesforce Knowledge article to help determine its popularity.
- Upload photos of themselves to their user profiles.
- View other users' total number of posts and number of replies marked as best answers by others.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view the Idea Themes tab:

- "Read" on Idea Themes

To create and edit Idea Themes:

- "Create" on Ideas

### EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

### USER PERMISSIONS

To view questions:

- "Read" on questions

To ask and reply to questions:

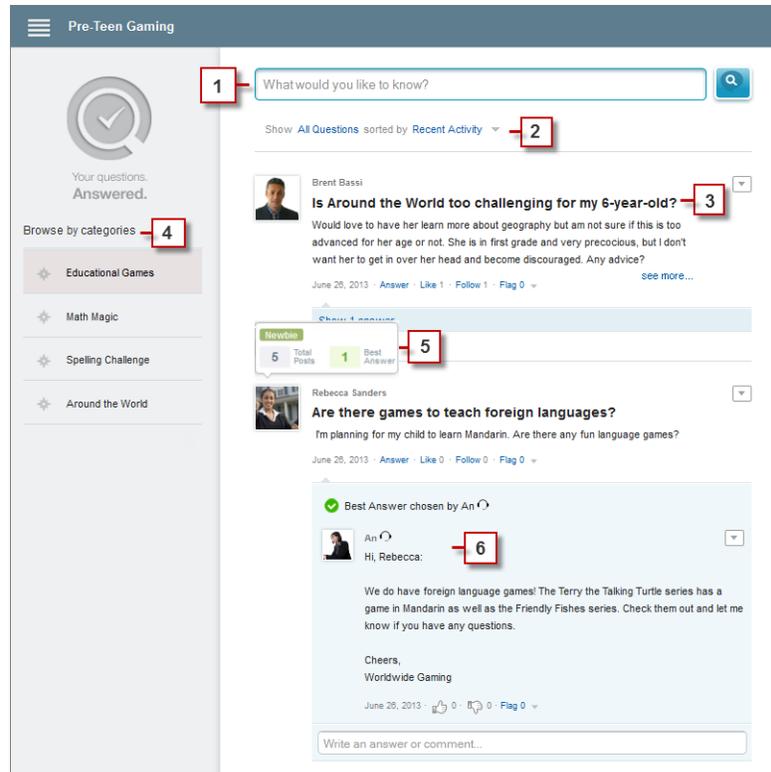
- "Create" on questions

To view cases:

- "Read" on case

To change cases:

- "Edit" on case



- 1. Search:** Customers can search for existing questions before they post their own.
- 2. Filter and Sort:** Community members and support agents can select different viewing options for questions in the feed. Searches in the Chatter Answers Q&A tab can be filtered to show questions based on:
  - **All Questions** shows all questions in the zone, as well as Salesforce Knowledge articles, when enabled.
  - **Unanswered Questions** shows all questions that don't have replies.
  - **Unsolved Questions** shows all questions that don't have a best answer.
  - **Solved Questions** shows all questions that have a best answer, as well as Salesforce Knowledge articles, when enabled.
  - **My Questions** shows all questions you've asked and are following.

You can then sort the results based on the following options:

- **Date Posted** sorts questions with the most recently asked questions appearing first.
  - **Recent Activity** sorts questions with the most recent replies and comments appearing first.
  - **Most Popular** sorts questions that have received the most likes, upvotes, and followers appearing first.
- 3. Question:** Customers can post a question to the community for help. Other members of the community can post answers or follow the question to receive email notifications on subsequent posts.
  - 4. Browse by Category:** If categories are enabled in the community, members can click the category name to show questions related to that category.
  - 5. Reputation:** Community members can earn points and ratings that display on hover over their photos in the feed
  - 6. Comment:** Community members and support agents can comment on the question, and the customer or agent can select a comment as the best answer.

Chatter Answers lets service organizations:

- Create multiple communities and organize them into different zones, with each zone having its own focus and questions.
- Brand and customize communities.
- Give agents the opportunity to respond to customers publicly or privately.
- Automate the creation of cases from questions using an Apex trigger and workflow rules.
- Deflect customer inquiries through participation.
- Encourage participation by publicly displaying user statistics.
- Moderate questions and answers from the Q&A tab in the internal Salesforce application or from the community.

A customer's question is typically answered on the Q&A tab using one of these processes:

<b>Question Answered by a Similar Question with a Best Answer</b>	<b>Question Answered by the Members within the Community</b>	<b>Question Answered by a Support Agent</b>	<b>Question Answered by a Salesforce Knowledge Article</b>
<ol style="list-style-type: none"> <li>1. A customer types a question or keyword into the Chatter Answers Q&amp;A tab and clicks <b>Post Your Question</b>.</li> <li>2. A similar question with a best answer appears in search results.</li> <li>3. The customer selects that question, and views the answer.</li> </ol>	<ol style="list-style-type: none"> <li>1. A customer types a question or keyword into the Chatter Answers Q&amp;A tab and clicks <b>Post Your Question</b>.</li> <li>2. No similar questions display in search results.</li> <li>3. The customer continues to enter a description of the question and clicks <b>Post to Community</b> to post a public question.</li> <li>4. A community member or support agent reads the question and adds a comment, which answers the customer's question.</li> </ol>	<ol style="list-style-type: none"> <li>1. A customer types a question or keyword into the Chatter Answers Q&amp;A tab and clicks <b>Post Your Question</b>.</li> <li>2. No similar questions display in search results.</li> <li>3. The customer continues to enter a description of the question and selects <b>Post Privately to Representative</b> to post a private question.</li> <li>4. The private question is converted to a case.</li> <li>5. A support agent reads the case and adds a private comment, which answers the customer's question.</li> </ol>	<ol style="list-style-type: none"> <li>1. A customer types a question or keyword into the Chatter Answers Q&amp;A tab and clicks <b>Post Your Question</b>.</li> <li>2. A similar Salesforce Knowledge article with an answer displays in search results.</li> <li>3. The customer selects the article, and views the answer.</li> </ol>

SEE ALSO:

[Chatter Answers Terminology](#)

## Chatter Answers Terminology

The following terms are used when describing Chatter Answers features and functionality.

### Answers

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

### Article

*Articles* capture information about your company's products and services that you want to make available in your knowledge base.

### Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

### Flag

An icon that users can click on a question or reply to report it as spam, hateful, or inappropriate.

### Follow

A subscription to a question that lets you receive emails when someone answers or comments on a specific question.

### Like

To show support or indicate quality or usefulness for a question, answer, or knowledge article.

### Popular

Each question's popularity is based on the number of users who **Like** it within a certain amount of time.

### Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

### Question, Private

An issue posted to an answers community, but marked **Private** so that only support agents can view and respond to it.

### Reply

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

### Topics

The sidebar that lists data categories from which your customers can browse questions and replies. For example, if you have a zone for hardware products, your topics may include laptops, desktops, and printers.

### Vote, Reply

In an answers community, a vote means you either like or dislike a reply to a question.

### Zones

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions

## EDITIONS

Available in: **Salesforce Classic**

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

SEE ALSO:

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

## Using Chatter Answers

### USER PERMISSIONS

To view questions:	"Read" on questions
To ask and reply to questions:	"Create" on questions
To view cases:	"Read" on case
To change cases:	"Edit" on case
To manage Chatter Answers (Customer Portal) users:	"Edit Self-Service Users"
To ask a private question:	"Read" on account

### EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

Chatter Answers lets you work with questions and cases that originate from customers in a zone. Once a customer posts a question to the zone, you or other customers can reply. Questions are converted to cases when they're marked `Private`, or after a time specified by your administrator.

With Chatter Answers, you can:

- [Reply to questions converted to cases.](#)
- Create custom views for cases converted from questions by filtering on `Case Origin`.
- Upload a photo to your profile so that customers can see who you are.
- [Work with Chatter Answers users, who are essentially Customer Portal users.](#)
- Assign the Chatter Answers User feature license to portal users who don't self-register so that they can access your community.
- Use the Q&A tab to moderate questions and to:
  - Review lists of questions.
  - Answer questions or add replies to questions.
  - Escalate a question to a case.
  - Delete questions or replies.
  - Select best answers for questions.
  - Promote helpful replies to Salesforce Knowledge articles.

 **Note:** We recommend that you assign a support agent to review public questions from the Q&A tab. Agents can't click **Flag** next to questions or replies that are spam, hateful, or inappropriate, but they can edit and delete questions or replies from a zones via the Q&A tab if they have the "Delete" permission on questions.

 **Tip:** To moderate many questions quickly, we recommend that support agents review questions from pinned lists on the Salesforce console (this requires adding the Q&A tab to the console's Navigation tab).

SEE ALSO:

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

## Questions Home

### USER PERMISSIONS

To view the Questions tab:	"Read" on questions
To ask and reply to questions:	"Create" on questions
To delete questions and replies:	"Delete" on questions
To escalate a question to a case:	"Create" on cases
To edit questions:	"Edit" on questions

### EDITIONS

Available in: Salesforce Classic

Answers is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions.

 **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

The Questions tab lets you view, search, filter, moderate, and create questions from lists.

- Search for questions by typing two or more letters of a question in the Search All Questions box. As you type, questions that match your search terms appear.
- Select predefined list views from the View drop-down list. Some predefined lists from which you can filter questions include:
  - Questions with Best Replies
  - Questions without Best Replies
- Click **Create New View** to define your own custom list views. To edit or delete any view you created, select it from the View drop-down list and click **Edit**.
- Click **New Question** from the Questions list view page or click **New** from the Recent Questions list on the Questions overview page to create a new question.
- Click  to refresh a list that's been updated.
- After you select a question from the list:
  - Type an answer or comment and click **Answer Customer & Zone** to reply to customers.
  - Click  and choose:
    - **Delete** to delete the question from the community.
    - **Escalate to Case** to create a case from the question.
    - **Edit** to edit the fields in an existing question.
  - Click  on one of the question's replies and choose:
    - **Delete** to delete the reply from the community.
    - **Promote to Article** to add the reply as a draft article to the knowledge base (available if it's set up by your administrator).
    - **Edit** to edit the fields in an existing reply.
  - If the question is private, meaning only support agents can view and answer it, you can click the case link to view the case automatically associated with the question.

 **Note:** The Questions tab is intended for Chatter Answers, but you can also use it to view questions from the answers feature.

SEE ALSO:

[Questions Home](#)

## Searching for Questions and Answers in the Chatter Answers Q&A Tab

Search the Chatter Answers Q&A tab to find questions and replies, best answers, and Salesforce Knowledge articles that can help find answers quickly. Searching in the Q&A tab might help you avoid posting redundant questions.

1. In the Q&A tab, enter your question in the search box.
2. Click the magnifying glass to view matching questions and articles from within the zone. If enabled, Salesforce Knowledge articles appear in the results, as well.

Searches in the Chatter Answers Q&A tab can be filtered to show questions based on:

- **All Questions** shows all questions in the zone, as well as Salesforce Knowledge articles, when enabled.
- **Unanswered Questions** shows all questions that don't have replies.
- **Unsolved Questions** shows all questions that don't have a best answer.
- **Solved Questions** shows all questions that have a best answer, as well as Salesforce Knowledge articles, when enabled.
- **My Questions** shows all questions you've asked and are following.

You can then sort the results based on the following options:

- **Date Posted** sorts questions with the most recently asked questions appearing first.
- **Recent Activity** sorts questions with the most recent replies and comments appearing first.
- **Most Popular** sorts questions that have received the most likes, upvotes, and followers appearing first.

 **Note:** From the header search box at the top of the page you can search more objects than from within the Q&A tab. Global searches by internal users return results from all questions that are available within the organization. Searches performed by all other users in Salesforce Communities return results from the questions that are available within the community.

### EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

### USER PERMISSIONS

To view questions:

- "Read" on questions

## Choose the Best Answer to a Question

After you ask a question, you should monitor the replies posted by other community members and eventually choose one of the replies as the best answer. The best answer is highlighted directly below the question so it's easy to find, which helps community members quickly identify the most useful resolution to the question.

Only Salesforce administrators and the person who asked the question can mark a reply as the best answer.

To choose the best answer:

1. From the Q&A tab, find your question and click its title.
2. Decide which reply is the best answer, and click **Choose as Best Answer**.

To identify the best answer, look at the votes (“likes” and “dislikes”) for each reply. The reply with the most “likes” probably contains the most useful information. If a question has many replies, try sorting the replies by **Most Votes** so the replies with the most likes and dislikes appear at the top of the list.

After you choose a best answer:

- The question is marked as “resolved”. Community members can continue to post and vote on replies for resolved questions.
- If another reply that you like better is posted in the future, simply choose that reply as the best answer to replace the old best answer.
- You can remove the best answer status of the reply at any time. Removing the best answer status from a reply makes it a regular reply.

## Replying to Chatter Answers Email Notifications

When you receive an email notification, you can post a response back to the community by replying to the email.

When you receive email notifications related to a question, you can conveniently reply directly from your email and the reply appears as an answer on the Q&A tab. You'll receive an email notification for the following events:

- Someone answers a question you've asked or are following.
- Customer support or a moderator selects a best answer for a question you've asked or are following.

 **Note:** To reply to email notifications, your administrator must enable email replies on the Chatter Answers Settings page.

Consider these tips when sending email replies:

- Replies must be sent from the email address specified on your profile. If you use email aliases or email forwarding services that send replies from a different email address, your replies won't be processed.
- If replies contain your personal email signature, the signature text is treated as part of your comment. Default signatures inserted by mobile devices, such as `sent from my iPhone`, are automatically removed from replies. Before replying, delete custom signatures and any extra text you don't want posted to the community.
- Attachments in replies are ignored.
- Posts that include rich text or other types of markup appear as plain text in the body of the email notification.
- Automated messages such as “out of office” responses are ignored by the system.

### EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

### USER PERMISSIONS

To view questions:

- “Read” on questions

To ask and reply to questions:

- “Create” on questions

### EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance,** and **Unlimited** Editions.

- Before replying, check the email address that displays in the **To** field of your email. Valid addresses contain tokens, or long character strings, both before and after the @symbol, such as `w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com`. Some email applications may automatically use the **From** address from the original email, such as `ReplyToQ&A@<your.com>.com`, which is not a valid address for receiving replies. If you see this shortened address in the **To** field of your reply email, replace it with the valid reply-to address in the email header information. For example, in an application such as IBM® Lotus Notes®:
  1. Open the original email.
  2. Click **View > Show > Page Source**.
  3. In the `ReplyToQ&A` section, copy the email address that looks like:  
`w8t27apy1@j321imd9gbs.d8rx.d.chatter.salesforce.com`.
  4. Paste the reply-to address in the **To** field of your reply email.

## Resolving Customer Inquiries with Others

### Adding Case Team Members

To add individual case team members or predefined case teams to a case:

1. View the case.
2. In the Case Team related list, click **Update Case Team Members**.
3. To add individual members to the case team:
  - a. Select the type of user from the **Team Member** picklist (either User, Contact, Portal User, or Partner User), and click the lookup icon () to choose a specific user.  
  
Portal User and Partner User only display if a partner portal or Customer Portal is enabled for your organization.  
  
High-volume portal users can't be added to teams.
  - b. Select the case team role to apply to the team member from the `Member Role` picklist.  
  
Every member of a case team has a role that he or she plays for the case, such as "Customer Contact" or "Case Manager." Roles determine access to the case, like Read Only or Read/Write access, and whether the member in the role is visible to users in the Customer Portal.
4. To add an existing case team, click the lookup icon () in the Predefined Case Teams section and choose a specific team.
5. Click **Save**.

### Tips on Adding Users to Case Teams

Consider the following when adding users to case teams:

- You cannot add a user to a case team if he or she is already on the case team. For example, if you add a predefined team to a case that includes a member already on the team, then that member is automatically removed from the predefined team when it is added to the case.
- Contacts can only view cases via a Customer Portal.

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To add team members:

- "Edit" on cases

- Customer Portal users can view the Case Team related list if it is included on case page layouts associated with their profile. However, Customer Portal users cannot update case teams or view case team role details on cases.
- You can filter case lists by case teams where you are a member. Simply select the **My Case Teams** filter on case list views. You can also report on case teams in which you are a member. After you run a case report, select **My team's cases** from the **View** filter.
- The possible access levels a case team member can have on a case, as defined by your administrator via case team roles, include:

Access Level	Description
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
Private	User cannot access the record in any way.

## Updating Case Team Members

You can update case team members on a case.

1. View the case.
2. On the Case Team related list, click **Update Case Team Members**.
3. Optionally:
  - Click the **Remove** link next to an existing team member or predefined case team to remove that member or team from the case.
  - Click the **Add 1 Row** link to add a new row with which you can add a case team member or predefined case team.
  - On existing team member rows, you can:
    - Select the type of user from the **Team Member** picklist (either User, Contact, Portal User, or Partner User), and click the lookup icon () to choose a specific user.
    - Select the case team role to apply to the team member from the **Member Role** picklist.

Every member of a case team has a role that he or she plays for the case, such as “Customer Contact” or “Case Manager.” Roles determine access to the case, like Read Only or Read/Write access, and whether the member in the role is visible to users in the Customer Portal.
  - On existing predefined case team rows, you can click the lookup icon () to add a specific case team.
4. Click **Save**.

## Tips on Updating Case Team Members

Consider the following when updating case team members:

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To set up case teams:

- “Customize Application”
- AND
- “Manage Users”

To add team members:

- “Edit” on cases

- You cannot add a user to a case team if he or she is already on the case team. For example, if you add a predefined team to a case that includes a member already on the team, then that member is automatically removed from the predefined team when it is added to the case.
- When you remove a user or a predefined case team from a case, you can add the user or predefined case team back to the case at any time.
- Contacts can only view cases via a Customer Portal.
- If you deactivate a user, Salesforce prompts you to remove him or her from case teams.
- Customer Portal users can view the Case Team related list if it is included on case page layouts associated with their profile. However, Customer Portal users cannot update case teams or view case team role details on cases.
- The possible access levels a case team member can have on a case, as defined by your administrator via case team roles, include:

Access Level	Description
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
Private	User cannot access the record in any way.

SEE ALSO:

[Adding Case Team Members](#)

## Case Team Fields

A case team member has the following fields, listed in alphabetical order.

Field	Description
Case Access	The level of access that a team member has to the case. The access level can be Read/Write, Read Only, or Private; but it cannot be less than your organization's default case sharing access.
Member Name	The name of a user listed as part of the case team.
Member Role	The role that the team member plays for the case, for example, "Case Manager."
Visible in Customer Portal	Indicates whether the case team member displays in the Customer Portal.

SEE ALSO:

[Adding Case Team Members](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To set up case teams:

- "Customize Application"
- AND
- "Manage Users"

To add team members:

- "Edit" on cases

# Creating and Verifying Service Agreements

## Entitlements

### Entitlements Overview

Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer may be eligible for support based on a particular asset, account, or service contract. You can use entitlements on their own or in conjunction with entitlement processes, which are timelines that contain all of the steps (or milestones) that your support team must complete in order to resolve cases.

Depending on how entitlements are set up, you can view and create them on the Entitlements tab or from the Entitlements related list on accounts, contacts, assets, or service contracts. Click **Create Case** on the Entitlements related list to create a case that automatically includes the correct entitlement, account, contact, and asset.

If set up, the Entitlements or Entitlement Template related lists let you add existing entitlements to contacts and products.

 **Note:** Entitlements don't automatically apply to cases created with Web-to-Case or Email-to-Case. If needed, you can add entitlements to these features using Apex code.

### Verifying Entitlements

You may have to verify that contacts are eligible to receive customer support, or that a service contract includes an entitlement, before you create or update cases. Depending on how entitlements are set up, you can verify them from these locations:

Verify Entitlements From	To Confirm That	Steps To Verify
Entitlements tab	A specific entitlement is available.	<ol style="list-style-type: none"> <li>1. Click the Entitlements tab.</li> <li>2. Click an entitlement name.</li> </ol>
Accounts	At least one contact on the account is eligible for support.	<ol style="list-style-type: none"> <li>1. View an account.</li> <li>2. Confirm that an entitlement is on the Entitlements related list.</li> </ol>
Contacts	Specific contacts are eligible for support.	<ol style="list-style-type: none"> <li>1. View a contact.</li> <li>2. Confirm that an entitlement is on the Entitlements related list.</li> </ol>
Assets	Specific assets (purchased products) are eligible for support.	<ol style="list-style-type: none"> <li>1. Locate an asset from a related list or an assets list view on the Products tab.</li> </ol>

#### EDITIONS

Available in: Salesforce Classic

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

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To view entitlements:

- "Read" on entitlements

Verify Entitlements From	To Confirm That	Steps To Verify
		<ol style="list-style-type: none"> <li>2. Click the asset name.</li> <li>3. Confirm that an entitlement is on the Entitlements related list.</li> </ol>
Service contracts	A specific service contract includes customer support.	<ol style="list-style-type: none"> <li>1. Click the Service Contracts tab.</li> <li>2. Click a service contract name.</li> <li>3. Confirm that an entitlement is on the Entitlements related list.</li> </ol>

 **Note:** After you verify an entitlement, you can click **Create Case** to create a new case associated with the entitlement. The case automatically includes any account, contact, or asset information from the entitlement.

#### SEE ALSO:

[Cases](#)

[Using the Entitlements Related List](#)

[Searching for Entitlements](#)

## Displaying and Editing Entitlements

### Displaying Entitlements

To view an entitlement's details, use the Entitlements tab, list pages, or the Entitlements related list on:

- Accounts
- Contacts
- Assets
- Service contracts

The Entitlements related list shows all the entitlements associated with that item.

To view an entitlement template's details, use the Entitlement Templates related list on products.

Your administrator determines where you can view entitlements and entitlement templates.

### Editing Entitlements

To update an entitlement, click **Edit**, change the fields, and click **Save**.

Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.

### Entitlements Related Lists

The lower portion of an entitlement displays information related to it, including cases, contacts, milestones, history, activities, notes, and attachments.

You can click:

- Items to display their details
- **Show [number] more** to increase the number of items in the list

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To view entitlements:

- "Read" on entitlements

To change entitlements:

- "Edit" on entitlements

- **Go to list** to display a page with the entire list.

### Sharing

You can't share entitlements. If an entitlement has an account, its sharing is inherited from account sharing.

### Printing Entitlements

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

#### SEE ALSO:

- [Entitlement Fields](#)
- [Creating Entitlements](#)
- [Deleting Entitlements](#)
- [Verifying Entitlements](#)
- [Searching for Entitlements](#)
- [Entitlements Home](#)

## Entitlement Process Fields

Here are an entitlement process' fields. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Timeline	<p>How far along a case is to reaching an entitlement process's milestones. You can click or hover your mouse pointer over each milestone to view its details. These icons represent milestones:</p> <ul style="list-style-type: none"> <li>•  Completed milestone</li> <li>•  Violated milestone</li> </ul> <p>You can drag the Handle icon () along the Timeline Zoom tool to view past and future milestones. If an entitlement process applies to the case, this field appears.</p> <p>When adding the <code>Timeline</code> field to case page layouts, click the wrench icon () next to it and select <code>Show label</code> so the field name displays on cases.</p>
Entitlement Process Start Time	The time the case entered an entitlement process. If you have "Edit" permission on cases, you can update or reset the time. When you reset the time:

#### EDITIONS

Available in: Salesforce Classic

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

Field	Description
	<ul style="list-style-type: none"> <li>Closed or completed milestones aren't affected</li> <li>Incomplete milestones are recalculated based on the new start time</li> </ul>
Entitlement Process End Time	The time a case exited an entitlement process.
Stopped	Lets you stop an entitlement process on a case, which might be necessary if you're waiting for a customer's response.
Stopped Since	Shows the date and time an entitlement process was stopped on a case.

## Viewing Entitlement Lists

The entitlements list page displays a list of entitlements. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations that have set up the console, you can view entitlement lists via the console's list view.

Depending on your user permissions on entitlements, you may see these buttons and links:

Button or Link	Description
<b>New Entitlement</b>	Click to create a new entitlement.
<b>Create Case</b>	Click to create a new case associated with the entitlement.
<b>Edit</b>	Click to edit an entitlement.
<b>Del</b>	Click to delete an entitlement.

## Searching for Entitlements

- Enter your search terms in the sidebar or header search box.
- Click **Search**.
- From the search results, click an item to open it or click **Edit**, if available.

You can also create an entitlements list view to find entitlements that match specific criteria.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view entitlement lists:

- "Read" on entitlements

To create entitlements:

- "Create" on entitlements

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view entitlements:

- "Read" on entitlements

## Creating Entitlements

Entitlements specify if a contact or account is eligible to receive customer support.

To create entitlements:

1. Click **New** on the Entitlements tab or **New Entitlement** from the Entitlements related list on accounts, assets, or service contracts.

Your administrator determines where you can create entitlements.



### Note:

- To add existing entitlements to contacts, click **Add Entitlements** on the Entitlements related list.
- To add entitlement templates to products, click **Add Entitlement Template** on the Entitlement Templates related list.

You can't create new entitlements on contacts or products.

2. Enter the following details:

Field	Description
Account Name	The name of the account associated with the entitlement.
Asset Name	The name of the asset associated with the entitlement. Assets represent specific products purchased by customers.
Business Hours	The entitlement's supported business hours. Business hours on a case take precedence over business hours on entitlements. Business hours on entitlements only add business hours to cases created from entitlements. For example, if you add an entitlement with business hours to a case that already has business hours, the entitlement's business hours are ignored.
Per Incident	Lets you limit the number of cases the entitlement supports.
Cases Per Entitlement	The total number of cases the entitlement supports. This field is only available if <code>Per Incident</code> is selected.
Contract Line Item	The name of the contract line item (product) associated with the entitlement.
End Date	The last day the entitlement is in effect.
Entitlement Name	The entitlement's name. We recommend using a descriptive name , such as <i>Phone Support</i> . This helps users better understand entitlements when they see them on related lists for accounts, contacts, and assets.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create or clone entitlements:

- "Create" on entitlements

Field	Description
Service Contract	<p>The name of the service contract associated with the entitlement.</p> <p>To quickly find a service contract in the lookup dialog box, select criteria from the <code>Filter by</code> fields. Administrators can set lookup filters to restrict filter values and results.</p>
Start Date	The first day the entitlement is in effect.
Entitlement Process	<p>The entitlement process associated with the entitlement.</p> <p>Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.</p>
Remaining Cases	<p>The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.</p> <p>This field is only available if <code>Per Incident</code> is selected.</p>
Status	<p>The entitlement's status.</p> <p>Status is determined by your organization's current system date and the entitlement's <code>Start Date</code> and <code>End Date</code>. The status is:</p> <ul style="list-style-type: none"> <li>• Active if the system date is greater than or equal to the <code>Start Date</code> and less than or equal to the <code>End Date</code>.</li> <li>• Expired if the system date is greater than the <code>End Date</code>.</li> <li>• Inactive if the system date is less than the <code>Start Date</code>.</li> </ul>
Status Icon	<p>Represents the entitlement's status by displaying one of the following icons:</p> <ul style="list-style-type: none"> <li>•  Active</li> <li>•  Expired</li> <li>•  Inactive</li> </ul>
Type	<p>The type of entitlement, such as Web or phone support.</p> <p>Administrators can customize this field's values.</p>

### 3. Click **Save**.

 **Tip:** Click **Clone** on an entitlement to quickly create a new entitlement from an existing one. This helps you create multiple entitlements for a customer.

SEE ALSO:

[Verifying Entitlements](#)

[Displaying and Editing Entitlements](#)

[Deleting Entitlements](#)

[Searching for Entitlements](#)

## Deleting Entitlements

To delete an entitlement, click **Del** next to the entitlement on the entitlement list page, or click **Delete** on the entitlement detail page.

Deleting an entitlement moves it to the Recycle Bin. Any notes, attachments, or activities associated with the entitlement are also deleted. If you undelete the entitlement, any associated items are undeleted.

 **Note:**

- The **Del** link and **Delete** button only display for users with the “Delete” permission on entitlements.
- You can't delete an entitlement with an active or closed case.

SEE ALSO:

[Searching for Entitlements](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To delete entitlements:

- “Delete” on entitlements

## Using the Entitlements Related List

The Entitlement related list displays a list of entitlements that apply to accounts, contacts, assets, or service contracts. Entitlements help you determine if your customers are eligible for customer support. You can use entitlements to verify if you can create cases for a customer.

Administrators determine an Entitlements related list's availability and contents. The following options and information display by default:

### New Entitlement

Click this button to add a new entitlement to an account, contact, asset, or service contract.

### Action

The actions you can perform on the entitlement:

- Click **Create Case** to create a new case that automatically includes the correct entitlement, account, contact, or asset.
- Click **Edit** to change the entitlement.
- Click **Del** to remove the entitlement.

### Entitlement

The entitlement's name. Click to view the entitlement's details.

### Start Date

The first day the entitlement is in effect.

### End Date

The last day the entitlement is in effect.

### Status

The entitlement's status.

### SEE ALSO:

[Verifying Entitlements](#)  
[Cases](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view entitlements on accounts, contacts, assets, or service contracts:

- "Read" on accounts, contacts, assets, or service contracts

To edit entitlements on accounts, contacts, assets, or service contracts:

- "Edit" on accounts, contacts, assets, or service contracts

To create cases:

- "Create" on cases

To change entitlements:

- "Edit" on entitlements

## Using the Contacts Related List on Entitlements

The Contacts related list on entitlements displays a list of contacts eligible to receive customer support. Your company may not allow you to provide support to customers unless they're on this list.

Administrators determine the Contacts related list's availability and content. The following options and information display by default:

### Add

Click this button to add contact(s) to the entitlement.

To search for contacts, enter a name or part of a name in the text entry field and click **Go!**. Check the boxes next to the contacts you want to add to the entitlement and click **Insert Selected**. Click **Done** to add the selected people.

### Action

The actions you can perform on the contact:

- Click **Create Case** to create a new case that automatically includes the correct entitlement, account, contact, or asset.
- Click **Remove** to remove the contact from the entitlement.

### Contact Name

The contact's name. Click to view the contact's details.

### Added By

The name of the user who added the contact to the entitlement.

Accounts are parent records of contacts. The same visibility and sharing settings that apply to the parent account apply to contacts. Associating a contact to an entitlement doesn't share the entitlement record with the contact or the related portal or community user.

## Using the Milestones Related List on Entitlements

The Milestones related list on entitlements displays a list of milestones that apply to an entitlement. 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.

Administrators determine the Milestones related list's availability and contents. The following information displays by default:

### Order

The order in which the milestone is processed if a case matches the criteria of more than one milestone in an entitlement process.

### Name

The milestone's name.

### Description

The milestone's description.

### Criteria

The criteria a case must meet for a milestone to apply to it. For example, *Priority equals High*.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view contacts on entitlements:

- "Read" on entitlements
- AND

"Read" on contacts and "Read" on entitlement contacts

To create cases:

- "Create" on cases

To change entitlements:

- "Edit" on entitlements

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view milestones on entitlements:

- "Read" on entitlements

### Minutes to Complete Milestone

The amount of time to successfully complete the milestone. This field only displays the milestone's `Time Trigger (Minutes)`; it doesn't track whether the milestone status is complete or in violation on cases.

## Entitlements Home

Clicking on the Entitlements tab displays the Entitlements home page.

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- If your administrator has set up the console to include entitlements, click the Console tab to find, view, and edit entitlements and their associated records on one screen.
- In the **Recent Entitlements** section, select an item from the drop-down list to display a brief list of the top entitlements matching that criteria. From the list, you can click any entitlement name to go directly to the entitlement. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the Entitlements Tab search layout defined by your administrator and by field-level security settings. The Recent Entitlements choices are:

Recent Entitlements Choice	Description
<b>Recently Viewed</b>	The last ten or twenty-five entitlements you viewed, with the most recently viewed entitlement listed first. This list is derived from your recent items and includes records owned by you and other users.

- In the **Recent Entitlements** section, click **New** to create a new entitlement.
- In the **Reports** section, click **Go to Reports** to create customized reports that include entitlements.

#### SEE ALSO:

[Creating Entitlements](#)

[Displaying and Editing Entitlements](#)

[Deleting Entitlements](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view the Entitlements tab:

- "Read" on entitlements

To view entitlements:

- "Read" on entitlements

To create entitlements:

- "Create" on entitlements

## Entitlements History

The Entitlement History related list tracks entitlement changes. Any time a user modifies trackable standard or custom fields, a new entry is added to the related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related list itself aren't tracked.

## Entitlement Fields

Here are an entitlement's fields. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Account Name	The name of the account associated with the entitlement.
Asset Name	The name of the asset associated with the entitlement.  Assets represent specific products purchased by customers.
Business Hours	The entitlement's supported business hours.  Business hours on a case take precedence over business hours on entitlements. Business hours on entitlements only add business hours to cases created from entitlements. For example, if you add an entitlement with business hours to a case that already has business hours, the entitlement's business hours are ignored.
Per Incident	Lets you limit the number of cases the entitlement supports.
Cases Per Entitlement	The total number of cases the entitlement supports.  This field is only available if <code>Per Incident</code> is selected.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view entitlements:

- "Read" on entitlements

### EDITIONS

Available in: Salesforce Classic

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

Field	Description
Contract Line Item	The name of the contract line item (product) associated with the entitlement.
End Date	The last day the entitlement is in effect.
Entitlement Name	The entitlement's name.  We recommend using a descriptive name , such as <i>Phone Support</i> . This helps users better understand entitlements when they see them on related lists for accounts, contacts, and assets.
Service Contract	The name of the service contract associated with the entitlement.  To quickly find a service contract in the lookup dialog box, select criteria from the <b>Filter by</b> fields. Administrators can set lookup filters to restrict filter values and results.
Start Date	The first day the entitlement is in effect.
Entitlement Process	The entitlement process associated with the entitlement.  Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.
Remaining Cases	The number of cases the entitlement can support. This field decreases in value by one each time a case is created with the entitlement.  This field is only available if <b>Per Incident</b> is selected.
Status	The entitlement's status.  Status is determined by your organization's current system date and the entitlement's <b>Start Date</b> and <b>End Date</b> . The status is: <ul style="list-style-type: none"> <li>• Active if the system date is greater than or equal to the <b>Start Date</b> and less than or equal to the <b>End Date</b>.</li> <li>• Expired if the system date is greater than the <b>End Date</b>.</li> <li>• Inactive if the system date is less than the <b>Start Date</b>.</li> </ul>
Status Icon	Represents the entitlement's status by displaying one of the following icons: <ul style="list-style-type: none"> <li>•  Active</li> <li>•  Expired</li> <li>•  Inactive</li> </ul>

Field	Description
Type	The type of entitlement, such as Web or phone support. Administrators can customize this field's values.

SEE ALSO:

[Verifying Entitlements](#)

## Service Contracts

### Displaying and Editing Service Contracts

#### Displaying Service Contracts

To view a service contract's details, click a service contract on the Service Contracts tab, list pages, or the Service Contracts related list on:

- Accounts
- Contacts

The Service Contracts related list shows all the service contracts associated with that item.

Your administrator determines where you can view service contracts.

#### Editing Service Contracts

To update a service contract, click **Edit**, change the fields, and click **Save**.

Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.

#### Service Contracts Related Lists

The lower portion of a service contract displays its related information, including entitlements, contract line items, history, activities, notes, and attachments.

You can click:

- Items to display their details
- **Show [number] more** to increase the number of items in the list
- **Go to list** to display a page with the entire list.

#### Sharing

Click **Sharing** to share a service contract with other users, groups, or roles. See [Sharing Service Contracts](#) on page 120.

#### Printing Service Contracts

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

SEE ALSO:

[Service Contract Fields](#)

[Creating Service Contracts](#)

[Verifying Entitlements](#)

[Deleting Service Contracts](#)

[Searching for Service Contracts](#)

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To view service contracts:

- "Read" on service contracts

To change service contracts:

- "Edit" on service contracts

## Viewing Service Contract Lists

From the service contracts list page, you can view detailed service contract information and access other related items. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations that have set up the console, you can view service contract lists via the [console's list view](#).

- Depending on your user permissions on service contracts, you may see these buttons and links:

Button or Link	Description
<b>New Service Contract</b>	Click to <a href="#">create a new service contract</a> .
<b>Edit</b>	Click to <a href="#">edit a service contract</a> .
<b>Del</b>	Click to <a href="#">delete a service contract</a> .

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.

 **Note:** You may be able to grant additional access to service contracts beyond what the sharing model allows. See [Sharing Service Contracts](#) on page 120.

## Searching for Service Contracts

- Enter your search terms in the sidebar or header search box.
- Click **Search**.
- From the search results, click an item to open it or click **Edit**, if available.

You can also create a custom list view to find service contracts that match specific criteria.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view service contract lists:

- "Read" on service contracts

To create service contracts:

- "Create" on service contracts

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view service contracts:

- "Read" on service contracts

## Creating Service Contracts

Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

To create service contracts:

1. Click **New** on the Service Contracts tab or **New Service Contract** from the Service Contracts related list on accounts or contacts.

Your administrator determines where you can create service contracts.

2. Enter the following details:

Field	Description
Account Name	The name of the account that purchased or owns the service contract.
Activation Date	The initial day the service contract went into effect (whereas Start Date may include a renewal date).
Approval Status	An approval process status field.
Billing City	City portion of billing address. Up to 40 characters are allowed in this field.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing State	State or province portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing Zip	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.
Contact Name	Name of the contact associated with the service contract. Select from the drop-down list.
Contract Name	Name of the service contract.
Contract Number	Automatically-generated number identifying the service contract. (Read only)
Created By	User who created the service contract. (Read only)
Created Date	The date the service contract was created (whereas Activation Date is the initial

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To create or clone service contracts:

- "Create" on service contracts

Field	Description
Currency	<p>day the service contract went into effect and <code>Start Date</code> may include a renewal date).</p> <p>The currency for all amount fields in the service contract. Available only for organizations that use multiple currencies.</p> <p>You can't change the currency on a service contract that has contract line items.</p>
Description	Description of the service contract. Up to 32 KB of data are allowed in this field.
Discount	Weighted average of all contract line item discounts on the service contract. Can be any positive number up to 100. (Read only)
End Date	The last day the service contract is in effect.
Grand Total	Total price of the service contract plus shipping and taxes. (Read only)
Last Modified By	User who most recently changed the service contract. (Read only)
Line Items	Number of contract line items (products) on the service contract.
Service Contract Owner	Assigned owner of the service contract.
Shipping and Handling	Total shipping and handling costs for the service contract.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed in this field.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Shipping State	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed in this field.
Shipping Zip	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed in this field.
Special Terms	Any terms that you have specifically agreed to and want to track in the service contract.
Start Date	The first day the service contract is in effect.

Field	Description
Status	<p>The status of the service contract.</p> <p>Status is determined by your organization's current system date and the service contract's <code>Start Date</code> and <code>End Date</code>. The status is:</p> <ul style="list-style-type: none"> <li>• Active if the system date is greater than or equal to the <code>Start Date</code> and less than or equal to the <code>End Date</code>.</li> <li>• Expired if the system date is greater than the <code>End Date</code>.</li> <li>• Inactive if the system date is less than the <code>Start Date</code>.</li> </ul>
Status Icon	<p>Represents the service contract's status by displaying one of the following icons:</p> <ul style="list-style-type: none"> <li>•  Active</li> <li>•  Expired</li> <li>•  Inactive</li> </ul>
Subtotal	Total of the service contract line items (products) before discounts, taxes, and shipping are applied. (Read only)
Tax	Total taxes for the service contract.
Term (months)	Number of months that the service contract is in effect.
Total Price	Total of the contract line items (products) after discounts and before taxes and shipping. (Read only)

### 3. Click **Save**.



**Tip:** Click **Clone** to quickly create a new service contract from the existing one. This helps you create multiple service contracts for a customer.

#### SEE ALSO:

[Searching for Service Contracts](#)

## Deleting Service Contracts

To delete a service contract, click **Del** next to the service contract on the service contract list page, or click **Delete** on the service contract detail page.

Deleting a service contract moves it to the Recycle Bin. Any notes, attachments, activities, or contract line items associated with the service contract are also deleted. If you undelete the service contract, any associated items are undeleted.

### Note:

- The **Del** link and **Delete** button only display for users with the “Delete” permission on service contracts.
- You can't delete service contracts with active or expired entitlements.

SEE ALSO:

[Searching for Service Contracts](#)

## Sharing Service Contracts

Your administrator sets the default sharing model for your organization. You can extend sharing to more users than the default set by your administrator. However, you can't make the sharing model more restrictive than the default.

To view and manage sharing details, click **Sharing** on a service contract's detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the service contract. On this page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- Click **Add** to grant access to the record for other users, groups, roles, or territories.

 **Note:** Users must have the “Read” permission on service contracts for you to share service contracts with them.

- Click **Expand List** to view all users that have access to the record.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To delete service contracts:

- “Delete” on service contracts

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view service contracts:

- “Read” on service contracts

## Using the Service Contracts Related List on Accounts or Contacts

The Service Contracts related list displays a list of service contracts that apply to accounts or contacts. Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

Administrators determine the Service Contracts related list's availability and content. The following options and information display by default:

### New Service Contract

Click this button to create a new service contract for an account or contact.

### Action

The actions you can perform on the service contract:

- Click **Edit** to update a service contract.
- Click **Del** to delete a service contract.

### Contract Number

Automatically-generated number identifying the service contract.

### Start Date

The first day the service contract is in effect.

### End Date

The last day the service contract is in effect.

### Status

The status of the service contract.

### SEE ALSO:

[Deleting Service Contracts](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view service contracts on accounts:

- "Read" on accounts

To view service contracts on contacts:

- "Read" on contacts

To create service contracts:

- "Create" on service contracts

To change service contracts:

- "Edit" on service contracts

## Service Contracts Home

Clicking on the Service Contracts tab displays the service contracts home page.

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- If your administrator has set up the console to include service contracts, click the Console tab to find, view, and edit service contracts and their associated records on one screen. See [Displaying the Agent Console](#) on page 220.
- In the **Recent Service Contracts** section, select an item from the drop-down list to display a brief list of the top service contracts matching that criteria. From the list, you can click the name of any service contract to go to it. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the Service Contracts Tab search layout defined by your administrator and by field-level security settings. The Recent Service Contract choices are:

Recent Service Contract Choice	Description
<b>Recently Viewed</b>	The last ten or twenty-five service contracts you viewed, with the most recently viewed service contract listed first. This list is derived from your recent items and includes records owned by you and other users.

- In the **Recent Service Contracts** section, click **New** to create a new service contract.
- In the **Reports** section, click **Go to Reports** to create customized reports that include service contracts.
- In the **Tools** section, click **Transfer Service Contracts** to transfer multiple service contracts from one user to another.

SEE ALSO:

- [Displaying and Editing Service Contracts](#)
- [Creating Service Contracts](#)
- [Deleting Service Contracts](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view the Service Contracts tab:

- "Read" on service contracts

To view service contracts:

- "Read" on service contracts

To create service contracts:

- "Create" on service contracts

## Service Contract History

The Service Contract History related list tracks the changes on a service contract. Any time a user modifies any of the standard or custom fields, a new entry is added to the related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related list itself aren't tracked.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view service contracts:

- "Read" on service contracts

## Service Contract Fields

Here's a service contract's fields. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Account Name	The name of the account that purchased or owns the service contract.
Activation Date	The initial day the service contract went into effect (whereas <code>Start Date</code> may include a renewal date).
Approval Status	An approval process status field.
Billing City	City portion of billing address. Up to 40 characters are allowed in this field.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing State	State or province portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing Zip	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.
Contact Name	Name of the contact associated with the service contract. Select from the drop-down list.

### EDITIONS

Available in: Salesforce Classic

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

Field	Description
Contract Name	Name of the service contract.
Contract Number	Automatically-generated number identifying the service contract. (Read only)
Created By	User who created the service contract. (Read only)
Created Date	The date the service contract was created (whereas <code>Activation Date</code> is the initial day the service contract went into effect and <code>Start Date</code> may include a renewal date).
Currency	The currency for all amount fields in the service contract. Available only for organizations that use multiple currencies. You can't change the currency on a service contract that has contract line items.
Description	Description of the service contract. Up to 32 KB of data are allowed in this field.
Discount	Weighted average of all contract line item discounts on the service contract. Can be any positive number up to 100. (Read only)
End Date	The last day the service contract is in effect.
Grand Total	Total price of the service contract plus shipping and taxes. (Read only)
Last Modified By	User who most recently changed the service contract. (Read only)
Line Items	Number of contract line items (products) on the service contract.
Service Contract Owner	Assigned owner of the service contract.
Shipping and Handling	Total shipping and handling costs for the service contract.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed in this field.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Shipping State	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed in this field.
Shipping Zip	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed in this field.
Special Terms	Any terms that you have specifically agreed to and want to track in the service contract.

Field	Description
Start Date	The first day the service contract is in effect.
Status	<p>The status of the service contract.</p> <p>Status is determined by your organization's current system date and the service contract's Start Date and End Date. The status is:</p> <ul style="list-style-type: none"> <li>• Active if the system date is greater than or equal to the Start Date and less than or equal to the End Date.</li> <li>• Expired if the system date is greater than the End Date.</li> <li>• Inactive if the system date is less than the Start Date.</li> </ul>
Status Icon	<p>Represents the service contract's status by displaying one of the following icons:</p> <ul style="list-style-type: none"> <li>•  Active</li> <li>•  Expired</li> <li>•  Inactive</li> </ul>
Subtotal	Total of the service contract line items (products) before discounts, taxes, and shipping are applied. (Read only)
Tax	Total taxes for the service contract.
Term (months)	Number of months that the service contract is in effect.
Total Price	Total of the contract line items (products) after discounts and before taxes and shipping. (Read only)

## SEE ALSO:

[Contract Line Item Fields](#)

# Contract Line Items

## Displaying and Editing Contract Line Items

### Displaying Contract Line Items

To view a contract line item's details, click a service contract on the Service Contracts tab, list pages, or the Service Contracts related list on:

- Accounts
- Contacts

The Contract Line Items related list shows all the contract line items associated with a service contract.

Your administrator determines if contract line items display on service contracts.

### Editing Contract Line Items

To update a contract line item, click **Edit**, change the fields, and click **Save**.

### Contract Line Items Related Lists

The lower portion of a contract line item displays information related to it, including entitlements, history, activities, notes, and attachments.

You can click:

- Items to display their details
- **Show [number] more** to increase the number of items in the list
- **Go to list** to display a page with the entire list.

### Sharing

You can't share contract line items. Sharing for contract line items is inherited from [service contract sharing](#). For example, users with the "Read" permission on service contracts inherit the "Read" permission on contract line items.

### Printing Contract Line Items

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

### SEE ALSO:

[Contract Line Item Fields](#)

[Adding Contract Line Items](#)

[Searching for Contract Line Items](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view contract line items:

- "Read" on contract line items

To change contract line items:

- "Edit" on contract line items

## Searching for Contract Line Items

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

 **Note:** You *can't* create contract line item list views to find contract line items that match specific criteria.

## Adding Contract Line Items

Contract line items are specific products covered by a service contract.

To add contract line items to a service contract:

1. Click **Add Line Item** in the Contract Line Items related list.
2. Select a price book if prompted. If only the standard price book is activated, it's automatically assigned to the service contract.
3. Select one or more products from the list, or search for a product and then click the product name. In Lightning Experience, your search term should match the beginning of the product name.
4. Enter the attributes for each product. Your administrator may have customized this page to include fields specific to your business.
5. Enter the `Sales Price` for the product. The Sales Price defaults to the List Price specified in the price book assigned to the opportunity. Depending on your user permissions, you may be able to override this value. You might want to give a discount, for example.
6. Enter the number of products at this price in the `Quantity` box.
7. Click **Save**.

SEE ALSO:

[Displaying and Editing Service Contracts](#)  
[Searching for Contract Line Items](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view contract line items:

- "Read" on contract line items

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add contract line items to service contracts:

- "Edit" on service contracts

AND

"Create" on contract line items and "Read" on products and price books

## Deleting Contract Line Items

To delete a contract line item, click **Del** next to the contract line item on the service contract list page, or click **Delete** on the contract line item detail page.

Deleting a contract line item moves it to the Recycle Bin. Any notes, attachments, or activities associated with the contract line item are also deleted. If you undelete the contract line item, any associated items are undeleted.

 **Note:** The **Del** link and **Delete** button only display for users with the “Delete” permission on service contracts.

SEE ALSO:

[Searching for Contract Line Items](#)

### EDITIONS

Available in: **Salesforce Classic**

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

### USER PERMISSIONS

To delete contract line items:

- “Delete” on contract line items

## Using the Contract Line Items Related List

The Contract Line Items related list displays a list of products covered by a service contract. Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

Administrators determine the Contract Line Item related list's availability and contents. The following options and information display by default:

### Add Line Item

Click this button to add a contract line item (product) to the service contract.

### Action

The actions you can perform on the contract line item:

- Click **Edit** to change the contract line item.
- Click **Del** to remove the contract line item.

### Line Item Number

Automatically-generated number that identifies the contract line item.

### Product Name

The product's name. Click to view the product's details.

### Start Date

The first day the service contract is in effect.

### End Date

The last day the service contract is in effect.

### Status

The status of the service contract.

### Asset Name

Name of the asset associated with the contract line item.

Products represent the items your company sells whereas assets represent the specific products your customers have purchased.

### Quantity

Number of units of the contract line item (product) included in the service contract.

### Sales Price

Price to use for the contract line item (product).

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view contract line items:

- "Read" on service contracts

AND

"Read" on contract line items

To add contract line items:

- "Edit" on service contracts

AND

"Create" on contract line items and "Read" on products and price books

To change contract line items:

- "Edit" on contract line items

## Contract Line Item History

The Contract Line Item History related list tracks the changes on a contract line item. Any time a user modifies any of the standard or custom fields, a new entry is added to the related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related list itself aren't tracked. To set which fields are tracked, from the object management settings for contract line items, go to the fields section, and then click **Set History Tracking**.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view contract line items:

- "Read" on contract line items

To set up which fields are tracked:

- "Customize Application"

## Contract Line Item Fields

Here's a contract line item's fields. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Asset Name	Name of the asset associated with the contract line item.  Products represent the items your company sells whereas assets represent the specific products your customers have purchased.
Created By	User who created the contract line item. (Read only)
Created Date	The date the contract line item was created.
Description	Description of the contract line item. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.
Discount	Discount you apply to the contact line item. You can enter a number with or without the percent symbol and you can use up to two decimal places.
End Date	The last day the contract line item is in effect.
Last Modified By	User who most recently changed the contract line item. (Read only)

### EDITIONS

Available in: Salesforce Classic

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

Field	Description
Line Item Number	Automatically-generated number that identifies the contract line item. (Read only)
List Price	Price of the contract line item (product) within the price book including currency. (Read only)
Product	The name of the contract line item (product) as listed in the price book.
Quantity	Number of units of the contract line item (product) included in the service contract. Value must be one or greater.
Sales Price	Price to use for the contract line item. Initially, the sale price for a contract line item (product) added to an opportunity or quote is the contract line item's list price from the price book, but you can change it here.
Service Contract	Name of the service contract associated with the contract line item.
Start Date	Start date of the contract line item.
Status	The status of the contract line item. Status is determined by your organization's current system date and the contract line item's <code>Start Date</code> and <code>End Date</code> . The status is: <ul style="list-style-type: none"> <li>• Active if the system date is greater than or equal to the <code>Start Date</code> and less than or equal to the <code>End Date</code>.</li> <li>• Expired if the system date is greater than the <code>End Date</code>.</li> <li>• Inactive if the system date is less than the <code>Start Date</code>.</li> </ul>
Status Icon	Represents the contract line item's status by displaying one of the following icons: <ul style="list-style-type: none"> <li>•  Active</li> <li>•  Expired</li> <li>•  Inactive</li> </ul>
Subtotal	Contract line item's sales price multiplied by the quantity.
Total Price	Contract line item's sales price multiplied by the quantity minus the discount.

# Accessing Knowledge

## Solutions

### Solutions Overview

A solution is a detailed description of a customer issue and the resolution of that issue. Solution managers, administrators, and users with the appropriate permissions can create, review, and categorize solutions. They can also publish solutions to the Self-Service portal and make solutions public.

The Solutions tab displays a home page that lets you quickly locate and manage solutions. If your organization uses solution categories, you can browse for and find solutions by category. You can also sort and filter solutions using standard and custom list views.

Administrators, and users with the “Import Solutions” permission, can import solutions.

 **Note:** By default, solutions are created and displayed in text format. Administrators can enable HTML solutions so that all solutions are displayed in HTML format and created using an HTML editor.

#### SEE ALSO:

[Solutions Home](#)

[Tips on Writing Solutions](#)

[Tip sheet: Tips & Hints for Solutions](#)

[Administrator setup guide: Solutions Implementation Guide](#)

### Searching for Solutions

You can find solutions by:

- Searching from the Cases Tab
- Searching from the Solutions Tab
- Browsing for Solutions
- Searching Using Global Search
- Create Custom List Views in Salesforce Classic

When you search for solutions, all standard text fields on solutions are searched, as well as the following custom field types:

- Auto-number
- Text
- Text area
- Long text area
- Email
- Phone
- Any field set as an external ID

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

#### USER PERMISSIONS

To view solutions:

- “Read” on solutions

Be aware of these behaviors in solution searches:

- Solution Search returns solutions that include all or any of your keywords. For example, searching for *data loader* may return results with just *data*, just *loader*, or both keywords in any order. Items that include more of your keywords are listed higher in results, and items that contain your keywords as a phrase or near each other are also listed higher.
  - Solution Search can stem—or find variants of your search terms. For example, searching for *creating* finds solutions containing *create*, *created*, and *creating*.
-  **Note:** This behavior applies only to the type of word you search for: a search for a noun matches variants of the noun form, a search for a verb matches variants of the verb form, and so on.
- You can use search wildcards and operators to improve your Solution Search results.
  - If any search terms match words in a solution title, the solution is boosted in the search results.
  - The numbers displayed in parentheses and brackets alongside search results indicate the number of matching solutions found. For example, if you search for *Truck* and *Truck (35)* displays, then your organization has 35 solutions with the term *Truck*.

## Searching from the Cases Tab

1. On a case detail page in the Solutions related list, enter keywords related to a possible solution in the search box. You can use search wildcards and operators in your query.
2. If your organization uses categories, select a category in which to search.
3. Click **Find Solution**. The search returns a list of relevant solutions.
  - Click column headings to sort the results in ascending or descending order.
    - Sorting applies across all search results for a particular object, including those on subsequent pages.
    - You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.
  - If multilingual solutions is enabled for your organization, search results return solutions in all languages that have matching keywords. However, search results across all languages might not be reliable because terms searched from one language to another are processed differently.
  - If solution summaries and inline category breadcrumbs are enabled for your organization, search results display up to 150 characters of the solution details and up to 150 characters of the category trail to which the solution belongs.
  - Note that if HTML Solutions is enabled, all tags and images are removed from solution details.
  - If suggested solutions is enabled, click **View Suggested Solutions** to view relevant solutions using a formula that automatically scores the relevancy of each solution to the particular case via word frequency, word proximity, case similarity, and related solutions.
4. If search results filters are enabled for your organization, you can filter the search results. Click the **Show Filters** link in the appropriate results related list, enter the filter criteria, and click **Apply Filters**.

## Searching from the Solutions Tab

1. On the Solutions tab, enter keywords related to a possible solution in the search box at the top of the page. You can use search wildcards and operators in your query.
2. If your organization uses categories, select a category in which to search.
3. Click **Find Solution**. The search returns a list of matching records.
 

Click column headings to sort the results in ascending or descending order.

 **Note:** Sorting applies across all search results for a particular object, including those on subsequent pages. You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.

If multilingual solutions is enabled for your organization, search results return solutions in all languages that have matching keywords. However, search results across all languages might not be reliable because terms searched from one language to another are processed differently. If solution summaries and inline category breadcrumbs are enabled for your organization, search results display up to 150 characters of the solution details and up to 150 characters of the category trail to which the solution belongs. Note that if HTML Solutions is enabled, all tags and images are removed from solution details.

4. If search results filters are enabled for your organization, you can filter the search results. Click the **Show Filters** link in the appropriate results related list, enter the filter criteria, and click **Apply Filters**.
5. From the list, select a record to jump directly to that record. If you do not find a matching record, browse for a relevant solution using categories.

The fields you see in search results are determined by the search layout defined by your administrator and by your field-level security settings (available in Enterprise, Unlimited, Performance, and Developer Editions only).

## Browsing for Solutions

1. In the Browse Solutions section of the Solutions tab, click a solution category to view a list of solutions in that category and its subcategories.
2. Optionally, use the drop-down list to sort the solutions by category, most commonly used, or recently updated.
3. Select a record from the results to jump directly to that record.

## Searching Using Global Search

1. Enter your search terms in the header search box.  
You can use search wildcards and operators in your query.
2. Select **Search Options...** from the drop-down and select `Solutions` to narrow your search results.
3. Click **Search**.

SEE ALSO:

[Solving Cases](#)

## Displaying and Selecting Solutions

### USER PERMISSIONS

To view solutions:	"Read" on solutions
To attach a solution to a case:	"Read" on solutions and cases AND "Edit" on cases
To change unpublished solutions:	"Edit" on solutions
To delete unpublished solutions:	"Delete" on solutions

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

To change published solutions:	“Manage Published Solutions”
To delete published solutions:	“Manage Published Solutions”

### Displaying Solutions

When you have located a solution, either by searching from a case or from the solutions home or list pages, click the solution title to display detailed information. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record’s detail page.

### Viewing Solution Updates and Comments (Chatter)

Display a Chatter feed of updates, comments, and posts about the solution.

### Selecting Solutions

To attach the solution to your case, click **Select** from the solution detail page or the search results list. The solution is automatically added to the case. The **Select** option is available only if you searched for a solution from within a case, or you searched for solutions to add to your Self-Service portal Home page.

### Editing and Deleting Unpublished Solutions

Users with the “Edit” permission on solutions can update unpublished solutions by clicking **Edit**, changing the necessary fields, and then clicking **Save**. To delete an unpublished solution, a user with the “Delete” permission on solutions can click the **Delete** button.



**Note:** If HTML Solutions is enabled for your organization, and you open a text solution with the HTML editor and save it, the solution will become an HTML solution.

### Editing and Deleting Published Solutions

The ability to edit and delete published solutions is restricted to users who have the “Managed Published Solutions” permission, such as solution managers and administrators.



**Note:** Translated solutions inherit the record type of the master solution from which they are translated. You cannot change the record type of translated solutions.

### Solution Related Lists

Below the solution details is information related to the solution, including a history of changes to the solution, open and closed activities, attachments, related cases, translated solutions, and the categories to which the solution belongs. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data.



**Note:** The size limit for a file attached to a solution is 5 MB. You cannot upload solution attachments with the following file extensions: htm, html, htt, htx, mhtm, mhtml, shtm, shtml, acgi.

Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

### Printing Solutions

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.



**Note:** If HTML solutions is enabled for your organization, any HTML formatting applied in your solution details will appear in the Printable View.

To return to the last list page you viewed, click **Back to list** at the top of the solution detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

SEE ALSO:

- [Solution History](#)
- [Solution Fields](#)
- [Creating Solutions](#)
- [Categorizing Solutions](#)

## Viewing Solution Lists

The Solutions list page displays a list of solutions in your current view. To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.

- Click a solution title to view the detail. Click **Edit** or **Del** to [change the solution or move it to the Recycle Bin](#).
- If Chatter is enabled, click  or  to follow or stop following a solution in your Chatter feed.
- Click **New Solution** or select **Solution** from the Create New drop-down list in the sidebar to [create a solution](#).

SEE ALSO:

- [Solutions Overview](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view solution lists:

- "Read" on solutions

To create solutions:

- "Create" on solutions

To change solutions:

- "Edit" on solutions

To delete solutions:

- "Delete" on solutions

## Creating Solutions

You can create a new solution in the following ways:

- Create a new solution from the sidebar or Solutions tab:

1. Select **Solution** from the Create New drop-down list in the sidebar, or click **New** next to **Recent Solutions** on the solutions home page.

If multilingual solutions is enabled for your organization, you can create a translated solution by clicking **New** on the Translated Solutions related list of the master solution you want to translate. Translated solutions inherit the record type of the master solution from which they are translated. You cannot change the record type of translated solutions.

2. If multilingual solutions is enabled for your organization, select the language for the solution from the `Language` picklist.

The languages available are the languages supported by Salesforce. The `Language` picklist excludes languages already used in the master solution or in other translated solutions associated with the master solution.

3. Enter the solution title, details, and any other information.



**Tip:** In solution searches, if any search terms match words in a solution title, the solution is boosted in the search results. Thus, it's a good idea to write a solution title with relevant words that users are likely to use in searches.

If HTML Solutions is enabled for your organization, you can enter solution details in an HTML editor. The HTML editor allows you to use a toolbar to insert images and format the text and paragraphs in your solution.

4. If Spell Checker is enabled for your organization, click **Check Spelling** to spell-check the solution. Spell Checker only checks the details of a solution, not the title.

For organizations with multilingual solutions, spelling is checked in the language you selected from the `Language` picklist. Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

5. Click **Save**.



**Note:** Images in HTML solution details will not show up in list views and reports.

- Create a new solution while closing a case:

1. Choose **Close Case** on a case detail page, or click **Save & Close** while editing a case.
2. Enter the title and details under **Solution Information**, and check `Submit to knowledge base` to submit the solution for review by your solution managers.
3. Click **Save**.

SEE ALSO:

[Solution Fields](#)

[Reviewing Solutions](#)

[Tips on Writing Solutions](#)

[Categorizing Solutions](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To create solutions:

- "Create" on solutions

## Tips on Writing Solutions

To assist users in solving their cases, it is important to write good solutions. Review the guidelines below, and also see the [Tips & Hints for Solutions](#) document.

### Reusable

- Include all facts and symptoms of the problem.
- Include any necessary analysis or troubleshooting ideas.
- Include a concise, accurate description of the cause and resolution of the problem.
- Include only one cause and one resolution per solution. If there are a number of steps to the resolution, number each step and put it on a separate line.
- Make sure the text is clear and in the language of the intended audience—both customer support users and your customers.
- Make sure the title properly describes the problem or question.
- Associate as many relevant solutions to a particular case as possible to increase the usefulness of the suggested solutions feature. Suggested solutions are found using a formula that automatically scores the relevancy of each solution to a particular case via the number of times the solution is related to similar cases.



**Note:** Use a consistent format to ensure that all solutions are reusable. You can determine the best format for your organization, but make sure each solution contains a title, the symptoms of the problem, the cause of the problem, and the resolution to the problem.

### Findable

- Make sure the solution can be found by multiple troubleshooting paths and by different people who will describe problems in different ways.
- Make sure the solution is unique and can exist as a discrete piece of knowledge.
- Make sure the solution is meaningful to your organization and is worth sharing with your customers.
- Make sure the solution includes words that customers use so that when they log their own cases via the Self-Service Portal or the Customer Portal, the suggested solutions feature can return useful results based on word frequency. For example, if customers use the word “hub” for “router,” include “hub” in the solution to increase the likelihood of it being returned in the results of suggested solutions.



**Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

### Technically Accurate

- Make sure the solution is accurate and up-to-date.
- Make sure the level of technical detail is appropriate for the intended audience.

## Sample Solution

This example provides a clear solution to a specific problem.

```
How do I change an account's billing information?
```

```
Problem-Users aren't sure how to change an account's billing information, such as the credit card number or payment type.
```

```
Solution-Change billing information in the active contract on the account.
```

- ```
1. Open an account by clicking its name on the Accounts home page or an Accounts related list.  
2. Scroll to the Contracts related list and click Edit next to the active contract on the
```

```
account.
3. Enter the correct billing information.
4. Click Save.
```

## SEE ALSO:

[Creating Solutions](#)

## Reviewing Solutions

Solution managers, administrators, and users with the “Edit” permission on solutions can review existing solutions. Solution managers, administrators, and users with the “Manage Published Solutions” can publish solutions.

1. Click **Edit** on the solution detail page.
2. Edit the necessary information, and change the `Status` to Reviewed.
3. Check `Visible in Self-Service Portal` to make the solution available in your organization’s customer Self-Service portal and Salesforce Customer Portal.

 **Note:** The `Status` picklist field on a solution does not need to be set to Reviewed for a solution to be visible in the Customer Portal; a solution is visible in the Customer Portal if the `Visible in Self-Service Portal` checkbox is selected on a solution.

4. Optionally, check `Visible in Public Knowledge Base` to also make the solution available to users accessing public solutions.

This field only applies to solutions, not articles in the [public knowledge base](#).

5. Click **Save**.

For organizations with multilingual solutions, if you modify a master solution that has translated solutions, the Translated Solutions Status page displays. From there, you can adjust the statuses of translated solutions and notify users to update those translations.

## SEE ALSO:

[Solution Fields](#)

[Creating Solutions](#)

[Categorizing Solutions](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To review solutions:

- “Edit” on solutions

To publish solutions:

- “Manage Published Solutions”

## Deleting Solutions

To delete a solution, click **Del** next to the solution on the solutions list page, or click **Delete** on the solutions detail page. The **Del** link is displayed only for solution managers, administrators, and users with the “Manage Published Solutions” or “Delete” permission on solutions.

When you delete a solution, all related history and attachments are also deleted. The solution is moved to the Recycle Bin. Associated cases are not deleted with the solution, but the case associations are removed and are not restored if you later undelete the solution.

For organizations with multilingual solutions enabled:

- Deleting a master solution does not delete the translated solutions associated with it. Instead, each translated solution becomes a master solution.
- Deleting a translated solution removes the association with its master solution.
- Undeleting a master or translated solution from the Recycle Bin does not restore its associations with other master or translated solutions. You can manually restore the associations by modifying the `Master Solution` lookup field on the edit page of translated solutions.
- After deleting a translated solution, you can create a new translated solution in the same language. However, you will not be able to undelete the original translated solution from the Recycle Bin until you delete the second translated solution.

SEE ALSO:

[Solutions Overview](#)

## Categorizing Solutions

Use solution categories to group similar solutions together. Each solution can belong to more than one category. Once your solutions are categorized, you can browse for and find solutions by category from the Solutions tab or when solving a case. Customers can also browse published solutions by category in public solutions, the Self-Service portal, and the Customer Portal.

Administrators, and users with the “Manage Categories” permission, can categorize solutions prior to enabling solution categories for the entire organization. Once solution category browsing is enabled, all users with the appropriate permissions can categorize solutions.

If multilingual solutions is enabled for your organization, translated solutions inherit solution categories from their master solutions. The categories on a translated solution are synchronized with the categories on the master solution. To modify a translated solution's categories, you have to modify the categories of its master solution.

1. View the solution you want to categorize.
2. Click **Select Categories** in the Solution Categories related list.  
This related list is not visible unless your administrator has defined and enabled categories.
3. In the solution category hierarchy, click **Select** to add a category to the solution. Repeat until you have added all applicable categories.

We recommend that you limit the number of categories to which a solution belongs. If you put solutions into only the most relevant categories, they will be easier for users and customers to find.

If necessary, click **Deselect** to remove a category from the solution.

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To delete unpublished solutions:

- “Delete” on solutions

To delete published solutions:

- “Manage Published Solutions”

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To categorize solutions:

- “Edit” on solutions

#### 4. Click **Save**.

To later remove a category from a solution, click **Del** in the Solution Categories related list on the solution detail page.



**Note:** You can create a custom report on solution categories. However, solution category information is not available in list views.

SEE ALSO:

[Searching for Solutions](#)

[Solving Cases](#)

## Setting Multilingual Solution Statuses

After you modify a master solution, you can adjust the statuses of each translated solution associated with it and notify users to update those translations, if necessary:

1. Choose a status for the translated solution from the `Status` picklist. For example, Draft, Reviewed, or Duplicate. The picklist values available for you to choose from are set by your administrator.
2. Select the `Out of Date` checkbox to indicate that the master solution has been updated and that the translated solution may need translating. The translated solution will be marked `Out of Date` on the Translated Solution related list of the master solution.
3. Select the `Send Notification` checkbox if you want the last active user who created or modified the solution to receive an email notifying them that the master solution has been updated and that the translated solution may need translating.

The user displayed in the `Notification Recipient` column will receive the email. Email notices are system-generated and cannot be modified. The email notification is in the language of the notification recipient.

#### 4. Click **Save**.

SEE ALSO:

[Solution Fields](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To change the status of translated solutions:

- "Edit" on solutions

## Solutions Home

Clicking on the Solutions tab displays the solutions home page.

- Under **Find Solutions**, enter keywords to search for a solution. If your organization uses categories, optionally select a category in which to search. If multilingual solutions is enabled for your organization, search results return solutions in all languages that have matching keywords. However, search results across all languages might not be reliable because terms searched from one language to another are processed differently.
- In the **Browse Solutions** section, click a category name to view a list of solutions in that category and its subcategories.
- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- In the **Recent Solutions** section, select an item from the drop-down list to display a brief list of the top solutions matching that criteria. From the list, you can click any solution name to go directly to the solution detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the “Solutions Tab” search layout defined by your administrator and by your field-level security settings (available in Enterprise, Unlimited, Performance, and Developer Editions only). The Recent Solutions choices are:

| Recent Solutions Choice | Description                                                                                                                                                                                           |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Recently Viewed</b>  | The last ten or twenty-five solutions you viewed, with the most recently viewed solution listed first. This list is derived from your recent items and includes records owned by you and other users. |

- In the **Recent Solutions** section, click **New** to create a solution.
- Under **Reports**, click any report name to display that report. The Solution List report allows you to report on any solution field.

SEE ALSO:

[Solutions Overview](#)

[Creating Solutions](#)

[Searching for Solutions](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### USER PERMISSIONS

To view Solutions tab:

- “Read” on solutions

To view solutions:

- “Read” on solutions

To create solutions:

- “Create” on solutions

## Solution History

The Solution History related list of a solution detail page tracks changes to the solution. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the solution, a new entry is added to the Solution History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the solution are not tracked in the solution history.

SEE ALSO:

[Solutions Overview](#)

[Solution Fields](#)

## Solution Fields

A solution has the following fields, listed in alphabetical order.

| Field                   | Description                                                                                                                                                                         |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Created By              | User who created the solution including creation date and time. (Read only)                                                                                                         |
| Language                | The language in which a solution is written.<br>Available for organizations with multilingual solutions enabled.                                                                    |
| Master Solution         | The solution with which a translated solution is associated and from which its title and details are derived.<br>Available for organizations with multilingual solutions enabled.   |
| Master Solution Details | Detailed description of the master solution from which a translated solution's details are derived. (Read only)<br>Available for organizations with multilingual solutions enabled. |
| Master Solution Title   | Title of the master solution from which a translated solution's title is derived. (Read only)<br>Available for organizations with multilingual solutions enabled.                   |
| Modified By             | User who last changed the solution fields, including modification date and time. This does not track changes made to any of the related list items on the solution. (Read only)     |

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

| Field                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Case Detail                 | Link to printable view of the case that was used to create the solution. Displays only if the solution was created when the case was closed. Displays only when editing a solution. (Read only)                                                                                                                                                                                                                                    |
| Out of Date                      | <p>Checkbox that indicates that a translated solution's title and details may need translating to match the title and details of the master solution with which it is associated.</p> <p>Available for organizations with multilingual solutions enabled.</p>                                                                                                                                                                      |
| Public                           | <p> <b>Note:</b> Before Spring '14, this field was called <code>visible in Self-Service Portal</code>.</p> <p>Indicates the solution is available in the Self-Service Portal and Customer Portal.</p> <p>If Communities is enabled in your organization, this field specifies whether a solution is visible to external users in communities.</p> |
| Solution Details                 | <p>Detailed description of the solution. Up to 32 KB of data are allowed.</p> <p>Solution details are either displayed in text or HTML, depending on how your organization is set up.</p> <p>When the HTML solution detail is displayed in list views and search results, only the first 255 characters are displayed. This number includes HTML tags and images that are removed.</p>                                             |
| Solution Number                  | <p>Automatically generated identifying number. (Read only)</p> <p>Administrators can modify the format and numbering for this field.</p>                                                                                                                                                                                                                                                                                           |
| Solution Title                   | Title of the solution describing the customer's problem or question.                                                                                                                                                                                                                                                                                                                                                               |
| Status                           | <p>Status of the solution, for example, Draft, Reviewed. Entry is selected from a picklist of available values, which are set by an administrator.</p> <p>Each picklist value can have up to 40 characters.</p>                                                                                                                                                                                                                    |
| Visible in Public Knowledge Base | <p>Indicates the solution is a public solution.</p> <p>This field only applies to solutions, not articles in the <a href="#">public knowledge base</a>.</p>                                                                                                                                                                                                                                                                        |
| Custom Links                     | Listing of custom links for solutions set up by your administrator.                                                                                                                                                                                                                                                                                                                                                                |

## SEE ALSO:

[Creating Solutions](#)

[Displaying and Selecting Solutions](#)

## Solutions FAQ

- [What is a solution manager?](#)
- [Why are solutions used?](#)
- [What is the difference between a solution and a FAQ?](#)
- [How can I write good solutions?](#)
- [What should I look for when I review solutions?](#)
- [What are the Visible in Self-Service Portal and Visible in Public Knowledge Base checkboxes on a solution?](#)

### EDITIONS

Available in: Salesforce Classic

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### What is a solution manager?

A solution manager can edit, delete, and make solutions visible in the Self-Service Portal and Customer Portal and visible in public solutions. Typically, these individuals are product experts with excellent written communication skills and advanced knowledge in a particular area of your product. To designate one or more users as solution managers, your administrator can assign those users to the Solution Manager profile when creating or editing the users' personal information.

SEE ALSO:

[Solutions FAQ](#)

### Why are solutions used?

Solutions provide a quick means to identify and resolve a customer issue. By capturing customer issues and structuring findable, reusable solutions, your customer support team can leverage existing knowledge to provide answers to issues that have been solved previously, increasing customer satisfaction and your team's productivity.

SEE ALSO:

[Solutions FAQ](#)

### What is the difference between a solution and a FAQ?

A FAQ serves mostly as a useful tip for how the product or service is supposed to work. Solutions answer customer questions when the product or service is not working as expected. Because customers' expectations may not always be accurate, a solution may describe how the product or service is supposed to work (very similar to a FAQ), help troubleshoot a problem, or provide a work-around to a bug or product limitation.

SEE ALSO:

[Solutions FAQ](#)

### How can I write good solutions?

A good solution is reusable, easy to find, and technically accurate. For more information, download [Tips & Hints for Solutions](#).

SEE ALSO:

[Solutions FAQ](#)

## What should I look for when I review solutions?

Solution managers can use these guidelines when reviewing solutions:

1. **Structure:** The solution should include a clear title, the symptom(s), cause, and resolution.
2. **Language:** The solution should be clear and easy to read in the language of the customer.
3. **No Customer-Specific Information:** Solutions should never contain customer-specific information.
4. **Technically Accurate:** The solution should accurately and effectively solve the problem posed by the customer.
5. **Professional:** Check for spelling and correct sentence structure.
6. **Sensitivity:** The solution should not contain any confidential or proprietary information that you wouldn't want a competitor to read.

SEE ALSO:

[Solutions FAQ](#)

## What are the Visible in Self-Service Portal and Visible in Public Knowledge Base checkboxes on a solution?

The `Visible in Self-Service Portal` and `Visible in Public Knowledge Base` checkboxes, when selected, indicate that a solution is available for external use on your organization's Self-Service Portal and Customer Portal and public solutions. Solutions available for external use are regarded as published.

**Visible in Public Knowledge Base** only applies to solutions, not articles in the [public knowledge base](#).

 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

SEE ALSO:

[Solutions FAQ](#)

# Salesforce Knowledge

## Salesforce Knowledge Overview

Salesforce Knowledge is a knowledge base where users can easily create and manage content, known as articles, and quickly find and view the articles they need. After you set up Salesforce Knowledge in your organization, users can write, edit, publish, and archive articles using the Articles Management tab or find and view published articles using the Articles tab. Customers and partners can access articles if Salesforce Knowledge is enabled in the Customer Portal or partner portal. You can also create a public knowledge base so website visitors can view articles.

Salesforce Knowledge provides the following features and tasks to help you efficiently manage your knowledge base and its users:

### Using Article Types

Article types are custom containers for your articles. Every article belongs to a type that determines its content and structure. Administrators define article types by creating custom fields to capture article data, grouping or reorganizing the fields as needed on the layout, and choosing an article-type template. The article-type template determines how the layout appears

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

to viewers of the published article, and administrators can choose unique templates for different audiences and article types. Salesforce provides two standard article-type templates, Tab and Table of Contents, and you can use Visualforce to create custom templates.

### **Categorizing Articles**

Data categories classify articles in Salesforce Knowledge. This classification helps users find articles and allows administrators to control article visibility. After data categories have been set up, [article managers](#) can assign the relevant categories to draft articles. When end users are searching for published articles in any channel—Internal App, Customer, Partner, or Public Knowledge Base—they can use the categories to help locate information. If your organization uses a role hierarchy, access to data categories is determined by the user's role.

### **Managing Articles**

On the Article Management tab, article managers can create new articles as well as find and manage existing articles in any phase of the knowledge life cycle:

1. Create and save a new article.
2. Reassign the article to an editor, translator, reviewer, or any other collaborator as needed. That person can reassign the article as many times as necessary until the content is ready for publication. If an approval process is set up for the article type, you or the person you reassign to submits the article for approval. The article is routed to the appropriate approver or set of approvers, who either approve or reject it.
3. **Publish** the completed draft to one or more channels, depending on the audiences you've configured: the Articles tab in your Salesforce organization, a customer portal, a partner portal, or a public knowledge base. You can schedule the article to be published on a future date.
4. Update the article as needed. When modifying a published article, you can either remove it from publication so that the original is no longer visible to users, or leave the original published and work on a copy until you're ready to replace the original with your update.
5. Archive the article when it is obsolete to remove it from publication. As with publishing an article, you can archive immediately or on a future date.
6. Delete the article as needed, or turn it into a draft and begin a new publishing cycle.

### **Creating Articles**

Authors create articles by selecting an article type, writing content, assigning categories, and choosing one or more channels. Depending on the article type, several fields may be available for different types of data.

### **Supporting Multiple Languages**

With multiple languages for Salesforce Knowledge you can lower support costs by translating articles into the languages your audience prefers. After an administrator selects your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to a Salesforce Knowledge user for Spanish translations.

### **Using Articles to Solve Cases**

Salesforce Knowledge and cases combine to provide a powerful customer support tool. To search the knowledge base directly from a case and attach related articles to the case for convenient reference, add the Articles related list to case page layouts. When closing a case, support agents can easily create a new article to capture important information and help solve future cases more quickly.

### **Searching for Articles**

Finding articles in Salesforce Knowledge is quick and easy. Enter a search term on the Articles tab to initiate a full-text search of the knowledge base and narrow your search by selecting specific article types and categories. When the beta version of search spell correction is enabled, the system searches and retrieves alternate spellings for English search terms. You can filter search results by language, validation status, and category and sort the list view according to several criteria such as highest-rated or most-viewed. On the Article Management tab you can search for a specific article within the chosen list view. The Article Search component allows you to search for articles from the Home tab.

## Rating Articles

Internal app, Customer Portal, and partner portal users can rate articles on a scale of 1 to 5 stars and view the average rating for an article. Average ratings are not static. Every 15 days, if an article has not received a new vote, its average moves up or down according to a half-life calculation. This change ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently used articles. Articles without recent votes trend towards an average rating of 3 stars. The Articles tab also allows users to compare the ratings for different articles and sort the list view according to highest or lowest rated articles.



**Note:** Articles with no votes have the same average rating as articles with 3 stars.

SEE ALSO:

[Salesforce Knowledge Terminology](#)

## Salesforce Knowledge Terminology

The following terms are used when describing Salesforce Knowledge features and functionality.

### Archived Article

Archived articles were published but later removed from public visibility. Article managers can view and manage archived articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Archived Articles**. Archived articles are not visible in the Articles tab (in any channel) or the public knowledge base. Articles can be archived manually or automatically via an expiration date.

### Article

*Articles* capture information about your company's products and services that you want to make available in your knowledge base.

### Article Manager

Salesforce uses the term *article manager* to represent a specific type of user. Article managers can access the Article Management tab to create, edit, assign, publish, archive, and delete articles. Article managers are sometimes referred to as knowledge managers. Article managers require the "Manage Articles" user permission. The Article Management tab is not visible to users without "Manage Articles."

### Article Type

All articles in Salesforce Knowledge are assigned to an *article type*. An article's type determines the type of content it contains, its appearance, and which users can access it. For example, a simple FAQ article type might have two custom fields, `QUESTION` and `ANSWER`, where article managers enter data when creating or updating FAQ articles. A more complex article type may require dozens of fields organized into several sections. Using layouts and templates, administrators can structure the article type in the most effective way for its particular content. User access to article types is controlled by permissions. For each article type, an administrator can grant "Create," "Read," "Edit," or "Delete" permissions to users. For example, the article manager might want to allow internal users to read, create, and edit FAQ article types, but let partner users only read FAQs.

### Article-Type Layout

An *article-type layout* enables administrators to create sections that organize the fields on an article, as well as choose which fields users can view and edit. One layout is available per article type. Administrators modify the layout from the article-type detail page.

### Article-Type Template

An *article-type template* specifies how the sections in the article-type layout are rendered. An article type can have a different template for each of its four channels. For example, if the Customer Portal channel on the FAQ article-type is assigned to the Tab template, the sections in the FAQ's layout appear as tabs when customers view an FAQ article. For the Table of Contents template, the sections

## EDITIONS

Available in: **Salesforce Classic**

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

defined in the layout appear on a single page (with hyperlinks) when the article is viewed. Salesforce provides two standard article-type templates, Tab and Table of Contents. Custom templates can be created with Visualforce.

### Category Group for Articles

In Salesforce Knowledge, a *category group* organizes data categories into a logical hierarchy. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. When creating articles, authors assign the relevant categories to the article. End users searching for articles can search and filter by category.

### Channel

A channel refers to the medium by which an article is available. Salesforce Knowledge offers four channels where you can make articles available.

- Internal App: Salesforce users can access articles in the Articles tab depending on their role visibility.
- Customer: Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
- Partner: Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
- Public Knowledge Base: Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.
- Your own website. Articles can be made available to users through your company website.

### Data Category for Articles

In Salesforce Knowledge, *data categories* are a set of criteria organized hierarchically into category groups. Articles in the knowledge base can be classified according to multiple categories that make it easy for users to find the articles they need. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. Authors assign categories to articles. Administrators can use data categories to control access to articles.

### Draft Article

Draft articles are in-progress articles that have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Draft Articles**. You can filter draft articles by those assigned to you or those assigned to anyone (all draft articles for your organization). Draft articles can be assigned to any user involved in the editorial work.

### Draft Translation

Draft translations are in-progress translations of articles into multiple languages. They have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft translations on the Articles Management tab by clicking the **Translations** tab in the View area and choosing **Draft Translations**. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization). Translations can be assigned to any user who can publish Salesforce Knowledge articles.

### Knowledge Agent

Salesforce uses the term *knowledge agent* to represent a specific type of user. Knowledge agents are article consumers in the internal Salesforce Knowledge app. These users can access the Articles tab to search for and view articles, but they cannot create, edit, or manage articles.

### Published Article

Published articles are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published article, you can archive it or change its status to "draft" on the Article Management

tab. To access published articles on the Articles Management tab, click the **Articles** tab in the View area and choose **Published Articles**.

### Published Translation

Published translations are articles translated into multiple languages that are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published translation, you can archive it or change its status to “draft” on the Article Management tab. To access published translations on the Articles Management tab, click the **Translations** tab in the View area and choose **Published Translations**.

SEE ALSO:

[Salesforce Knowledge Overview](#)

## Searching Articles and External Sources on the Knowledge Tab

### USER PERMISSIONS

|                                                    |                                                                              |
|----------------------------------------------------|------------------------------------------------------------------------------|
| To view articles:                                  | “Read” on the article type                                                   |
| To create articles:                                | “Manage Articles”<br>AND<br>“Read” and “Create” on the article type          |
| To edit draft articles:                            | “Manage Articles”<br>AND<br>“Read” and “Edit” on the article type            |
| To edit published or archived articles:            | “Manage Articles”<br>AND<br>“Create,” “Read,” and “Edit” on the article type |
| To delete a draft, published, or archived article: | “Manage Articles”<br>AND<br>“Read,” “Edit,” and “Delete” on the article type |
| To create and edit external data sources:          | “Customize Application”                                                      |

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Use federated search to search all your resources at once.

To search Salesforce Knowledge and your external data sources:

1. Enter your search terms in the Search box.

You can use search wildcards and operators in your search terms. If your organization has any auto-complete options enabled, you can select from the suggestions.

 **Note:** In the auto-complete drop-down article titles have a paper icon while the keywords have a magnifying glass icon.

2. Click the search icon or press *Enter* on your keyboard.
3. Optionally, select filters to refine your search results.

Depending on the source you are searching, filter by language, data category, article status, article type, and article validation. Click **Reset** to return all filters to their default setting.

- When **All** is selected, you can filter by language and data category, depending on what your organization supports.
  - When **Articles** or **My Draft** is selected you can filter by:
    - Article status: Published, Draft, and Draft Translations
    - Language: Values depend on those supported in your organization
    - Data categories: Values depend on those created in your organization
    - Article type: Values depend on those created in your organization
    - Validation Status: No Filter (all articles), Not Validated (articles that are not validated), Validated (validated articles), and any other values supported in your organization such as in review.
  - When an external source is selected, there are no filters and the general article information displayed is controlled by your external object search layout.
4. For articles, you can sort by:
    - Published Date
    - Best Rating
    - Most Viewed
    - Title: A to Z
    - Title: Z to A
  5. View information by clicking on the article or external source title. Below the title you can find general article information such as: new article indication, article number, article type, validation status, last published date, article view comparison, and article rating comparison.
  6. Use the drop-down by each article to follow or unfollow, [edit](#), [publish](#), and [delete](#) an article, depending on your permissions.

## Searching for Articles

- [Searching for Articles in the Articles Tab](#)
- [Searching for Articles in the Article Management Tab](#)
- [Searching for Articles from Cases](#)
- [Searching for Articles Using Global Search](#)

### Searching for Articles in the Articles Tab

By default the Articles tab displays articles that were created or modified during the last 30 days. To find an article, use the search tools in the sidebar. When the beta version of search spell correction is enabled, the system suggests an alternative search term if it can't find the original search term in the English dictionary. Click the link for the search term you want and you'll see the results for that term.

1. Enter your search terms in the Search box. You can use search wildcards and operators in your search terms.

 **Note:** If you click **Go** without entering a search term or selecting an article type, validation status, or category, your search results contain articles that were created or modified in the last 30 days. An empty search does not return all published articles in the knowledge base.

2. Optionally, select one or more article types that you want to search for.
3. Click **Go**.
4. Optionally, [select filters](#) to refine your search results.

 **Tip:** If your Home tab includes an article search component, you can also search for articles from the Home tab. Enter your search terms in the `Find Articles` field.

### Searching for Articles in the Article Management Tab

On the Article Management tab you can view articles in any phase of the publishing life cycle and then search for a specific article within the chosen list view. The default list view on the Article Management tab contains draft (unpublished) articles that are assigned to you. When the beta version of search spell correction is enabled, the system searches and retrieves alternate spellings for English search terms.

To find an article, use the search tools in the View area.

1. Click the `Articles` tab.
2. Choose **Draft Articles**, **Published Articles**, or **Archived Articles**. You can filter draft articles by those assigned to you or those assign to anyone (all draft articles for your organization).
3. Optionally, enter your search terms in the `Find in View` box. You can use search wildcards and operators in your search terms. `Find in View` is not supported for archived articles. Click **Go**.
4. Click **Go**.
5. Optionally, [select filters](#) to refine your search results.

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#### USER PERMISSIONS

To view published articles in the Articles tab or Articles related list:

- "Read" on the article type

To view draft, published, or archived articles in the Article Management tab:

- "Manage Articles"

AND

"Read" on the article type

## Searching for Translations in the Article Management Tab

On the Article Management tab you can view translations in any phase of the article translation cycle and then search for a specific translation within the chosen list view.

To find an article, use the search tools in the View area:

1. Click **Translations**.
2. Choose **Draft Translations** or **Published Translations**. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization).
3. Optionally, enter your search terms in the **Find in View** box. You can use search wildcards and operators in your search terms. **Find in View** is not supported for archived articles. Click **Go**.
4. Click **Go**.
5. Optionally, [select filters](#) to refine your search results.

## Searching for Articles from Cases

Use the Articles related list on the case detail page to search for [Salesforce Knowledge articles](#) that may help you solve the case. If you find relevant articles, you can attach them to the case, where they are easily accessible for the life of the record or until detached or deleted. If your organization translates articles, you can add a translated version of an article to a case.

If you don't find a solution in the suggested articles, you can [create an article](#) by clicking **New**. When the beta version of search spell correction is enabled, the system searches and retrieves alternate spellings for English search terms.

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.
3. Optionally, [select filters](#) to refine your search results.
4. 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**.

 **Note:** You can't attach or detach an article from the Articles page. Instead, return to the case detail page and attach or detach the article from the Articles related list.

## Searching for Articles Using Global Search

When using global search, you can select **Search Options** from the drop-down and select **Articles** to narrow your search results.

If you're in a multiple language Salesforce Knowledge organization, global search article results are in your default personal language. If your default personal language is not supported by Salesforce Knowledge, your results are in your organization's knowledge base default language.

 **Note:** Global search only returns published articles, not draft or archived articles.

## Using Filters to Narrow Your Results List

After you've retrieved your search results, you can narrow the results list by using filters.

- Use the Article Language filter to search for articles by language within your results.
- If your organization uses categories, you can filter the list view by selecting one or more categories.

**Note:**

- If an article has no categories, it displays only when you choose the `No Filter` option in the category drop-down menu.
  - When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example, if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting “Optical Networks” from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting “Optical Networks” does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.
  - If your organization uses roles, users who are not assigned to a role can only view uncategorized articles.
  - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- If enabled, select a validation status to narrow the search by the article’s state in the publication cycle.

**SEE ALSO:**[Example of Article Search Results](#)[Lemmatization Behavior with Salesforce Knowledge Article Searches](#)[The Articles or Knowledge Tab](#)

## Understanding Article Search Results

How search works for articles depends on your use of search options, search terms, wildcards, and operators.

Salesforce Knowledge article search uses the same custom search algorithms that are available throughout Salesforce, which include mechanisms such as tokenization, lemmatization, and stopword lists, to return relevant search results, with this exception.

### Operators

When you don’t specify an operator in your article search, the search engine will determine the best operator to use.

Many searches use “AND” as the default operator. This means that when you search for multiple terms, all of the terms need to match to generate a result. Matching on all terms tends to produce search results that are more relevant than searches using the “OR” operator, where matches on any of the search query terms appear in the results.

If the search engine doesn’t return any results that match all of the terms, it looks for matches using the “OR” operator. With the “OR” operator, the search engine boosts documents that contain more terms from the search query, so that they appear higher in the results list.

### The Order of Articles in the Results List

Many factors influence the order in which articles appear in the results list. Salesforce evaluates your search terms and your data to move more relevant matches higher in your list of results. Some of these factors include:

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#### USER PERMISSIONS

To view published articles in the Articles tab or Articles related list:

- “Read” on the article type

To view draft, published, or archived articles in the Article Management tab:

- “Manage Articles”

AND

“Read” on the article type

**Frequency**

This algorithm calculates the frequency with which a term appears within each article. The algorithm then weighs them against each other in order to produce the initial set of search results.

**Relevancy**

Articles that are frequently viewed or that are frequently attached to cases appear higher in the results. Article ownership and recent activity also boost an article in the results list.

**Proximity of Terms**

Articles that contain all of the keywords in a search are ranked highest, followed by those with fewer keywords, followed by those with single keyword matches. Terms that are closer together in the matched document, with few or no intervening words, are ranked higher in the list.

**Exact Matches**

Matches on exact keywords are ranked higher than matches on synonyms or lemmatized terms.

**Title Field**

If any search terms match words in an article title, the article is boosted in the search results.

**Token Sequence**

If the search term is broken up into multiple tokens because it contains both letters and numbers, the system boosts matches based on the same sequence of tokens. That way, exact matches are ranked higher than matches on the tokens with other tokens in between.

**SEE ALSO:**

[Searching for Articles](#)

## Example of Article Search Results

When you [search for articles](#), you can narrow your search results by selecting categories. The following table is an in-depth example of how filtering by categories works. This example uses the sample category groups [Products](#) and [Geography](#) and three sample articles. Assume that the user performing the search has access to all categories.

**Table 1: Example: How Filtering by Categories Narrows Article Search Results**

| If you select these category filters... | An article assigned to All Countries AND Laptop is...                                                                                                             | An article assigned to Canada AND Computers is...                                                                                                                                                                                                                                                               | An article assigned to Europe only is...                                                                                                                                                                                                                                                                            |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| All Countries<br>AND<br>All Products    | FOUND. Reasons: <ul style="list-style-type: none"> <li>All Countries is an exact match.</li> <li>Selecting All Products automatically includes Laptop.</li> </ul> | FOUND. Reasons: <ul style="list-style-type: none"> <li>Canada is a child of All Countries.</li> <li>Computers is a child of All Products.</li> </ul>                                                                                                                                                            | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Europe is a child of All Countries, but all filter criteria must be met.</li> <li>The article is not assigned to a Products category. To retrieve this article, choose No Filter from the category drop-down menu.</li> </ul>                            |
| Asia<br>AND<br>Computers                | FOUND. Reasons: <ul style="list-style-type: none"> <li>All Countries is the parent of Asia.</li> <li>Laptop is a child of Computers.</li> </ul>                   | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Canada and Asia are not in the same parent/child hierarchy (that is, they are in different branches of the category hierarchy).</li> <li>Computers is an exact match, but all filter criteria must be met before an article is displayed.</li> </ul> | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Europe and Asia are siblings rather than members of the same parent/child hierarchy.</li> <li>If an article is not assigned to a category, "No Filter" must be selected in the corresponding category drop-down menu to retrieve the article.</li> </ul> |
| France<br>AND<br>Enterprise Electronics | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Laptop is not in a parent/child relationship with</li> </ul>                                           | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Canada and France are not members of the same parent/child</li> </ul>                                                                                                                                                                                | NOT FOUND. Reasons: <ul style="list-style-type: none"> <li>Europe is the parent of France but all filter criteria must be met.</li> </ul>                                                                                                                                                                           |

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### USER PERMISSIONS

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- "Read" on the article type

To view draft, published, or archived articles in the Article Management tab:

- "Manage Articles"

AND

"Read" on the article type

| If you select these category filters... | An article assigned to All Countries AND Laptop is...                                                                                                                                                                                                      | An article assigned to Canada AND Computers is...                                                                                                                                                                                         | An article assigned to Europe only is...                                                                                                                                                                                                                                                                                 |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                         | Enterprise Electronics.<br><ul style="list-style-type: none"> <li>All Countries is a parent of France but all filter criteria must be met.</li> </ul>                                                                                                      | hierarchy (they are cousins).<br><ul style="list-style-type: none"> <li>Computers and Enterprise Electronics are not members of the same parent/child hierarchy (they are siblings).</li> </ul>                                           | <ul style="list-style-type: none"> <li>If an article is not assigned to a category, "No Filter" must be selected in the corresponding category drop-down menu to retrieve the article.</li> </ul>                                                                                                                        |
| Europe<br>(No other filter)             | NOT FOUND. Reasons:<br><ul style="list-style-type: none"> <li>The No Filter criteria on Products only retrieves an article assigned to No Categories.</li> <li>All Countries is the grandparent of Europe, but all filter criteria must be met.</li> </ul> | NOT FOUND. Reasons:<br><ul style="list-style-type: none"> <li>Europe and Canada are not in the same parent/child hierarchy.</li> <li>The "No Filter" criteria on Products only retrieves an article assigned to No Categories.</li> </ul> | FOUND. Reasons:<br><ul style="list-style-type: none"> <li>Europe is an exact match.</li> <li>On Products, the article is assigned to No Categories and "No Filter" was chosen as a filter.</li> </ul>                                                                                                                    |
| Americas<br>AND<br>Desktop              | NOT FOUND. Reasons:<br><ul style="list-style-type: none"> <li>Laptop and Desktop are siblings rather than members of the same parent/child hierarchy.</li> <li>All Countries is the parent of America, but all filter criteria must be met.</li> </ul>     | FOUND. Reasons:<br><ul style="list-style-type: none"> <li>Canada is the child of America.</li> <li>Computers is the parent of Desktop.</li> </ul>                                                                                         | NOT FOUND. Reasons:<br><ul style="list-style-type: none"> <li>America and Europe are siblings rather than members of the same parent/child hierarchy</li> <li>If an article is not assigned to a category, "No Filter" must be selected in the corresponding category drop-down menu to retrieve the article.</li> </ul> |

### Products Category Group

- All Products
  - Consumer Electronics
    - Cameras
    - Audio
    - Printers
  - Enterprise Electronics
    - Routers
    - Switches
    - PEX
  - Computers

- Laptops
- Desktops
- PDAs

### **Geography Category Group**

- All Countries
  - Americas
    - USA
    - Canada
    - Brazil
  - Asia
    - China
    - Japan
    - India
  - Europe
    - France
    - United Kingdom
    - Poland

### SEE ALSO:

[Searching for Articles](#)

[Lemmatization Behavior with Salesforce Knowledge Article Searches](#)

## Lemmatization Behavior with Salesforce Knowledge Article Searches

Lemmatization is the process of grouping together the different forms of a word so they can be analyzed as a single term. With lemmatization, search can match other forms of a search term. For example, a search for *running* matches items that contain *run*, *running*, and *ran*. This behavior applies only to the type of word you search for: a search for a noun matches variants of the noun form, a search for a verb matches variants of the verb form, and so on.

 **Note:** Lemmatization is available only for articles that are marked as being in one of these languages: Danish, Dutch, English, French, German, Hebrew, Italian, Korean, Norwegian, Portuguese, Romanian, Russian, Spanish, or Swedish. Additionally, the search must be initiated by a user who is viewing the application in one of these languages. You can edit the default language for your organization on the Company Information page.

With lemmatization enabled, search terms typically undergo lemmatization, but note these details and exceptions.

### Wildcards

If a search phrase includes an asterisk (\*), none of the search terms undergo lemmatization. For example, a search for *quenching bev\** doesn't match *quench* or *quenched*.

### Exact Phrase Searches

If a search includes a phrase within quotation marks (" "), then the search terms undergo lemmatization. For example, a search for *"drink juice" delicious* matches *drank juices* and *deliciously*.

### Synonyms

A defined synonym does not undergo lemmatization in search results. However, the search term does. For example, if this synonym group is defined:

*quenched, drink orange juice*

Then a search for *quench* matches *quench*, *quenched*, *quenching*, and *drink orange juice*, but doesn't match *drinking orange juice*.

### SEE ALSO:

[Searching for Articles](#)

[Example of Article Search Results](#)

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### USER PERMISSIONS

To view published articles in the Articles tab or Articles related list:

- "Read" on the article type

To view draft, published, or archived articles in the Article Management tab:

- "Manage Articles"

AND

"Read" on the article type

## Promoting an Article in Users' Search Results

Associate keywords with articles to optimize search results in Salesforce Knowledge. Users who search for these keywords see the article first in their search results. Promoted search terms are useful for promoting an article that you know is commonly used to resolve a support issue when a user's search contains certain keywords.

Articles must be in published status for you to manage their promoted terms.

1. In the Article Management tab, select **Published Articles** in the View section, and then click the title of the published article that you want to promote for a search term.
2. In the Promoted Search Terms related list, click **New Promoted Term**.
3. Enter the keywords that you want to associate with the article.
  - You can associate the same term with multiple articles. If the user's search matches the promoted term, all associated articles are promoted in search results, ordered by relevancy.
  - The maximum number of characters per promoted term is 100. For best results matching users' search terms, limit each promoted term to a few keywords.
4. Click **Save**.

 **Example:** For example, if an article addresses a common support issue such as login problems, you can associate the terms *password* and *password change*. Article search matches a promoted term whenever all keywords within the term occur within the user's search terms, in any sequence. Each keyword must match exactly. For example:

- The promoted term *password* matches a search for *change password*.
- The promoted term *password change* matches a search for *how do I change my password* but doesn't match *forgot password*.
- The promoted term *password* doesn't match a search for *change passwords*.

Consider these limitations and general limits when you use promoted search terms.

- Your organization can create a maximum of 2,000 promoted terms. For best results, use them selectively, which means create a limited number of promoted terms and a limited number of promoted articles per term.
- If your organization translates articles into multiple languages, each promoted term is associated with one article version and the article version's language. If you need equivalent promoted terms to be associated with each translation, you must specify promoted terms for each translation. For example, associate *change password* with an English language article version and *changer mot de passe* with a French language article version.
- The end user's language setting determines the scope of the article search. Search results exclude article versions and any associated promoted terms that are not in the user's language.

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### USER PERMISSIONS

To create, edit, and delete promoted search terms:

- "Manage Promoted Search Terms"

## Viewing Articles

### Viewing and Editing an Article from the Articles Tab

To view a published article, click on its title in the Articles tab. The article's format and content depend on the article type chosen by your administrator, but all articles provide an expandable Properties header that contains the following information:

- **Article Audience**—The article's data categories. This field is only visible if you've defined data categories.
- **Article Number**—A unique number automatically assigned to the article.
- **Channels**—The channels the article appears in. Channels include:
  - Your internal app
  - Your partner portals
  - Your Customer Portals
  - Your public knowledge base
- **First Published**—Date and time the article was published originally.
- **Last Modified**—Date and time of the last major or minor update to the article.
- **Last Published**—Date and time of the last major update to the article. An author indicates a major update by flagging the article as new when it is republished.
- **Summary**—Short description of the article.
- **Validation Status**—Shows whether the article has been validated or not.

When enabled on the Knowledge Settings page, users can edit the current version of an article by clicking **Edit** and modifying it on the [article edit page](#).

The header also provides the ability to rate the article on a scale of one to five stars and view the article's average rating. Averages aren't static. Every 15 days, if an article hasn't received a new vote its average rating moves up or down according to a half-life calculation. This change ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently used articles. Articles without recent votes trend towards an average rating of three stars. You can rate each article only once.

If your organization uses Chatter, you can display a Chatter feed of updates, comments, and posts about the article.

### Viewing an Article from the Article Management Tab

On the list view page for draft, published, or archived articles:

- Click the article's title to view a read-only version of the article detail page. Click **Edit** to [update the article](#).
- Click **Preview** to see how the article appears for end users. From the Channel drop-down menu you can choose any channel where the article is visible except the public knowledge base.

 **Note:** Voting and Chatter information is not available when previewing a Knowledge article.

SEE ALSO:

[Salesforce Knowledge Overview](#)

[Salesforce Knowledge Terminology](#)

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To view published articles in the Articles tab or Articles related list:

- "Read" on the article type

To view draft, published, or archived articles in the Article Management tab:

- "Manage Articles"

AND

"Read" on the article type

To edit articles:

- "Edit" on the article type

## Salesforce Knowledge Article Versions

Article versions allows you to save an older version of a published article and then see which version of the article is associated with a case. To save the previous version, select the `Flag as new version` checkbox when publishing a new version. The previously published version is saved and the new version is published with the next sequential version number as an identifier.

When an article is attached to a case and a new version of the article is published, the system identifies the version attached to the case as being outdated. For example, if Version 2 is attached to a case and a third version is published, the article attached to the case becomes Version 2 (outdated). This notation ensures that there is a permanent record of which content was associated with the case.

When you click the version number in the Article View, and the Article or Translation Detail pages, you'll see the Version History list. In this list you can:

- View the list of archived versions.
- Click a version's title to view that version of the article.
- Expand the version to view its field change history (if you have history tracking enabled for the article type and for fields).

By default, the system stores up to ten versions of an article, plus any versions that are attached to cases.

When several versions of an article exist, you can restore an older version and republish it. Click `Revert to Draft Version` to copy the archived version's content into a draft article, then republish it as a new version. You can also restore the older version of any associated translations at the same time.

 **Note:** When there is an existing draft for the article, the option to revert isn't available.

You can delete an older, outdated version of a published article by selecting `Delete This Version` from the article detail page.

1. On the `Article Management` tab, in the left-side `View` panel, select the **Articles** tab.
2. Select **Published Articles**.
3. In the published articles list, click on the title of the article you want to delete.
4. In the left-side `Article Properties` panel, click the version number.
5. In the pop-up, click the version number you want to delete.
6. Click `Delete This Version`. Salesforce warns you when the version is associated with a case. If you delete the article version, it will no longer be attached to the case. Translated article versions are dependent on the master language article. If the master language version is deleted, the translated versions are also deleted.
7. To delete the version, click **Delete**.

Versions also appear in custom reports, allowing you to find and read the article version attached to a case.

SEE ALSO:

[Managing Articles and Translations](#)

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create, edit, or delete articles:

- "Manage Articles"
- AND
- "Create," "Read," "Edit," or "Delete" on the article type

To publish or archive articles:

- "Manage Articles"
- AND
- "Create," "Read," "Edit," and "Delete" on the article type

To submit articles for translation:

- "Manage Articles"
- AND
- "Create," "Read," and "Edit" on the article type

To submit articles for approval:

- Permissions vary depending on the approval process settings

## Creating and Editing Articles

### Creating Articles

To create an article:

1. On the Article Management tab or from the Articles related list within a case, click **New**.
2. If your knowledge base supports multiple languages, choose the language you're using.
3. Choose an article type, enter the article title, and click **OK**.
4. Edit the article's fields, and select a validation status. If your article contains a rich text area field you can add some formatting such as bulleted lists, links, and images.
5. In the Categories area, choose the categories to associate with your article:
  - Click **Edit** next to a category group to open the category selection dialog box.
  - In the `Available Categories` list expand the category hierarchy to select a category.
  - Click **Add** to move a selected category to the `Selected Categories` list—you can have up to 8 data categories from a data category group assigned to an article.



**Note:** You cannot add both a category and its child categories to the `Selected Categories` list. When you add a category to an article:

- Child categories in the `Available Categories` list are unavailable unless you remove the parent from the `Selected Categories` list.
- Child categories in the `Selected Categories` list disappear from that list.

Users searching for articles can find them by selecting an exact category or by selecting a parent or child category.

- Click **OK**.
6. In the Channels area, select where your article will be available once published:
    - **Internal App:** Salesforce users can access articles in the Articles tab depending on their role visibility.
    - **Customer:** Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
    - **Partner:** Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
    - **Public Knowledge Base:** Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.
    - **Your own website.** Articles can be made available to users through your company website.
  7. Click **Quick Save** to save your changes and remain on this page. Alternatively, click **Save** to save your changes, close the article, and go to the Article Management tab.
  8. Optionally:
    - [Create an assignment](#) for a user to edit or review the article.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create articles:

- "Manage Articles"
- AND
- "Create" and "Read" on the article type

To edit draft articles:

- "Manage Articles"
- AND
- "Read" and "Edit" on the article type

To edit published or archived articles:

- "Manage Articles"
- AND
- "Create," "Read," and "Edit" on the article type

- [Publish the article](#).
- Submit the article for approval. If you have the “Publish Articles” article action and an approval process is set up for an article, you'll see both **Publish...** and **Submit for Approval** buttons.

## Editing Articles and Translations

In addition to user permissions on the article type, you also need the “Edit Published and Archived Articles” article action to edit articles or translations.

To edit an article:

1. Click **Edit** on the Article Management tab, or click **Edit** on an article or translation detail page.
2. If it is a published article or translation, choose whether to leave it published while you work on a draft copy, or whether to remove the original article from publication and work on it directly. If you work on a copy, publishing the copy replaces the last published version of the article. If you work on the original article, it is unavailable in the channels until you republish it.
3. Edit the article's fields, and select a validation status. If your article contains a rich text area field you can add some formatting such as bulleted lists, links, and images.
4. In the Categories area, choose the categories to associate with your article:
  - Click **Edit** next to a category group to open the category selection dialog box.
  - In the `Available Categories` list expand the category hierarchy to select a category.
  - Click **Add** to move a selected category to the `Selected Categories` list—you can have up to 8 data categories from a data category group assigned to an article.

 **Note:** You cannot add both a category and its child categories to the `Selected Categories` list. When you add a category to an article:

  - Child categories in the `Available Categories` list are unavailable unless you remove the parent from the `Selected Categories` list.
  - Child categories in the `Selected Categories` list disappear from that list.

Users searching for articles can find them by selecting an exact category or by selecting a parent or child category.

  - Click **OK**.
5. In the Channels area, select where your article will be available once published:
  - Internal App: Salesforce users can access articles in the Articles tab depending on their role visibility.
  - Customer: Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
  - Partner: Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
  - Public Knowledge Base: Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.
  - Your own website. Articles can be made available to users through your company website.
6. Click **Quick Save** to save your changes and remain on this page. Alternatively, click **Save** to save your changes, close the article, and go to the Article Management tab.
7. Optionally:

- [Create an assignment](#) for a user to edit or review the article.
- [Publish the article](#).

## Implementation Tips

- When applying categories, choose the categories that a user would naturally look for as they navigate. Users only find an article if they select its explicitly applied category, the parent of that category, or a child of that category.
- Multiple users can edit the same article at the same time. If that occurs, your changes may be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to only edit the articles they're assigned.

## Best Practices

- Assign articles to the users who should work on them next. Enter assignment instructions that are direct, brief, and clear. Specify a due date to set expectations of when the assignment needs to be completed. If your knowledge base team consistently uses assignments in this manner, you can easily track the progress of your organization's draft articles by looking at the draft articles views on the Article Management tab.
- Make sure to assign yourself the articles you want to work on.

### SEE ALSO:

[Salesforce Knowledge Overview](#)

[Salesforce Knowledge Terminology](#)

[Assigning Draft Articles](#)

[Publishing Articles and Translations](#)

## Smart links to Salesforce Knowledge Articles

Smart linking from one article to another.

Smart links automatically adjust when the name or URL of an article is changed. For example, when the URL Name of an article is changed, Salesforce Knowledge automatically updates the article's URL based on the channel, adds the site prefix for a public knowledge base, and adds the community name for the community portal. There are two ways to create a smart link in the rich text editor to a Salesforce Knowledge article within another article:

- [Search for the article.](#)
- [Enter the article URL.](#)

**Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

## Smart links to Salesforce Knowledge Articles through Search

Smart linking from one article to another using the Link Article dialog in the rich text editor.

When creating or editing an article, you can use a keyword search to create a smart link in a rich text area field.

1. Place your cursor where you'd like to place the link.

2. Click the link icon, . The Link Article dialog appears.

3. Optionally, select which language to search.

If no language is selected, Salesforce Knowledge returns those articles in your knowledge base's default language that are related to your keyword search.

4. Optionally, select the publish status type to search.

- Online (default if no publish status is selected)
- Draft
- Draft translations (if your knowledge base supports multiple languages)

5. Enter article keywords into the search bar.

6. Click the search icon at the end of the search bar. The top 20 related articles display.

7. Select the article to reference in a smart link from the article list.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create articles:

- "Manage Articles"
- AND
- "Read" and "Create" on the article type

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create articles:

- "Manage Articles"
- AND
- "Read" and "Create" on the article type

**Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

8. Optionally, click **Go to Article** to view the article in another window and ensure it is the correct reference.

9. Optionally, click the Target tab and select where the referenced article will display.

- **Not Set:** Opens the linked article in the same frame as it was clicked.
- **Frame:** Opens the linked article in a designated frame.
- **New Window (\_blank):** Opens the linked article in a new window or tab.
- **Topmost Window (\_top):** Opens the linked article in the full body of the window.
- **Same Window (\_self):** Opens the linked article in the same frame as it was clicked.
- **Parent Window (\_parent):** Opens the linked article in the parent frame.

10. Click **OK**.

**Note:** Smart links add more characters than what is displayed. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

## Smart links to Salesforce Knowledge Articles with URLs

Smart linking from one Salesforce Knowledge article to another by manually entering the article URL in the rich text editor.

When creating or editing an article, you can manually create a smart link in a rich text area field.

1. Highlight the content or place your cursor where you'd like to place the link.

2.

Click the link icon, .

3. Select Link Type **URL**.

4. Select Protocol **<other>**.

5. Enter the article URL as: `/articles/[language]/[articleType]/[URLName]`.

For example, for an English article in a multiple language knowledge base, of article type FAQ, with a URL Name of About-Passwords the article URL is:

`/articles/en_US/FAQ/About-Passwords`. Add a language only if your Salesforce Knowledge base supports multiple languages.

**Important:** Smart links are based on the channels they are in. Therefore, you can't add a smart link to an article in another channel. For example, an article on your public knowledge base can't link to an article only published in your internal channel.

6. Optionally, click the Target tab and select where the referenced article will display.

- **Not Set:** Opens the linked article in the same frame as it was clicked.
- **Frame:** Opens the linked article in a designated frame.
- **New Window (\_blank):** Opens the linked article in a new window or tab.
- **Topmost Window (\_top):** Opens the linked article in the full body of the window.
- **Same Window (\_self):** Opens the linked article in the same frame as it was clicked.
- **Parent Window (\_parent):** Opens the linked article in the parent frame.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create articles:

- "Manage Articles"

AND

"Read" and "Create" on the article type

**7.** Click **OK**.

**Note:** Smart links add more characters than what is displayed. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

## Assigning Draft Articles

Working on draft articles is often a team effort: different members of the editorial staff create drafts, review the text and formatting, add graphics, and so on. With Salesforce Knowledge, you assign draft articles to collaborators once you're finished with your task.

For example, say you create an article and assign it to yourself with the instruction "Write content before the 10th" (as described in step 1 in [Example draft article assignment](#)). On the 10th, your article is complete but you need help from a visual designer. You assign your article to your visual designer with the instruction "Finalize the visual design before the 20th" (step 2). When the visual designer opens the Article Management tab, he or she sees the new assignment by selecting **Draft Articles Assigned to Me**. When the visual design is finished, the designer reassigns the article back to you for a final check. The article now displays with a new instruction: "Please review the article before publishing" (step 3). Finally, you review the article and decide to [schedule its publication](#) on the 31st.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create draft articles:

- "Manage Articles"

AND

"Create" and "Read" on the article type

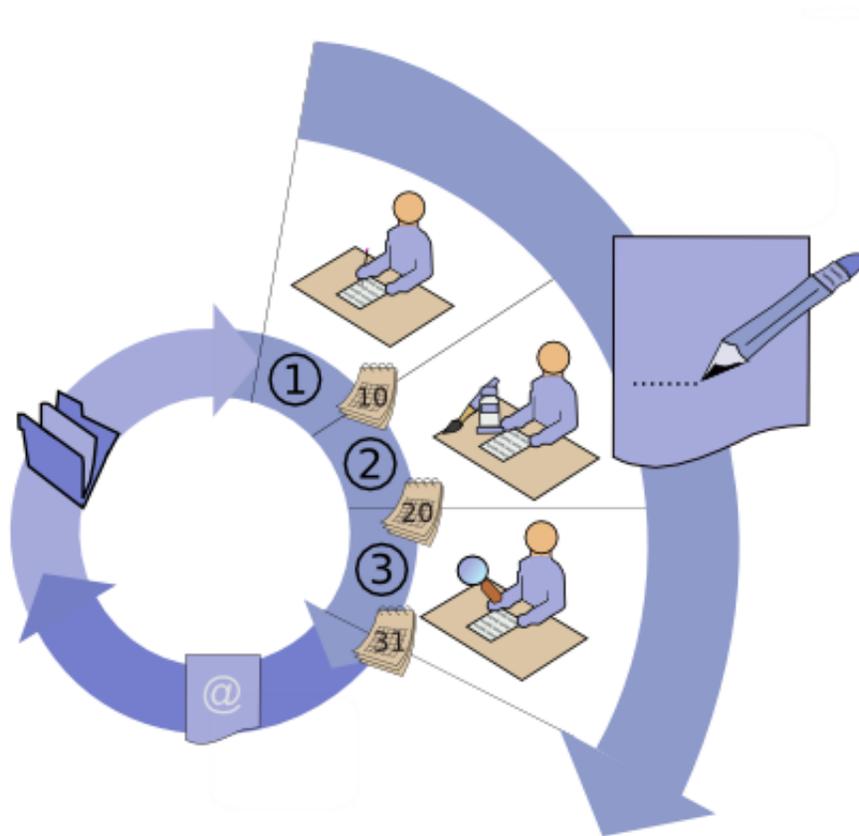
To assign draft articles:

- "Manage Articles"

AND

"Read" and "Edit" on the article type

### Example draft article assignment



An assignment is a draft article that has been assigned to another user for editing. Assignments may contain brief instructions and a due date. When you [create an article](#), a new assignment is automatically attached to it. You can edit the assignment, enter the instructions, choose an assignee, and specify a due date. Articles can only have one assignment at a given time. Note that all users with sufficient permissions can edit an article, even if they're not the assignee.

To display your assignments on the Manage Articles tab:

1. Click the **Articles** tab in the view area.
2. Select **Draft Articles**.
3. Filter articles by those assigned to **Me**. You can see a list of all draft articles for your organization by filtering by those assigned to **Anyone**.

To assign or reassign an article:

1. In a **Draft Articles** list, select the checkbox next to an article and click **Assign...**. Alternatively, click **Assign...** from the article detail page or the article edit page.
2. Choose a user.
3. Enter instructions for the assignment.
4. Choose a due date.
5. Check **Send Email** to send an email to the selected users with instructions included.

 **Note:** When you select multiple articles, every assigned user receives one email for every 10 articles assigned.

6. Click **OK**.

## Best Practices

- If your editorial process involves several draft stages and collaborative tasks, use assignments to manage these steps.
- Multiple users can edit the same article at the same time. If that occurs, your changes may be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to only edit the articles they're assigned.
- Make sure to assign yourself the articles you want to work on.

### SEE ALSO:

[Salesforce Knowledge Terminology](#)

[Publishing Articles and Translations](#)

[Creating and Editing Articles](#)

## Publishing Articles and Translations

Publishing articles and translations makes them visible in all [channels](#) selected. If you publish an article that has translations, all versions of the article are published.

In addition to permissions on an article's article type, you also need the "Publish Articles" or "Publish Translated Articles" article action to publish an article or translation. Alternatively, if your organization has implemented approval processes, you'll be able to publish an article after it has been approved. Note that approval processes aren't available for translations.

1. On the Article Management tab, filter the articles in the view area, select an article or articles, and click **Publish...** Alternatively, click **Publish...** on either the detail page or edit page of an article.
2. Select `Publish article(s) now` or `Schedule publication on` to choose the date to publish the article.
3. If the article has previously been published, select the `Flag as new version` checkbox to make the new article icon (✳) display next to your article in the selected channels. Users from these channels can see that this article has been modified since the last time they've read it. This checkbox is not available when you publish an article for the first time, as the icon displays by default for new articles.

If the draft being published is a working copy of a currently published article, it is published as a new version of the original.

4. Click **OK**.

Articles you scheduled for publication at a later date continue to appear in the Draft Articles filter, now with the pending icon (🕒) next to the article title. Hover over the icon to see the publication date.

### Note:

- If you [assign](#) an article that is scheduled for publication, you also cancel the scheduled publication.
- Scheduling a publication removes any assignment information. The user who scheduled the publication is assigned to the article.

### EDITIONS

Available in: **Salesforce Classic**

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To publish articles:

- "Manage Articles"

AND

"Create," "Read," "Edit," and "Delete" on the article type

To publish translated articles:

- "Manage Articles"

AND

"Create," "Read," "Edit," and "Delete" on the article type

- Conflicts may occur when different users perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error message.
- If you have the “Publish Articles” article action and an approval process is set up for an article, you'll see both **Publish...** and **Submit for Approval** buttons.

 **Tip:** To cancel a scheduled publication, click **Cancel Publication** on the article or translation detail or edit page.

#### SEE ALSO:

[Salesforce Knowledge Terminology](#)

[Assigning Draft Articles](#)

[Viewing Articles](#)

[Creating and Editing Articles](#)

## Deleting Articles and Translations

Deleting an article or translation permanently removes it from the knowledge base. You can delete draft articles, draft translations of articles, or archived articles.

#### **Note:**

- To delete published article and translations, first remove them from publication by choosing edit or archive.
- When a user without delete access cancels the editing on published article, the newly created article draft is not deleted automatically.

To delete articles and translations:

1. On the Article Management tab, click the **Articles** tab in the View area.
2. Select Draft Articles or Archived Articles, select the article you want to delete, and click **Delete**. Alternatively, click **Delete** on the detail page of a draft or archived article or draft translation.
3. Click **OK**.

Deleting articles moves them to the Recycle Bin, where you can undelete them if you change your mind. If you delete an article with translations, the translations are also moved to the Recycle Bin. However, if you delete a single translation, you can't undelete it. Deleting an article or translation may fail if another user or the system simultaneously modifies it while the deletion is being processed. You'll receive an error message if this occurs.

#### **Note:**

- Conflicts may occur when different users perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error message.
- If you delete a draft article that is a working copy of a currently published article, the original published version is not affected but the draft version is permanently removed. It does not go to the Recycle Bin. You can edit the published version to work again on a draft copy.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To delete a draft, published, or archived article

- “Manage Articles”

AND

“Read,” “Edit,” and “Delete” on the article type

- When a user without delete access cancels editing a published article, the newly created article draft is not deleted automatically.

SEE ALSO:

[Salesforce Knowledge Terminology](#)

## Managing Articles and Translations

The Article Management tab is your home page for working with articles throughout the publishing cycle as they are created, assigned to collaborators, translated, published, and archived. In addition to having the correct permissions on an article's article type, you also need article actions to complete some tasks.

| Article Action                  | Lets You                                         |
|---------------------------------|--------------------------------------------------|
| Publish Articles                | Publish articles.                                |
| Publish Translated Articles     | Publish translated articles.                     |
| Submit Articles for Translation | Submit articles for translation.                 |
| Archive Articles                | Archive articles, including translated articles. |

The Article Management tab defaults to the Articles view.

### Article Publishing Cycle

Articles move through a publishing cycle, which is depicted in the graphic below:

1. Create and save a new article.
2. Reassign the article to an editor, translator, reviewer, or any other collaborator as needed. That person can reassign the article as many times as necessary until the content is ready for publication. If an approval process is set up for the article type, you or the person you reassign to submits the article for approval. The article is routed to the appropriate approver or set of approvers, who either approve or reject it.
3. **Publish** the completed draft to one or more channels, depending on the audiences you've configured: the Articles tab in your Salesforce organization, a customer portal, a partner portal, or a public knowledge base. You can schedule the article to be published on a future date.
4. Update the article as needed. When modifying a published article, you can either remove it from publication so that the original is no longer visible to users, or leave the original published and work on a copy until you're ready to replace the original with your update.
5. Archive the article when it is obsolete to remove it from publication. As with publishing an article, you can archive immediately or on a future date.
6. Delete the article as needed, or turn it into a draft and begin a new publishing cycle.

#### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

#### USER PERMISSIONS

To create, edit, or delete articles:

- "Manage Articles"

AND

"Create," "Read," "Edit," or "Delete" on the article type

To publish or archive articles:

- "Manage Articles"

AND

"Create," "Read," "Edit," and "Delete" on the article type

To submit articles for translation:

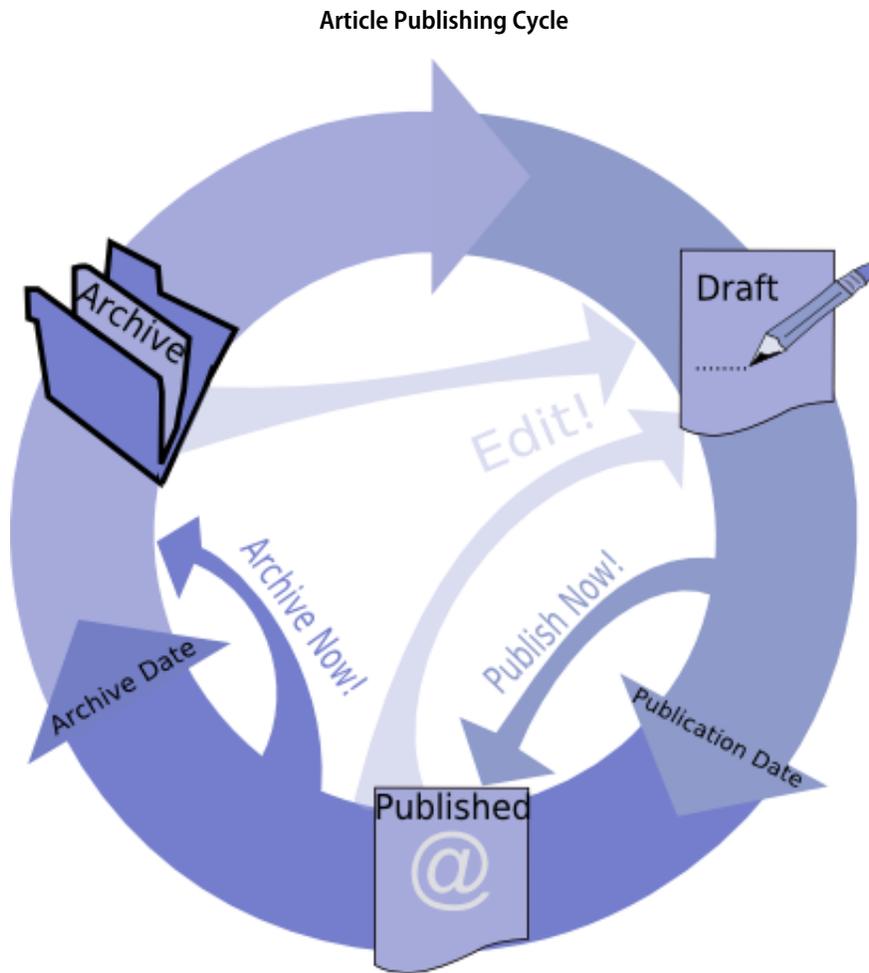
- "Manage Articles"

AND

"Create," "Read," and "Edit" on the article type

To submit articles for approval:

- Permissions vary depending on the approval process settings



## Choosing Articles to View

To specify which articles appear in the list view, use the following options in the sidebar:

- In the View area, select [Draft Articles](#), [Published Articles](#), or [Archived Articles](#). You can filter draft articles by those assigned to you or those assigned to anyone (all draft articles for your organization).
- If applicable, click the Translations tab in the View area, and select [Draft Translations](#) or [Published Translations](#). You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization).
- To refine the current view, you must first select an article language filter and then enter a keyword or phrase in the `Find in View` field. The `Find in View` field is inactivated for archived articles.
- In the Filter area, choose a category from a drop-down menu to filter the current view.

## Choosing Columns

To modify which columns display, click **Columns**. The following columns are available depending on what is selected in the view area:

| Column                   | Description                                                                                                                           | View                                                       |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| Action                   | Displays the actions available for the article or translation.                                                                        | All articles and translations                              |
| All User Ratings         | Average ratings from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base. | Published and archived articles and published translations |
| Archived Date            | Date the article was archived.                                                                                                        | Archived articles                                          |
| Article Number           | Unique number automatically assigned to the article.                                                                                  | All articles and translations                              |
| Article Title            | Click to view the article.                                                                                                            | All articles                                               |
| Assigned to              | The user who is assigned work on the article.                                                                                         | Draft articles and translations                            |
| Assignment Details       | Instructions for the assignment.                                                                                                      | Draft articles and translations                            |
| Assignment Due Date      | Date to complete work on the article. If the date has passed, it displays in red.                                                     | Draft articles and translations                            |
| Created Date             | Date the article was written.                                                                                                         | Draft articles and translations                            |
| Customer Ratings         | Average ratings from users on the Customer Portal and the public knowledge base.                                                      | Published and archived articles and published translations |
| Language                 | The language an article is translated into.                                                                                           | Draft and published translations                           |
| Last Action              | The date and type of the last action taken on a translation.                                                                          | Draft and published translations                           |
| Last Modified by         | Last person to update the article.                                                                                                    | Draft articles and translations                            |
| Last Modified Date       | Last date the article was edited.                                                                                                     | All articles and translations                              |
| Most Viewed by all Users | Average views from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base.   | Published and archived articles and published translations |
| Most Viewed by Customers | Average views from users on the Customer Portal and the public knowledge base.                                                        | Published and archived articles and published translations |
| Most Viewed by Partners  | Average views from users on the partner portal and the public knowledge base.                                                         | Published and archived articles and published translations |
| Partner Ratings          | Average ratings from users of your partner portal and public knowledge base.                                                          | Published and archived articles and published translations |
| Published Date           | Date the article was published.                                                                                                       | Published articles and translations                        |
| Source Article           | The original article before translation. Click on the article title to view the article.                                              | Draft and published translations                           |

| Column             | Description                                                                                                                                                                                         | View                                        |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| Translated Article | The title of the translated article. Click on the translation title to edit the translation.                                                                                                        | Draft and published translations            |
| Translation Status | Status in the translation cycle. Hover over the icon(s) to view the status for each translation. If a translation has been published, there are separate tabs for draft and published translations. | Articles submitted for translation          |
| Type               | The article's type, such as FAQ or Product Description, that determines what information the article contains.                                                                                      | All articles                                |
| Validation Status  | Shows whether the content of the article has been validated.                                                                                                                                        | All articles and translations, when enabled |
| Version            | The article's version. Hover over the version number to view details about other versions of the article.                                                                                           | All articles                                |

## Article and Translation Management Tasks

To create and manage articles and translations:

- Enter a search term or use the category drop-down menu to [find an article](#) or translation.
- Click **New** to create a new article.
- Select an article or translation and click **Publish...** to [make it visible in the selected channels](#). If you have the "Publish Articles" article action and an approval process is set up for an article, you'll see both **Publish...** and **Submit for Approval** buttons.
- Click **Edit** next to an article or [translation](#) to modify its content or properties.
- Click **Preview** next to an article or translation to see how it will appear for end users. From the `Channel` drop-down menu you can choose any channel where an article is visible except the public knowledge base.



**Note:** Voting and Chatter information is not available when previewing a Knowledge article.

- Click the version number of the article or translation to see a list of its other versions.
- Select an article or translation and click **Assign...** to change the owner of an article or translation.
- Select an article or translation and click **Delete** to send an article or translation to the Recycle Bin.
- Select an article and click **Archive...** to archive a published article.
- If multiple languages for Salesforce Knowledge is set up, select an article or articles and click **Submit for Translation**.

## Submitting Articles for Translation

If your knowledge base supports multiple languages, the Submit for Translation option is available.

To submit articles for translation from the Article Management tab:

1. Select an article or articles and click **Submit for Translation**.
2. Optionally, select a due date for one translation or all translations. You can set due dates for each language. Due dates appear on the Translations list view. They display in red if the date is passed.

3. Select from the languages supported by your knowledge base.
4. Optionally, change the assignee. You can assign the article to another knowledge base user for translation, or assign the article to a queue for export to a translation vendor.
5. If you want email notifications sent to the assignees, check `Send notification email`.
6. Click **Save**.

Once translations are submitted, users with the “Manage Articles” permission can manage them on the **Article Management** tab. To view submitted translations, select **Translations** in the View area. You can edit, preview, publish, assign, and delete translations.

 **Tip:** The related links area of the **Article Management** tab takes you directly to the setup pages for exporting articles for translation (**Export Articles for Translation**) and importing translations (**Import Article Translations**).

#### SEE ALSO:

- [Salesforce Knowledge Terminology](#)
- [Publishing Articles and Translations](#)
- [Creating and Editing Articles](#)
- [Searching for Articles](#)
- [Viewing Articles](#)

## The Articles or Knowledge Tab

Find out which Salesforce Knowledge tab are you using and what you can do on each.

There are two tabs for searching Salesforce Knowledge articles: the [Knowledge](#) tab or the [Articles](#) tab. The one you use depends on when your organization started using Salesforce Knowledge or if it adopted the Knowledge tab.

### The Knowledge tab

If the search bar is at the top of the main frame of the page you are using the Knowledge One on the Knowledge tab.

#### EDITIONS

Available in: **Salesforce Classic**

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

#### USER PERMISSIONS

To view articles:

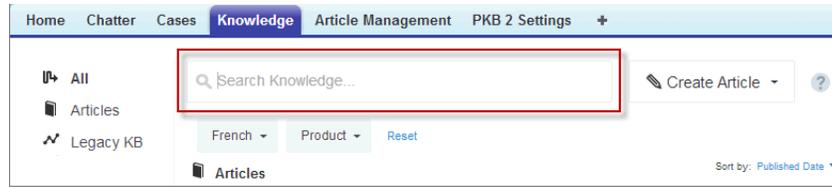
- “Read” on the article type

To create articles:

- “Manage Articles”

AND

“Read” and “Create” on the article type



The Knowledge tab merges functionality of the old Articles tab and the Article Management tab and uses federated search to search all your resources at once. On the Knowledge tab, you can:

- [Search](#) all your Salesforce Knowledge articles and any of your external data sources, such as Microsoft® SharePoint®.
- [Filter](#) articles by language and data categories.
- Sort articles by published date, rating, most viewed, and title.
- Use the **Create Article** drop-down to select an article type and [create an article](#).
- Use the drop-down by each article to follow or unfollow, [edit](#), [publish](#), and [delete](#) an article, depending on your permissions.

Also, when you use case feed, the Knowledge tab layout is applied to the article sidebar.

To switch to the Knowledge One and the Knowledge tab, have your administrator add the `Knowledge One` permission to your profile or permission set.

### The Articles tab

If the search bar is in the left-side panel of the page you are using the Articles tab.



The Articles tab presents a list of your Salesforce Knowledge published articles. On the Articles tab, you can:

- [Search for published articles](#)
- [View published articles](#)
- [Create an article](#)
- [Customize the article information displayed](#)

 **Note:** Community members without the Knowledge One permission cannot access Knowledge through Communities. They also can't access Knowledge in communities via the Salesforce1 mobile browser and downloadable apps.

### SEE ALSO:

[Salesforce Knowledge Overview](#)

[Creating and Editing Articles](#)

[Searching for Articles](#)

[Viewing Articles](#)

## Customizing the Article Tab

Select the article information displayed and sort the articles on that information.

The Article tab default list view contains articles that were created or updated during the last 30 days. To choose what article information is displayed and sort articles by that information:

1. Click the **Columns** drop-down.
2. Click the article information you want to display.

New columns are placed at the far right of the article list. Available columns include:

| Column                   | Description                                                                                                                                                                                                             |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Ratings            | The average rating given to the article by knowledge agents using the internal app.                                                                                                                                     |
| All User Ratings         | The average rating cast by knowledge agents, partners, and customers. Visitors to the public knowledge base cannot rate articles. For details about user ratings, see <a href="#">Viewing Articles</a> on page 161.     |
| Article Number           | Unique number automatically assigned to the article. Numbering for articles starts at "000001000." You can't change the format and numbering for this field.                                                            |
| Article Title            | The article's title. This column can't be removed.                                                                                                                                                                      |
| Customer Ratings         | The average rating that customers have given the article. This option only displays if your organization exposes articles via the Customer Portal.                                                                      |
| Most Viewed by Agents    | Comparative indicator calculated by adding knowledge agent views.                                                                                                                                                       |
| Most Viewed by all Users | Comparative indicator calculated by adding views from all relevant channels: <a href="#">knowledge agents</a> (internal users), Customer Portal users, partner portal users, and visitors to the public knowledge base. |
| Most Viewed by Customers | Comparative indicator calculated by adding Customer Portal user views.                                                                                                                                                  |
| Most Viewed by Partners  | Comparative indicator calculated by adding partner portal views.                                                                                                                                                        |
| Most Viewed by Visitors  | Comparative indicator calculated by adding public-knowledge-base visitor views.                                                                                                                                         |
| New                      | Flag that indicates whether you have viewed an article.                                                                                                                                                                 |
| Partner Ratings          | The average rating that partners have given the article. This option only displays if your organization exposes articles via the partner portal.                                                                        |
| Published Date           | Date the article was published.                                                                                                                                                                                         |
| Type                     | Article type assigned to the article. Article types determine the content and format of each article.                                                                                                                   |
| Validation Status        | Shows whether the content of the article has been validated.                                                                                                                                                            |

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To view articles:

- "Read" on the article type

 **Note:** You can only select one information column at a time.

3. Drag the column headers in the order you want them displayed.
4. Click a column header to sort the list according to that column's value.  
You can sort by any column except `Type`.
5. Click the arrow at the bottom of the page to change the number of articles that display on the page at one time.

SEE ALSO:

[The Articles or Knowledge Tab](#)

[Salesforce Knowledge Overview](#)

## Translating Articles within Salesforce Knowledge

Depending on the status of your translation and the article actions assigned to you, you can do the following from the translation detail page.

| Action           | Description                                                                                                                                                                                                                                             | Article Status                                        |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| <b>Archive</b>   | Archiving removes published translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.                                                                                      | To archive a translation, archive its master article. |
| <b>Assign...</b> | Assigning changes the owner of the translation.                                                                                                                                                                                                         | Draft translations                                    |
| <b>Delete</b>    | Deleting a translation permanently removes it from the knowledge base.<br><br> <b>Note:</b> You can't undelete a draft translation.                                  | Draft translations                                    |
| <b>Edit</b>      | Editing modifies the translation's content or properties.                                                                                                                                                                                               | Draft and published translations                      |
| <b>Preview</b>   | Previewing shows how the translation appears to end users.<br><br> <b>Note:</b> Voting and Chatter information is not available when previewing a Knowledge article. | Draft and published translations                      |

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To work with translated articles:

- "Manage Articles"

AND

"Create," "Read," "Edit," or "Delete" on the article type (depending on the action)

| Action            | Description                                                                          | Article Status     |
|-------------------|--------------------------------------------------------------------------------------|--------------------|
| <b>Publish...</b> | Publishing translations makes them visible in all <a href="#">channels</a> selected. | Draft translations |

To translate an article within Salesforce:

1. Click the **Article Management** tab and select **Translations** in the View area.
2. Select **Draft Translations**.
3. Optionally, change the **Assigned To** filter to view articles that are not assigned to you for translation. For example, you may want to view articles assigned to a translation queue.
4. Click **Edit** next to the article and language you want to translate.
5. Enter your translation.
6. Click **Save**.



**Note:** You can also edit a published translation. It reverts to draft status until you republish it, although you can choose to keep the existing version published while you update it.

## Tracking Article History

You can track the history of certain fields in articles. If you have history tracking enabled for an article type and its fields, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations. When you track old and new values, the system records both values as well as the date, time, nature of the change, and the user who made the change. When you track only the changed values, the system marks the changed field as having been edited; it doesn't record the old and new field values. This information is available in the Version History list and the fields are available in the Article Version History report.

Article history respects field, entity, and record-level security. You must have at least "Read" permission on the article type or the field to access its history. For data category security, Salesforce determines access based on the categorization of the online version of an article. If there is no online version, then security is applied based on the archived version, followed by the security of the draft version.

1. From Setup, enter *Knowledge* in the **Quick Find** box, then select **Knowledge Article Types**.
2. Create an article type or edit one from the Article Types list.
3. Click **Set History Tracking**.
4. Choose the fields you want to track.  
Salesforce begins tracking history from that date and time. Changes made before that date and time are not tracked.
5. Click **Save**.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To create, edit, or delete article types:

- "Customize Application"  
AND  
"Manage Salesforce Knowledge"

## Setting an Article's Field-Level Security

Field-level security lets administrators restrict users' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for Customer Portal profiles.

If using both article-type layout and field-level security to define field visibility, the most restrictive field access setting always applies. For example, if a field is hidden in the article-type layout, but visible in the field-level security settings, the layout overrides security settings and the field won't be visible. Some user permissions override both page layouts and field-level security settings. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings.

 **Important:** Field-level security doesn't prevent searching on the values in a field. When search terms match on field values protected by field-level security, the associated records are returned in the search results without the protected fields and their values.

To define field-level security:

1. Define security via a permission set, profile, or field.
  - For permission sets or profiles:
    - a. From Setup, either:
      - Enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**, or
      - Enter *Profiles* in the **Quick Find** box, then select **Profiles**
    - b. Select a permission set or profile.
    - c. Depending on which interface you're using, do one of the following:
      - Permission sets or enhanced profile user interface—In the **Find Settings...** box, enter the name of the object you want and select it from the list. Click **Edit**, then scroll to the Field Permissions section.
      - Original profile user interface—In the Field-Level Security section, click **View** next to the object you want to modify, and then click **Edit**.
  - For fields:
    - a. From Setup, enter *Knowledge Article Types* in the **Quick Find** box, then select **Knowledge Article Types**.
    - b. Select the article type that contains the field to modify.
    - c. Select the field and click **Set Field-Level Security**.
2. Specify the field's access level.
  -  **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.
3. Click **Save**.

After setting field-level security, you can modify the article-type layouts to organize the fields on detail and edit pages.

### EDITIONS

Available in: Salesforce Classic

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

### USER PERMISSIONS

To set field-level security:

- "Customize Application"  
AND  
"Manage Salesforce Knowledge"

# Using Unified Help Desks

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## Use a Salesforce Console

### Use a Salesforce Console

Get more done faster using a console's enhanced interface to work with records.

Unlike standard Salesforce pages, all items you click in a console display as tabs. Along with the efficiency of tab-based navigation, a console helps you:

- [Work with many records simultaneously](#)
- [View most recently used tabs and bookmarks](#)
- [Resize pinned lists to see more information](#)
- [Navigate more quickly using keyboard shortcuts](#)
- [Work across multiple monitors](#)

A console's dashboard-like interface organizes related data all on one screen so that you can:

- [Search for records](#)
- [Jot notes on records using the interaction log](#)
- [See when records you're viewing have been edited by others](#)
- [Use a SoftPhone to make and receive calls](#)

Additionally, with a Salesforce console for service, you can:

- [Find Salesforce Knowledge articles to solve cases](#)
- [Chat with customers using Live Agent](#)

 **Note:** If your administrator adds custom console components, additional functionality might be available for you in the sidebars and footers of a console.

#### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Salesforce Console Tabs

Any items you click on in a console display as tabs. Tabs let you see all the information you need on one screen without losing context.

### EDITIONS

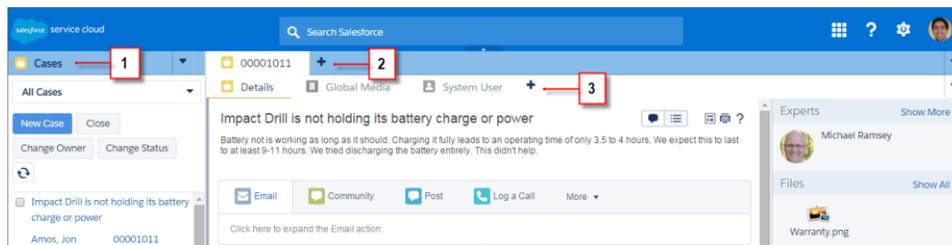
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

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### Console Tabs



(1) The navigation tab lets you select objects and records to work with. (2) Primary tabs display the main work items in a console, such as an account. (3) Subtabs display related items on a primary tab, such as an account's contact. Use tabs to navigate within the console as you do your work.



**Warning:** Browsers' back buttons aren't supported for a console and might not work as expected. Console tabs are saved in browser tabs until you close them.

When you close browser tabs, you lose any open console tabs. If your administrator sets up saved user sessions for a console, when you log back into Salesforce, any of your previously open console tabs and console components automatically appear again. Also, if you resize any sidebar components, interaction logs, or close the global search header, those customizations appear again too.

If you log out of Salesforce and log in again using the same window, your previously open tabs reopen in the new session, even when `Save User Sessions` is disabled.

## Salesforce Console Navigation Tab

Use the navigation tab to select an object and view its home page.

### EDITIONS

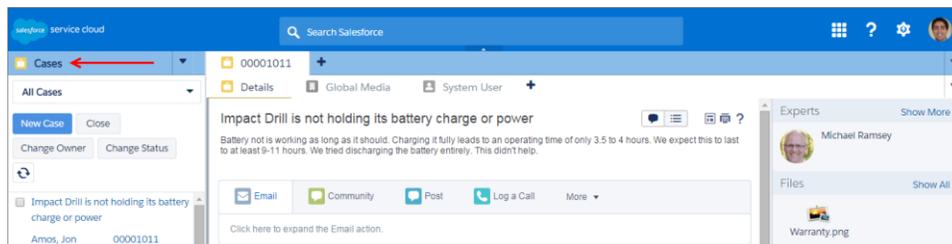
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

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### A Console's Navigation Tab



Each console displays one navigation tab. Your administrator determines the list of objects you can choose from a navigation tab, but if it's turned on for you, you can click **Customize My Tabs** to hide, display, and organize the objects.

Most object home pages selected from a navigation tab display list views, which automatically appear as enhanced lists. A navigation tab doesn't display forecasts, ideas, answers, connections, portals, console, or buttons for customizing your organization.

## Guidelines for Working with Salesforce Console Tabs

Learn how you can get the most out of working with a console's primary tabs and subtabs.

### EDITIONS

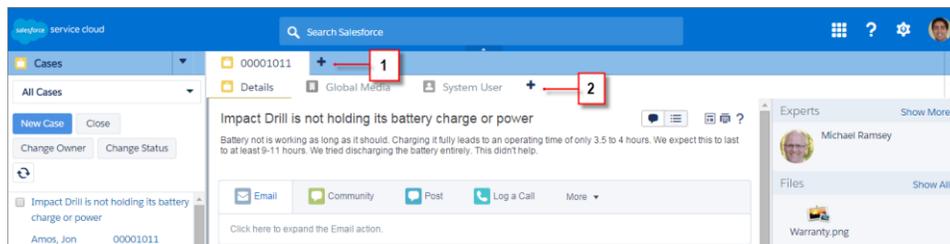
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### A Console's Primary Tabs and Subtabs



(1) A primary tab is the main item to work on, such as an account. (2) A subtab is a related item on a primary tab, such as an account's contact. Salesforce doesn't limit the number of tabs you can display.

When viewing tabs, \* appears on tabs where you haven't saved changes, except for reports, Visualforce pages, or your organization's setup pages. ▲ appears on tabs where you need to fix errors. If your administrator has added external domains to a console's whitelist, tabs can display pages outside of Salesforce. New tabs don't appear when you click a custom button or change a record's type, owner, or territory; instead, the current tab goes to the item you selected.

You can do a variety of things with tabs from the tab bar by clicking ▼ and selecting an option, such as closing tabs, refreshing tabs, showing keyboard shortcuts, and more. To rearrange a tab, drag it to a new position along the tab bar. Tabs maintain their status as primary tabs or subtabs, meaning that you can't move primary tabs to the subtabs bar or vice versa. Rearranging tabs isn't available for Internet Explorer® 7.

If your administrator has turned on multi-monitor components, you can pop out primary tabs from your browser and drag them to any location on your screen to personalize the way you work. Just click ▼ and select **Pop out primary tabs**. To return primary tabs to their original browser, click ▼ and select **Pop tabs back into console**.

To copy the URL of a console tab and send it to another user, click  and select  next to the tab's name. If you're sending the URL to a non-console user, choose to create a standard Salesforce URL from the Link to Share dialog box. Then, press CTRL+C to copy the URL. To add a new tab to your console in which to paste a URL you've copied, click . In the text box, press CTRL+V to paste the URL, then click **Go!**. You can paste a console URL or a standard Salesforce URL into a new tab.

To pin a frequently visited primary tab to the tab bar for quick access, click  and select . When a tab is pinned, it's moved to the front of the tab bar and its text is removed to provide more screen space. To unpin a tab, click  and select .

To bookmark a favorite or occasionally visited tab for quick access, click  and select . When a tab is bookmarked, it's moved to the History component in the footer (formerly named Most Recent Tabs). To remove a bookmarked tab, click  and select , or click **Remove** next to the tab in the History component. See [View Bookmarks or Recently Used Tabs in a Salesforce Console](#) on page 187.



**Warning:** If you click **Cancel** on a newly created item that you haven't saved, the item and its tab are deleted and aren't sent to the Recycle Bin.



**Note:** If your administrator adds custom console components, additional functionality might be available for you to work with in the sidebars next to tabs.



**Tip:** To reopen the last tab you closed, press SHIFT+C or click  and select **Reopen last-closed tab**. You can reopen up to ten closed tabs.

## View Bookmarks or Recently Used Tabs in a Salesforce Console

If set up by your administrator, you can quickly access any primary tabs that you've bookmarked or recently used in a console without having to search Salesforce.



**Note:** With Summer '15, Most Recent Tabs was renamed History and bookmarks were added to it to give you a more streamlined experience for finding and retrieving tabs. These features aren't available in Internet Explorer® 7 and 8.

To view any bookmarked or recently used primary tabs, click **History** in the console's footer. Then click the Bookmarks or Recent Tabs column and select a tab. You can get each tab's URL to send it to another user, or remove bookmarks and clear recently used tabs to start from scratch. Next to each recent tab, you can access up to ten subtabs when they're available. Items that don't display as tabs, such as meeting request overlays, don't display in the History footer.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Resize and Minimize Pinned Lists in a Salesforce Console

If an administrator has turned on pinned lists and chosen where they display on screen, you can resize and minimize the lists.

To resize a pinned list, click the right or bottom margin of the list and drag it to the size you want. To minimize a pinned list, click the arrow on the right or bottom margin. To display the list again, click the arrow once more. If you haven't yet selected a record from a list, the list automatically displays full screen.

## Work with Keyboard Shortcuts in a Salesforce Console

Keyboard shortcuts let you quickly perform actions by pressing keys instead of having to use a mouse.

Keyboard shortcuts can make working with a console more efficient. For example, instead of typing case details and then using a mouse to click **Save**, an administrator can create a shortcut so that you can type case details and press CTRL+S to save cases without switching to your mouse. Only administrators can create or customize shortcuts.

To view an overlay that lists shortcuts for a console, press SHIFT+K or click  and select **Show Keyboard Shortcuts**. If a shortcut appears dimmed on the overlay, it hasn't been enabled or it's been customized.

Keyboard shortcuts aren't case sensitive, even when you press SHIFT before a letter key. For example, SHIFT+b is the same as SHIFT+B. If CTRL, ALT, or SHIFT is in a keyboard shortcut, the sequence of those keys doesn't matter. For example, CTRL+ALT+A is the same as ALT+CTRL+A.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### EDITIONS

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Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

## Default Keyboard Shortcuts for a Salesforce Console

These shortcuts are automatically available for a console, and an administrator can customize or turn them off.

| Action (Keyboard Shortcut)     | Description                                                                                                                                                                                                                                 | Key Command                               |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| Enter keyboard shortcuts mode  | Activates keyboard shortcuts in a browser displaying a console.                                                                                                                                                                             | ESC                                       |
| Go to the navigation tab       | Selects the navigation tab.                                                                                                                                                                                                                 | V                                         |
| Go to field on tab             | Selects details on a tab.                                                                                                                                                                                                                   | SHIFT+S                                   |
| Go to the primary tabs         | Selects the row of primary tabs.                                                                                                                                                                                                            | P                                         |
| Go to the subtabs              | Selects the row of subtabs on a primary tab.                                                                                                                                                                                                | S                                         |
| Go to list view                | Selects the list view.                                                                                                                                                                                                                      | N                                         |
| Go to the first list view item | Selects the first item on the list view.                                                                                                                                                                                                    | SHIFT+F                                   |
| Go to header search box        | Moves the cursor to the header search box.                                                                                                                                                                                                  | R                                         |
| Go to footer                   | Moves the cursor to footer components.<br>Not supported for Microsoft® Internet Explorer® versions 7 or 8 or for right-to-left languages. If you choose the Macros or Presence component, press ESC to move the cursor to other components. | F/RIGHT ARROW or LEFT ARROW/1 through 9   |
| Move left                      | Moves the cursor left.                                                                                                                                                                                                                      | LEFT ARROW                                |
| Move right                     | Moves the cursor right.                                                                                                                                                                                                                     | RIGHT ARROW                               |
| Move up                        | Moves the cursor up.                                                                                                                                                                                                                        | UP ARROW                                  |
| Move down                      | Moves the cursor down.                                                                                                                                                                                                                      | DOWN ARROW                                |
| Open item in an inactive tab   | Opens the selected item in a new tab without shifting focus.                                                                                                                                                                                | CTRL+click for PCs;<br>CMD+click for Macs |
| Open drop-down button on tabs  | Opens the drop-down button on tabs to select more actions.                                                                                                                                                                                  | D                                         |
| Open tab                       | Opens a new tab.                                                                                                                                                                                                                            | T                                         |
| Close tab                      | Closes a selected tab.                                                                                                                                                                                                                      | C                                         |
| Reopen last-closed tab         | Reopens the last-closed primary tab.                                                                                                                                                                                                        | SHIFT+C                                   |

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

| Action (Keyboard Shortcut)     | Description                                                                                        | Key Command       |
|--------------------------------|----------------------------------------------------------------------------------------------------|-------------------|
| Refresh tab                    | Refreshes a selected tab.                                                                          | SHIFT+R           |
| Enter                          | Activates a command.                                                                               | ENTER             |
| Get link to share              | Opens the Link to Share dialog box on the selected tab.                                            | U                 |
| Show keyboard shortcuts        | Opens an overlay that lists keyboard shortcuts.                                                    | SHIFT+K           |
| Edit                           | Switch from detail to edit page.                                                                   | E                 |
| Save                           | Saves changes to the selected tab.                                                                 | CTRL+S            |
| Hide or show pinned list       | Toggles the appearance of a pinned list.                                                           | SHIFT+N           |
| Hide or show left sidebar      | Toggles the appearance of the left sidebar and any of its components.                              | SHIFT+LEFT ARROW  |
| Hide or show right sidebar     | Toggles the appearance of the right sidebar and any of its components.                             | SHIFT+RIGHT ARROW |
| Hide or show top sidebar       | Toggles the appearance of the top sidebar and any of its components.                               | SHIFT+UP ARROW    |
| Hide or show bottom sidebar    | Toggles the appearance of the bottom sidebar and any of its components.                            | SHIFT+DOWN ARROW  |
| Zoom in or out on primary tabs | Zooms in or out on primary tabs by toggling the appearance of the header, footer, and pinned list. | Z                 |

## Guidelines for Working with Salesforce Console Multi-Monitor Components

Move portions of a console to different areas of your computer screens so that you can view data in ways that help you work best.

After an administrator turns on multi-monitor components, you can pop out and drag primary tabs and Open CTI SoftPhones to other locations on your screens. You can also move the History component, Live Agent chats (but not the footer component), and any custom console components or Force.com Canvas components in a console's footer. To use multi-monitor components, you might need to update your browser's settings to: (1) allow popup windows; (2) open links in windows, not tabs.

To pop out and drag primary tabs, click  and select **Pop out primary tabs**. To return primary tabs to their original browser, click  and select **Pop tabs back into console**.

To pop out and drag components in a console's footer, click the items and select . To return items to their original browser, click . To refresh a popped out footer component, right-click on it and choose **Reload** or **Refresh**. When you refresh a popped out footer component, it's returned to the console's footer.

If pinned lists are set up, a playground appears as a blank area next to lists and it says **Drag Footer Components Here**. Use this area to keep track of Salesforce windows among several applications on your screens.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

 **Important:** Popped out items close and lose their positions on your screens when you: (1) log out of Salesforce; (2) click **Setup**; (3) click a link to leave a console; (4) refresh or close your browsers.

 **Note:** You can't pop out SoftPhones built with versions 3.0 or 4.0 of the CTI Toolkit.

 **Tip:** Any items popped out of the console have blue headings to help you locate them among other windows on your screens. To use keyboard shortcuts from popped out components, focus on the correct window. For example, if you're focused on a window with the navigation tab, the default shortcut to go to primary tabs, key command P, won't work.

## Add Notes to Records in a Salesforce Console

The interaction log helps you quickly add notes to records on a console's primary tabs.

If you're assigned to an interaction log layout, you can access the log from a console's footer. Logs appear on items that have an Activity History related list, such as accounts and contacts, but not solutions. Logs aren't available for reports, dashboards, Salesforce CRM Content, the Article Management tab, or Visualforce pages.

To show or hide the interaction log, hover over the log's border and click  or . To resize the interaction log and a detail page, drag the bar in between them. To help you quickly save notes on customers, when a contact appears on a subtab, the contact's name is added to the log's `Name`. However, you can change the `Name` before you save a log. When you click **Clear Log** to remove notes or a `Subject`, any saved notes aren't removed—they're stored on the record's Activity History related list. For easy review and retrieval, all logs are saved as tasks on records' Activity History related list.

 **Note:** Administrators can customize the fields that appear on logs.

 **Tip:** If you use a SoftPhone, click **Add Call Data** to add a call's date and time to the log. When screen popup windows appear from inbound calls, click **End Call** to end the call and save any updates that you've made to the log.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view the interaction log:

- "Read" on tasks

To save notes in the interaction log:

- "Edit" on tasks

## View Push Notifications in a Salesforce Console

Push notifications are visual indicators that appear when a record or field you're viewing was changed by others.

After an administrator configures push notifications, visual indicators for record or field changes appear on lists and detail pages. When changes happen, detail pages automatically refresh and show updates, or notifications appear as dialog boxes. Lists display notifications as:

### EDITIONS

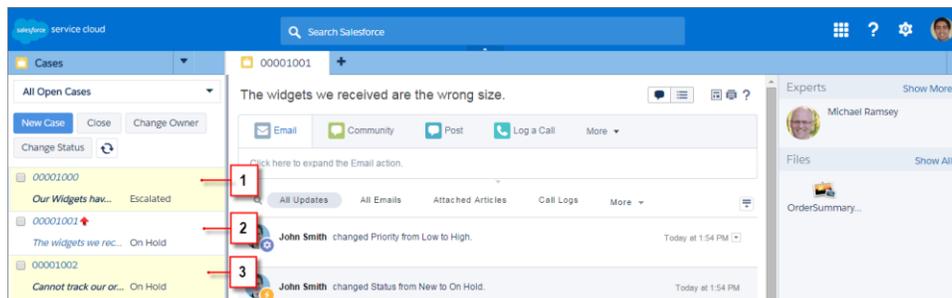
Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### Push Notifications for Lists



(1) Yellow when a record changes. (2) Blue if it's the last item you viewed. (3) Bold and italic when a field specified by an administrator changes.



**Note:** These objects and their fields are available for push notifications: accounts, contacts, cases, leads, opportunities, campaigns, tasks, and custom objects.

## Use a SoftPhone with a Salesforce Console

A SoftPhone in a console lets you view records related to phone calls, as well as receive, place, and transfer calls.

You can access a SoftPhone if you're assigned to a call center using a CTI adapter built with version 3.0 or 4.0 of the CTI Toolkit, or if you're using a call center built with Open CTI.

Click  to display a SoftPhone from the footer of a console. Use the interaction log to write notes in call logs. A call log is an activity record that automatically generates when you use a SoftPhone, and it tracks the phone number, caller, date, time, and duration of the call. You can view call logs in the Activity History related list of any record associated with the call.

 **Important:** Data might not save properly when you: (1) Refresh your browser during a call; (2) use a SoftPhone in multiple browsers simultaneously; (3) switch to a SoftPhone in a browser without a console.

 **Note:** If you're using a CTI adapter built with version 4.0 of the CTI Toolkit,  displays in the footer even when you're not connected to the adapter.

 **Tip:** You can hide the SoftPhone by clicking , but you can't move it away from the footer of a console. You can also resize the height of a SoftPhone by dragging the bar on top of it. When you click **End Call**, any updates you've made to the interaction log are saved before the call ends.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view and use the SoftPhone:

- Member of a call center

## Find Knowledge Articles in a Salesforce Console

If Salesforce Knowledge and the Knowledge sidebar is set up by an administrator, articles automatically appear when you select a case in a console.

To help you solve cases faster, suggested articles appear in the sidebar as you type details into a case's `subject`. Only articles updated within the last 30 days appear, but you can view older articles by specifying a search term or filtering search results. To filter articles by a specific category, language, or validation status, click  and choose filter options. To access these filters, validation status and multilingual articles must be enabled. An administrator determines which languages are available for articles. The columns available in the sidebar are `New`, `Article Title`, and `Most Viewed`. You can drag the bar in between the columns to resize them, but you can't add, remove, or rearrange columns.

To find articles to help you solve a case, click , type keywords into `Search`, and click **Go**. To attach an article to a case, click the checkbox next to the article and click **Attach to Case**. You can only attach an article to a saved case.  displays next to an article already attached to a case.

To change the number of articles displayed, click the article count indicator in the lower left corner of the sidebar and choose a setting. You can view 10, 25, 50, 100, or 200 articles at a time. When you change this setting, you return to the first page of the list.

To show or hide the sidebar, hover over the scrollbar and click  or . You can drag the bar in between the articles sidebar and a detail page to resize the width of either one.

### EDITIONS

Salesforce console available in Salesforce Classic and App Launcher in Lightning Experience. Setup for Salesforce console available in Salesforce Classic.

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

Available in: **Performance** and **Developer** Editions with the Sales Cloud

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud for an extra cost

### USER PERMISSIONS

To view Salesforce Knowledge articles:

- "Read" on the article's article type

To add Salesforce Knowledge articles to cases:

- "Edit" on cases

## Live Agent for Support Agents

Welcome to Live Agent for support agents! Live Agent is a comprehensive chat solution that makes it easy for you to support customers.

As a support agent, you assist dozens of customers with their support issues every day. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access all the information you need about your customers in a single workspace. In addition, Salesforce leverages the power of the Service Cloud, giving you access to important tools like a knowledge base and pre-defined support messages, that let you assist your customers and close cases more quickly.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to assist multiple customers at the same time with chat. Let's get started.

### IN THIS SECTION:

1. [Change Your Live Agent Status](#)  
Change your Live Agent status to control when you're available to receive new and transferred chats.
2. [Assist Customers with Chat](#)  
Use Live Agent chat in the Salesforce console to help customers with their issues with the support of robust customer service tools.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

## Change Your Live Agent Status

Change your Live Agent status to control when you're available to receive new and transferred chats.

In Live Agent, you can set your online status to online, away, or offline. When you exit Live Agent, your status automatically changes to offline and any active chat sessions end.

1. Click the Live Agent footer widget to open the chat monitor.
2. Click the drop-down arrow in the upper right corner of the chat monitor to view your status options.
3. Select your status.

### IN THIS SECTION:

[Live Agent Statuses](#)

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

## Live Agent Statuses

Live Agent statuses define how you can interact with customers while you're online, away, or offline.

| Status  | Description                                                                                                  |
|---------|--------------------------------------------------------------------------------------------------------------|
| Online  | You can receive and accept incoming chats and transfers.                                                     |
| Away    | You can continue any chat sessions you've already started, but you can't accept incoming chats or transfers. |
| Offline | You can't accept incoming chats or transfers, and no chats can be routed to you.                             |

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

## Assist Customers with Chat

Use Live Agent chat in the Salesforce console to help customers with their issues with the support of robust customer service tools.

Of course you can chat with customers using Live Agent, but using Live Agent in the Salesforce console gives you access to several other Service Cloud products that let you assist customers in a comprehensive way.

### IN THIS SECTION:

#### [Chat with Customers](#)

Accept incoming chat requests to begin chatting with customers.

#### [Access Customer Details during a Chat](#)

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

#### [Send Quick Text Messages in Chats](#)

Send pre-written messages to chat customers to send common messages more quickly.

#### [Transfer Files During a Chat](#)

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

#### [Transfer Chats](#)

There are several ways you can transfer chats to agents. Transfer a chat session to a specific agent, send a transfer request to all available agents with a particular skill, or send a transfer request to all agents who are associated with a particular chat button.

#### [Send a Chat Conferencing Request](#)

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.

#### [Attach Articles to Live Agent Chats](#)

Use the Knowledge One widget to find articles that help solve customer issues during chats.

#### [Attach Records to Chat Transcripts](#)

Search for or create records to attach to a chat transcript as you chat with customers.

#### [Request Help with a Chat](#)

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

#### [Block Unwanted Chat Customers](#)

You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

#### [End a Chat Session](#)

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

#### [View Customer Records](#)

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

### EDITIONS

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

## Chat with Customers

Accept incoming chat requests to begin chatting with customers.

When you receive a new chat or transfer request, the pending request appears in your chat monitor. You can see the deployment or website the chat came from, the customer's name (if it's available), and the number of minutes the request has been waiting to be answered.

You can chat with several customers at the same time. Each chat sessions opens in a separate primary tab.

1. In the chat monitor, click **Accept** on the chat request.  
The chat log opens in a new primary tab.
2. Type your message to the customer in the message field.
3. Click **Send** or hit ENTER on your keyboard to send your message to the customer.
4. Click **End Chat** when you're done assisting the customer.  
If the customer ends the chat first, a notice appears in the chat log.

### EDITIONS

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

## Access Customer Details during a Chat

When you accept a chat request, a details tab for that chat opens automatically. The details tab includes information about the visitor and lets you look up records related to the chat, such as contacts and cases.

- To search for a record, type a name in the relevant box in the Related Entities section of the page, then click . To associate a record you find to the chat, select it from the search results list and click **Save**.

In older organizations, you could access records and visitor details from the Related Entities panel during chats. However, starting with Summer '14, the Related Entities panel in the details tab isn't available for new Live Agent customers. Existing customers will continue to have access to the Related Entities panel.

- Once you associate an existing record to the chat, click the name of the record to open it in a new tab.
- To create a new record, click **New Case**, **New Lead**, **New Contact**, or **New Account**.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To search for and view a record:

- "Read" on the object
- AND
- "Create" on Live Chat Transcripts

To create a new record:

- "Create" on the object
- AND
- "Create" on Live Chat Transcripts

To edit a record:

- "Edit" on the object
- AND
- "Create" on Live Chat Transcripts

To delete a record:

- "Delete" on the object
- AND
- "Create" on Live Chat Transcripts

## Send Quick Text Messages in Chats

Send pre-written messages to chat customers to send common messages more quickly.

Quick Text lets you respond to customers more efficiently by letting you insert predefined messages, such as greetings or common troubleshooting steps, into your chat messages.

 **Note:** If you don't have access to Quick Text, contact your administrator.

1. While chatting with a customer, type ; in the message field.  
A list of Quick Text messages appears. The messages you've used most recently appear at the top of the list.
2. To see additional Quick Text messages that are available, type a word or phrase.  
A list of messages that include those words appears.
3. To see the title and full text of a message, click it once or highlight it using the arrow keys on your keyboard.  
The full message appears at the bottom of the Quick Text list.
4. To select a message and add it to your chat, double-click it or highlight it and hit ENTER on your keyboard.
5. To send the message, click **Send** or hit ENTER on your keyboard.

## Transfer Files During a Chat

Give customers the ability to upload and transfer files during a chat so they can easily share more information about their issues.

For example, if a customer is receiving an error when they try to complete a process, they can upload and transfer a screenshot of the error message to the agent.

Before a customer can upload a file, you must associate the chat with a record, such as a case or a contact. Since the chat transcript isn't created until you end the chat, you can't attach a customer's file directly to the transcript during the chat.

1. Click  to search for or create a record to attach to the chat.
2. Click the file transfer icon (  ).

 **Note:** A customer can't upload a file until you initiate the file transfer by clicking the file transfer icon. This helps prevent customers from uploading unsolicited or potentially dangerous files into the chat.

3. Select the record you chose in the first step to attach the transferred file to.  
The customer receives a prompt to upload their file to the chat window.
4. When the customer has sent the file through the chat, click the link in the chat log to view the file.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To access Quick Text while chatting with visitors in Live Agent:

- "Read" on Quick Text

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To use in the Salesforce console:

- "Live Agent" is enabled and set up
- AND
- Live Agent is set up in a Salesforce console app

## Transfer Chats

There are several ways you can transfer chats to agents. Transfer a chat session to a specific agent, send a transfer request to all available agents with a particular skill, or send a transfer request to all agents who are associated with a particular chat button.

You may need to transfer chat sessions to other agents if a customer has an issue another agent can solve, or because you need to pass along some of your chat sessions to accept new requests. When you transfer a chat to a skill group, it's available to all online agents with that skill, regardless of their capacities and how many active sessions they're already engaged in.

When an agent transfers a chat, any records attached to the chat transcript will open in the other agent's workspace when another agent accepts the chat. This way, the agent who accepts the transferred chat has all the information to start assisting the customer right away, without having to search for related records.

If an agent tries to transfer a chat, but has open records that are unsaved or unattached to the chat transcript, the first agent will be prompted to save those changes before completing the chat transfer. This way, the agent who accepts the transfer will see the most up-to-date details about the customer.

If the accepting agent does not have permission to view certain records or objects, those items will not open in the transferred workspace.

1. While chatting with a customer, click **Transfer**.
2. Choose the skill group or chat button queue to which you want to transfer the chat.



**Note:** You can transfer a chat to a skill group or a chat button queue, but not both.

3. Select All Qualified Agents to send the transfer request to all online agents in the skill group, or choose the name of a specific agent.
4. If the transfer is accepted, you don't need to do anything else. If it's rejected, you can try transferring it to a different agent or skill group.



**Warning:** When another agent accepts your transfer request, your chat workspace closes automatically, including the chat log and any related subtabs. Make sure to save any changes to these records before you transfer the chat, since any unsaved changes will be lost when the workspace closes.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

## Send a Chat Conferencing Request

As wise as support agents are, sometimes a single support agent doesn't have all the information that's required to solve a customer's problem. Chat conferencing lets you invite one or more agents into your customer chats. That way, your agents can turn boring chats into veritable support parties for your customers—all without disrupting the flow of conversation! Send a chat conferencing request to ask another agent to join you in a customer chat.

 **Note:** You can conference in a single agent, or send a request to all agents and the first to accept will join the conference. You can conference multiple agents into a chat, but you need to send each request individually.

1. While you're chatting with a customer, click .
2. Select the skill group of the agents that you want to transfer into the chat.
3. Select whether to send the conference request to all agents with that skill or to a specific agent.
4. Click **Conference** to send the conference request.

If the agent accepts the conference request, you see a notification in the chat log, and that agent can start chatting with you and the customer. If the agent declines the request, you see a notification above the chat log. The customer receives a notification when an agent joins or leaves a conference.

5. If you decide to exit the conference, click **Leave**, and then click **Leave** again.

If the other agent leaves the conference, you'll see a notification in the chat log.

Any saved and attached records will open for other agents who join the conference. But only the originating or longest-attending agent will be able to attach other records. If the longest-attending agent attaches or removes records during the conference, other agents won't see these changes in their workspaces.

For more about transferring chats and workspaces, see [Transfer Chats](#).

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To create and edit configurations:

- "Customize Application"

To enable chat conferencing:

- "Enable Live Agent Chat Conference"

## Attach Articles to Live Agent Chats

Use the Knowledge One widget to find articles that help solve customer issues during chats.

The Knowledge One widget is only available if your organization uses Knowledge and your administrator has included the tool in your Salesforce console app.

1. When chatting with a visitor, click an article from the list in the Knowledge One widget. A tab with the full text of the article opens.
2. To search for a specific article in the list, type a word or phrase in the text box in the widget and click  or press ENTER.
  - Alternatively, click  at the top of the widget to search all articles, including those not in the list. The main widget search gives you the option of limiting your results to specific types of articles.
  - To filter your search results, click **Filters** and choose how you want to restrict your search.
3. When you find the article you want, click , then click **Share**. The text of the article appears in the chat text box.
4. Click **Send** or press ENTER on your keyboard to send the article to the visitor.

 **Note:** You can only send articles to visitors if your administrator has set up a Chat Answer field on articles. If this field isn't set up, you can view articles but can't include them in chats.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To search for and view an article:

- "Read" on the article type

## Attach Records to Chat Transcripts

Search for or create records to attach to a chat transcript as you chat with customers.

Find existing records or create new ones to associate with a transcript as you chat with customers. For example, you can create a new case based on the customer's issue, or search for the customer's existing contact record and attach these records to the transcript for later reference. You can attach standard or custom records to your chat transcripts.

1. While chatting with a customer, click  to attach a record to the transcript.
  -  **Note:** You can only attach one of each type of record to a chat transcript. For example, you can't attach more than one case to a single transcript.
2. To search for an existing record:
  - a. Click the search icon (  ) in the records window next to the type of record you want to search for.
  - b. Type the name of the record and hit ENTER.  
The record opens in a new tab.
  - c. Click the attach icon (  ) again.
  - d. Select the check box next to the record you searched for to link it to the chat transcript.
3. To create a new record:
  - a. Click the create icon (  ) next to the type of record you want to create.
  - b. Complete the information in the new record and save it.  
The record will automatically link to the transcript once the record is created.
4. After you complete the chat with the customer, exit the chat.
5. If prompted, click **Save**.  
The records you linked are now attached to the transcript. You can access them from the transcript's detail view.

### EDITIONS

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To search for and view a record:

- "Read" on the object  
AND  
"Create" on Live Chat Transcripts

To create a new record:

- "Create" on the object  
AND  
"Create" on Live Chat Transcripts

To edit a record:

- "Edit" on the object  
AND  
"Create" on Live Chat Transcripts

To delete a record:

- "Delete" on the object  
AND  
"Create" on Live Chat Transcripts

## Request Help with a Chat

When you need help with a chat, you can raise a virtual flag to alert a supervisor. Supervisors are alerted that you need help, and they can respond directly via the console.

1. In the interaction pane, click the  icon.
2. Enter a message briefly explaining what help you need.
3. Click **Raise Flag**.

Either you or a supervisor can lower the flag when your issue is resolved.

If you don't see the  icon in your console, contact your Salesforce administrator to enable it.

## Block Unwanted Chat Customers

You can block chats from troublesome customers right from the Salesforce console. For example, if a customer is using abusive language or sending spam messages, you can block that user from starting a new chat.

Blocking a chat ends the chat and blocks any new chat requests coming from that user's IP (Internet Protocol) address.

If your organization is receiving many spam chats from a particular region, your administrator can block entire ranges of IP addresses.

1. In the interaction pane, click the  icon.
2. (Optional) Enter a comment explaining why you're blocking this visitor.
3. Click **Block**.

When you click **Block**, you immediately end the chat, and the visitor sees a notification that an agent ended the chat. If multiple agents are engaged in a conference, **Block** immediately ends the conference, and the other agents are also notified.

If you don't see the  icon in your console, contact your Salesforce administrator to enable it. Only an administrator can unblock an IP address.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

## End a Chat Session

End a chat session after you've finished chatting with a customer and updating the records related to their chat.

After you end a chat with a customer, the primary and secondary tabs related to that chat remain open in your console. Close them to save your work and free up space to take on more chats.

1. Close the primary tab for the chat.
2. If prompted, click **Save**.

## View Customer Records

Salesforce automatically creates some records when a chat ends. These records store information about chat customers and their interactions with agents.

These records are mostly used internally to provide an audit trail about your customers and their chats with agents. However, you can access these records yourself if you ever need them.

1. To access customer records in the Salesforce console, select the type of record you want to view from the Salesforce console navigation list.  
A list of those records will appear in the main window.

### IN THIS SECTION:

#### [Live Agent Session Records](#)

Every time your agents log into Live Agent, a Live Agent session record is automatically created. These session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers.

#### [Live Agent Visitor Records](#)

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

#### [Live Agent Transcripts](#)

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the :

- Live Agent is enabled, set up, and included in a app

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To view customer records:

- "Read" on the record type

For agents to use Live Agent:

- "API Enabled" administrative permission

### Live Agent Session Records

Every time your agents log into Live Agent, a Live Agent session record is automatically created. These session records store information about your agents' and customers' interactions online, such as how many chat requests were processed, how long agents spent online, or how long agents were actively engaged in chats with customers.

Use Live Agent sessions to find and edit information about your support agents' chats with customers. For example, you can create a list called "Today's Sessions" to view chat activity that occurred in one day.

You can associate session records with cases, accounts, contacts, and leads or link them with other objects through custom lookup fields.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete session records, just like other record types in Salesforce. However, session records are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

### Live Agent Visitor Records

Every time an agent chats with a customer, Salesforce automatically creates a visitor record that identifies the customer's computer.

Each new visitor is associated with a session key, which Salesforce creates automatically. A session key is a unique ID that is stored in the visitor record and on the visitor's PC as a cookie. If a customer participates in multiple chats, Salesforce uses the session key to link the customer to their visitor record, associating that record to all related chat transcripts.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete visitor records, just like other record types in Salesforce. However, visitor records are meant to provide a paper trail that associates your customers with their chat transcripts, so we don't recommend tampering with these records in most cases.

### Live Agent Transcripts

A Live Agent transcript is a record of a chat between a customer and an agent. Salesforce automatically creates a transcript for each chat session.

When a chat ends successfully—that is, when the chat is ended by a customer or an agent—the chat transcript is created as soon as the agent closes the chat window and any related tabs.

If a chat is disconnected or experiences another error, Salesforce still creates a chat transcript for it, though it takes up to 30 minutes to create the transcript after the chat is disconnected.

You can associate a transcript with cases, accounts, contacts, and leads, or you can link it to other objects.

 **Note:** If you have the correct permissions, you can create, view, edit, or delete chat transcripts, just like other record types in Salesforce. However, chat transcripts are meant to provide a paper trail for the chats between your agents and customers, so we don't recommend tampering with these records in most cases.

#### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

#### EDITIONS

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#### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

## IN THIS SECTION:

[Live Agent Transcript Fields](#)

Live Agent transcript fields help you track information about your agents' chats with customers.

[Live Chat Transcript Events](#)

Live chat transcript events automatically track events that occur between your agents and customers during chats.

**Live Agent Transcript Fields**

Live Agent transcript fields help you track information about your agents' chats with customers.

A Live Agent transcript has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields might not be visible or editable.

| Field                       | Definition                                                                                                                                                                 |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Abandoned After             | The amount of time in seconds an incoming chat request went unanswered by an agent before the chat was disconnected by the customer                                        |
| Account Name                | The name of the account associated with the transcript                                                                                                                     |
| Agent Average Response Time | The average time that it took an agent to respond to a chat visitor's message                                                                                              |
| Agent Maximum Response Time | The maximum time it took an agent to respond to a chat visitor's message                                                                                                   |
| Agent Message Count         | The number of messages an agent sent during the chat                                                                                                                       |
| Agent Skill                 | The skill associated with the live chat button used to initiate the chat                                                                                                   |
| Body                        | The transcribed chat between an agent and a visitor                                                                                                                        |
| Browser                     | The type and version of the browser used by the visitor                                                                                                                    |
| Browser Language            | The visitor's browser language selection                                                                                                                                   |
| Case                        | The case associated with the chat                                                                                                                                          |
| Chat Button                 | The chat button that the visitor clicked to initiate the chat                                                                                                              |
| Chat Duration               | The total duration of the chat in seconds                                                                                                                                  |
| Contact Name                | The name of the contact that participated in the chat<br><br>Note that contacts and visitors are not the same. See <a href="#">Live Chat Visitor</a> for more information. |

**EDITIONS**

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

| Field                | Definition                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Created By           | The user who created the transcript, including creation date and time (Read only)                                                                                                                                                                                                                                                                                                                                              |
| Created Date         | The date and time the transcript was created (Read only)                                                                                                                                                                                                                                                                                                                                                                       |
| End Time             | The time the chat ended                                                                                                                                                                                                                                                                                                                                                                                                        |
| Ended By             | Indicates whether the visitor or the agent ended the chat                                                                                                                                                                                                                                                                                                                                                                      |
| Last Modified By     | The user who last modified the transcript, including date and time (Read only)                                                                                                                                                                                                                                                                                                                                                 |
| Last Modified Date   | The date and time the transcript was last modified (Read only)                                                                                                                                                                                                                                                                                                                                                                 |
| Lead                 | The name of the lead that was generated by the chat or discussed during the chat                                                                                                                                                                                                                                                                                                                                               |
| Deployment           | The deployment from which the visitor initiated the chat                                                                                                                                                                                                                                                                                                                                                                       |
| Live Chat Transcript | <p>Unique, numerical identifier automatically assigned to the transcript.</p> <p>Administrators can modify the format and numbering for this field. Transcript numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.</p>                                                                                                                                                                   |
| Live Chat Visitor    | <p>Unique, numerical identifier automatically assigned to the visitor. Administrators can modify the format and numbering for this field. Visitor numbers usually increase sequentially, but sometimes they can skip numbers in a sequence.</p> <p>Note that visitors and contacts are different: a visitor might be a contact, but this is not a requirement, and there is no relationship between contacts and visitors.</p> |
| Location             | The visitor's geographic location. Either the city and state, or city and country (if the visitor is located outside of the United States)                                                                                                                                                                                                                                                                                     |
| Owner                | <p>The name of the transcript owner. By default, the owner is the user who originally created the transcript (for example, the agent who answered the chat).</p> <p>You can select a different user as the owner, or assign the transcript to a queue. When assigning transcripts to other users, make sure those users have the "Read" permission on live chat transcripts.</p>                                               |
| Platform             | The user's operating system                                                                                                                                                                                                                                                                                                                                                                                                    |
| Referring Site       | <p>Site the visitor was on before they came to your website.</p> <p>For example, if the visitor used Google to search for your organization's website, the referring site is Google.</p>                                                                                                                                                                                                                                       |
| Request Time         | The time that the visitor initially requested the chat                                                                                                                                                                                                                                                                                                                                                                         |

| Field                         | Definition                                                                         |
|-------------------------------|------------------------------------------------------------------------------------|
| Screen Resolution             | The screen resolution used by the visitor                                          |
| Start Time                    | The time that the agent answered the chat request                                  |
| Status                        | Completed or Missed. A missed chat was requested but not answered                  |
| User Agent                    | A string that identifies the type of browser and operating system the visitor used |
| Visitor Average Response Time | The average time that it took a visitor to respond to an agent comment             |
| Visitor Maximum Response Time | The maximum time it took a customer to respond to an agent's message               |
| Visitor IP Address            | The IP address of the computer that the visitor used during the chat               |
| Visitor Message Count         | The number of messages a visitor sent during the chat                              |
| Wait Time                     | The total amount of time a chat request was waiting to be accepted by an agent     |

### Live Chat Transcript Events

Live chat transcript events automatically track events that occur between your agents and customers during chats.

You can edit live chat transcripts to track events that occur between your agents and customers during live chats. You can add the following events to a live chat transcript:

| Event                            | Description                                                                                    |
|----------------------------------|------------------------------------------------------------------------------------------------|
| Chat Requested                   | Visitor requested a chat                                                                       |
| Queued                           | Chat request was placed in queue                                                               |
| Routed (Push)                    | Chat request was routed to agent                                                               |
| Routed (Choice)                  | Chat request was routed to all available, qualified agents                                     |
| Accepted                         | Chat request was accepted by agent                                                             |
| Critical Wait Alert Time Reached | Agent failed to respond to the customer's message before reaching the critical wait alert time |
| Critical Wait Alert Cleared      | Agent responded to the customer's message after the critical wait alert was received           |
| Transfer Requested               | Agent requested chat transfer                                                                  |
| Transfer Accepted                | Chat transfer was accepted by agent                                                            |
| Transfer Request Canceled        | Chat transfer request was canceled by the agent who sent the request                           |

### EDITIONS

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

| Event                             | Description                                                              |
|-----------------------------------|--------------------------------------------------------------------------|
| Transfer Request Declined         | Chat transfer request was declined by the agent who received the request |
| Transferred to Button             | Chat was transferred to a button                                         |
| Transfer to Button Failed         | Chat transfer to button was unsuccessful                                 |
| Chat Conference Requested         | Agent sent a request to start a conference                               |
| Chat Conference Canceled          | Conference request was canceled                                          |
| Chat Conference Declined          | Conference request was declined by an agent                              |
| Agent Joined Conference           | An agent joined the conference                                           |
| Agent Left Conference             | An agent left the conference                                             |
| File Transfer Requested           | A file transfer was requested                                            |
| File Transfer Canceled by Agent   | File transfer was canceled by an agent                                   |
| File Transfer Canceled by Visitor | File transfer was canceled by the visitor                                |
| File Transfer Succeeded           | File transfer was successful                                             |
| File Transfer Failed              | File transfer failed                                                     |
| Canceled (Blocked)                | An attempted chat was blocked via an IP blocking rule                    |
| Blocked by Agent                  | An agent blocked an active chat (creating an IP blocking rule)           |
| Declined (Manual)                 | Chat request was declined by agent                                       |
| Declined (Time-Out)               | Chat request timed out while assigned to agent                           |
| Canceled (No Agent)               | Chat request was canceled because no qualified agents were available     |
| Canceled (No Queue)               | Chat request was canceled because there was no room in queue             |
| Canceled by Visitor               | Visitor clicked <b>Cancel Chat</b>                                       |
| Agent Left                        | Agent left chat                                                          |
| Visitor Left                      | Visitor left chat                                                        |
| Ended by Agent                    | Agent clicked <b>End Chat</b>                                            |
| Ended by Visitor                  | Visitor clicked <b>End Chat</b>                                          |
| Other                             | Another event occurred                                                   |

## Live Agent for Support Supervisors

Welcome to Live Agent for support supervisors! Live Agent is a comprehensive chat solution that makes it easy for your agents to support customers. With Live Agent's supervisor tools, you can easily monitor your agents' activities, assist your agents in chats, and view data on your agents' chat sessions.

As a support supervisor, you oversee your employees to ensure that they provide the best customer support possible. Live Agent is a chat solution that's fully integrated with the rest of Salesforce, making it easy for you to access the information you need about your agents and their chat activity in a single workspace.

Whether you're a seasoned veteran or new to Live Agent, there are several tools at your disposal that make it easy to support and monitor your chat agents as they work with customers. Let's get started.

### IN THIS SECTION:

#### [The Live Agent Supervisor Panel](#)

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

#### [Assign Skills to Agents](#)

Assign skills to your agents as the expertise of your team evolves.

#### [Report on Live Agent Sessions](#)

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

## The Live Agent Supervisor Panel

The Live Agent supervisor panel is your one-stop shop to find information about your department's chat buttons and chat agents. From the supervisor panel, you can monitor agents' chat activities as they chat with customers and view customer traffic on specific chat buttons, all in real time. The supervisor panel is conveniently located in the Salesforce console, so it's easy to access it without switching out of the app.

### IN THIS SECTION:

#### [Access the Supervisor Panel](#)

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

#### [Agent Status List](#)

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

#### [Queue Status List](#)

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To chat with visitors in Live Agent in the Salesforce console:

- Live Agent is enabled, set up, and included in a Salesforce console app

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

## Access the Supervisor Panel

Access the supervisor panel conveniently from the Salesforce console to easily monitor your agents' chat activity.

- To access the supervisor panel in the Salesforce console, select **Live Agent Supervisor** in the console's navigation list.  
The supervisor panel appears in the main console window, giving you access to real-time information about your organization's chat buttons and agents.

## Agent Status List

The agent status list in the supervisor panel gives you access to real-time information about your agents' chat activity.

| Agent Detail          | Description                                                                                                                                                                                                                                      |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Name            | The name of the agent.<br> <b>Note:</b> If a red flag appears next to the name, the agent has requested help. Respond via the chat detail module (far right). |
| Status                | The agent's Live Agent status.                                                                                                                                                                                                                   |
| Action                | The actions you can take to change the agent's status.                                                                                                                                                                                           |
| No. Chats in Progress | The number of chats that an agent is engaged in.                                                                                                                                                                                                 |

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

| Agent Detail                     | Description                                                                   |
|----------------------------------|-------------------------------------------------------------------------------|
| No. Requests Assigned            | The number of pending chat requests that are currently assigned to the agent. |
| Time Elapsed Since Login         | The amount of time the agent has been logged in to Live Agent.                |
| Time Elapsed Since Last Accept   | The amount of time since the agent last accepted a chat request.              |
| Message to Supervisor (optional) | The private message that the agent sent with a help flag.                     |

Expand each agent's name to see details about the customers they're chatting with.

| Customer Detail | Description                                                                         |
|-----------------|-------------------------------------------------------------------------------------|
| Visitor Name    | The name of the customer, if available.                                             |
| IP              | The IP address of the customer's device.                                            |
| Network         | The customer's network, if available.                                               |
| Browser         | The type of internet browser the customer is using to connect to their chat window. |
| City            | The city the customer is chatting from.                                             |
| Country         | The country the customer is chatting from.                                          |
| Duration        | The amount of time the customer has been engaged in a chat with the agent.          |
| Action          | The actions you can take to view the customer's chat with the agent.                |

## Queue Status List

The queue status list in the supervisor panel gives you access to real-time information about your organization's chat buttons and queues.

| Queue Detail | Description                                                                        |
|--------------|------------------------------------------------------------------------------------|
| Button Name  | The name of the chat button.                                                       |
| ID           | The unique Salesforce ID of the chat button.                                       |
| Queue Length | The number of chats that are waiting to be assigned to an agent.                   |
| Longest Wait | The longest amount of time a customer chat has waited to be connected to an agent. |

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

## Monitor Your Agents' Chats

View your agents' chats from the supervisor panel as they help customers. You can monitor agents' performance and give them real-time feedback and help as they serve customers.

1. In the Agent Status list, click  to expand the information about the agent whose chat you want to view. If an agent has requested help, you see a red flag next to the name and a private message (far right) if the agent entered one.
2. To view a chat, click **View** in the Action column of the chat you want to monitor.  
The chat monitor opens in the Agent Status list.
3. To send a private message to an agent as the agent is chatting with a customer, type your message in the message field and press **Enter**.

The agent can see your message in the chat log, but the message is invisible to the customer.

When you finish monitoring your agent's chat, click  again to collapse the chat monitor.

To remove a flag after you've provided help, click **Lower Flag**.

### EDITIONS

Available in: **Salesforce Classic**

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To use the Live Agent supervisor panel in the Salesforce console:

- Access to the Live Agent supervisor tab in a user profile or permission set, and included in a Salesforce console app

To view agents' chats:

- "Agent Sneak Peek Enabled" in your Live Agent configuration

To send whisper messages to agents:

- "Whisper Messages Enabled" in your Live Agent configuration

## Assign Skills to Agents

Assign skills to your agents as the expertise of your team evolves.

1. In Setup, enter *skills* in the **Quick Find** box, then select **Skills**.
2. Click the name of the skill you want to assign.
3. Click **Edit**.
4. Select either the profiles (recommended) or individual users who have this skill.
5. Click **Save**.

If you don't have access to the Skills page, ask your Salesforce administrator about enabling this permission. Only your administrator can create skills.

## Report on Live Agent Sessions

Gain insight into your agents' chat activities by building reports about Live Agent chat sessions.

You can create a custom report type for Live Agent chat sessions and use it to run reports on your agents' sessions using the Report Builder. These Live Agent session reports can provide insight about your agents' chat activities—for example, whether or not your agent team is able to handle all chat requests from your customers.

1. Create a custom report type using Live Agent Sessions as the primary object.
2. Create a new Live Agent report using the Report Builder.
3. Customize your report to include the columns of information you want to feature.
4. Save or run the report.

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To assign skills:

- "Assign Live Agent Skills to Users"

### EDITIONS

Available in: Salesforce Classic

Live Agent is available in: **Performance** Editions and **Developer** Edition organizations that were created after June 14, 2012

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"
- AND
- "Report Builder"

# Console Tab

## Agent Console

The Agent console in the console tab makes it easier to find related information with less switching between pages.

 **Note:** As of the Spring '15 release, Agent console is not available to new organizations.

The newer Salesforce console improves the Agent console by providing you with more options and more advanced technologies. See [Salesforce Console](#).

You can set up the Agent console to display the information most important to your work according to your business needs. Before setting up or using the Agent console, review [Agent console terminology](#).

### SEE ALSO:

[Agent Console FAQ](#)

[Displaying the Agent Console](#)

[Navigating within the Agent Console](#)

[Tip sheet: Using the Console](#)

## Agent Console Concepts

Review the following terminology used to describe the components of the Agent console:

### Frames

Separate sections of the console, each displaying a different record, list view, or other page.

### List View

The console's top frame, which is a list view of records based on specific criteria. The list views you can select to display in the Console tab are the same list views defined on the tabs of other objects. You cannot create a list view within the console.

### Detail View

The Agent console's center frame, which is the detail page view of any record selected from any of the console's other frames. The detail view displays the same page layouts defined for the object's detail pages. When a record is displayed in the detail view, it is highlighted in the list view.

### Mini View

The Agent console's right frame which displays the records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. The mini view does not display if the record in the detail view does not have any records associated with it.

### Sidebar

The Agent console's left frame, which displays recent items, the Recycle Bin, and other components, just like the sidebar displayed on every Salesforce page. To show or hide the sidebar in the console, click the border of the left frame.

### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### Related Objects

Objects chosen by an administrator to display in the Agent console's mini view when records of a particular type are shown in the console's detail view. For example, when a case is in the detail view, an administrator can choose to display an associated account, contact, or asset in the mini view.

### Mini Page Layouts

A subset of the items in a record's existing page layout that administrators choose to display in the Agent console's Mini View and in Hover Details. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from the page layout.

### Console Layout

Objects chosen by an administrator to display in the list view frame of the Agent console. For example, if an administrator adds cases to a console layout, then users whose profiles are assigned to that console layout can see list views of cases in the console's list view frame.

SEE ALSO:

[Agent Console](#)

[Displaying the Agent Console](#)

[Navigating within the Agent Console](#)

[Tip sheet: Using the Console](#)

## Navigating within the Agent Console

What you click in the Agent console determines which frame a record displays in.

### In the detail view, clicking:

- Buttons or links on the record displays the record in the detail view.
- **Email this page** (✉) displays a link to the record in an email.
- **Link to this page** (🔗) displays the record and the URL of the record in a new browser window.
- **Printable View** (🖨) displays a printable view of the record in a popup window.
- **Customize Page** (🔧) allows you to customize the display of related lists in the detail view of the record.
- **Help for this page** (🗉) displays an online help page for the record.

### In the mini view, clicking:

- Links displays the record in the detail view. Associated records display in the mini view.
- **View** displays the entire record in the detail view.
- **Edit** displays a mini edit page in the mini view.

To edit a field not displayed on the mini edit page, click **View** to display the entire record in the detail view, and then click **Edit** from the detail view.

- **Show more** below a related list displays more of the records included in the related list in the mini view. **Show more** displays an additional five records every time you click it, up to a maximum of 100.

 **Note:** The mini view does not display if the record in the detail view does not have any records associated with it.

### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

**In the list view, clicking:**

- A link displays the record in the detail view.
- **Refresh** reloads the list view with any updates that have occurred to the records since you began viewing the list.
- A column heading sorts that column in ascending order. Click the heading a second time to sort in descending order.
- A letter at the bottom of the list view filters your list view records by the letter.
- **fewer** or **more** at the bottom of the list view displays a shorter or longer list.
- **Previous Page** or **Next Page** at the bottom of the list view displays the previous or next page of items on the list.
- For more information, see [Using the Agent Console List View](#).

**In the sidebar, clicking:**

- The border of the left frame opens the sidebar in the console. Click the border of the left frame a second time to hide the sidebar.
- A record under **Recent Items** displays the record in the detail view.
- **Calendar** displays the calendar in the detail view.
- **Recycle Bin** displays the Recycle Bin in the detail view.



**Tip:** Clicking the back or forward buttons on your browser cycles you through pages in the console. You will not immediately exit the console by clicking them.



**Note:** Not all pages open within the console. For example, clicking **Printable View**, **Check Spelling**, **Help for this Page**, lookup icons, email addresses, and custom links set to open in a new browser window all open outside of the console in a new browser window or popup.

Drag-and-drop editing is not available for calendar views in the Agent console.

## SEE ALSO:

[Agent Console FAQ](#)

[Agent Console](#)

[Agent Console Concepts](#)

[Displaying the Agent Console](#)

[Using the Agent Console List View](#)

[Tip sheet: Using the Console](#)

## Displaying the Agent Console

You can start using the Agent console after your administrator has set it up as described in Agent Console.

To display the Agent console, click the Console tab. To exit the console, select any tab.

No data displays in the console if the selected list view does not contain any records.

 **Note:** You can only access the Agent console if your administrator has assigned your user profile to a console layout and granted you access to the Console tab. You can customize your display to make the Console tab visible in your tab sets.

### SEE ALSO:

[Agent Console FAQ](#)

[Agent Console](#)

[Navigating within the Agent Console](#)

[Tip sheet: Using the Console](#)

## Using the Agent Console List View

The Agent console's list view allows you to quickly perform actions within Salesforce without leaving the console.

### Display list views

From the drop-down list in the top left of the list view frame, select an object, and then a list view of the object to display in the console's list view frame. You cannot create a list view within the console.

Click **Refresh** to reload the list view with any updates that have occurred to the records since you began viewing the list. The refresh button automatically changes colors when record updates have occurred.

Records italicize in the list view when you edit them in the detail view. This shows you the records you have edited.

### Search

Enter keywords in the search box above the list view and click **Go!** to use advanced search across all the searchable records you can access in your organization. Terms in an advanced search are treated as separate words rather than a phrase and can be found in different indexed fields within a record. So, searching for *Pat Powers* in advanced search will find a contact named "Pat P Powers," as well as a contact named "Pat Smith" with an email address of "smith@powers.com.". Search results display in the detail view.

### Create records

From the New drop-down list, select any object to create a new record. New record pages display in the detail view.

### View recent items

From the Recent Items drop-down list, you can choose to display any of the 10 records you most recently viewed. Recent items display in the detail view.

### Perform mass actions

Select the checkbox next to items in the list view, and from the Mass Action drop-down list, choose the action you want to perform on all the selected records.

### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

#### Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

#### Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

If you perform a mass action on more than 200 records while using Internet Explorer, you might be automatically logged out of Salesforce.

 **Note:** No data displays in the console if the selected list view does not contain any records.

SEE ALSO:

[Agent Console](#)

[Agent Console Concepts](#)

[Displaying the Agent Console](#)

[Navigating within the Agent Console](#)

[Tip sheet: Using the Console](#)

## Agent Console FAQ

- [How is the Console tab different from other tabs in Salesforce?](#)
- [How do I view the Agent console?](#)
- [Why do I only see the list views of certain objects in the Agent Console?](#)
- [Can I view more than one Agent console?](#)
- [Is the Agent console the same thing as the Salesforce console?](#)

### How is the Console tab different from other tabs in Salesforce?

The Console tab is just like other tabs in Salesforce except that the console can display records from several different Salesforce tabs all on one Console tab. This specialized display is called the Agent console, and it allows you to have all the information you need on one tab when interacting with Salesforce. By using the Agent console in the Console tab, you can quickly find, view, and edit records, such as cases, accounts, and contacts, with fewer clicks and without switching back and forth between screens.

SEE ALSO:

[Agent Console FAQ](#)

### How do I view the Agent console?

You can view the Agent console by clicking the Console tab. You can only access the Agent console if your administrator has assigned your user profile to a console layout and granted you access to the Console tab. You can customize your display to make the Console tab visible in your tab sets.

SEE ALSO:

[Agent Console FAQ](#)

#### EDITIONS

Agent console available in Salesforce Classic. Setup for Agent console available in Salesforce Classic and Lightning Experience.

Available in:

- Professional
- Enterprise
- Performance
- Unlimited
- Developer

## Why do I only see the list views of certain objects in the Agent Console?

The list views of objects you can display in the Agent console are defined by your administrator in the console layout assigned to your user profile.

SEE ALSO:

[Agent Console FAQ](#)

## Can I view more than one Agent console?

No. You can only view one Agent console. However, your administrator can customize many different Agent console layouts to display a variety of objects in the Agent console's list view, and then assign those console layouts to different user profiles to satisfy business needs for different users.

SEE ALSO:

[Agent Console FAQ](#)

## Is the Agent console the same thing as the Salesforce console?

No. The Salesforce console improves on the Agent console by providing you with more advanced options and technologies.

SEE ALSO:

[Agent Console FAQ](#)

## Using Social Customer Service

### Social Action Tips

An agent can use the social action to respond to customer cases or leads publicly and through direct messages.

Once an administrator has enabled social customer service and assigned social handles, agents can use the social action to send comments, retweets, replies and direct messages to social customers and social leads. The fields on the social action are optional. However, we recommend at least these fields.

| Field                  | Description                                                                                                                                                                        |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| In Reply To            | The social post you are replying to and its content. Use the Reply, Retweet, and Comment links in the feed to add content to a specific item in the feed.                          |
| Managed Social Account | You must have access to the managed social account by a profile or permission set. Use the drop-down to change to another account you have access to.                              |
| Message Type           | By default the message type is set to Reply for inbound posts. Use the drop-down to change to another valid message type.                                                          |
| Content                | All outbound content must be unique for the interaction, you can't send the same content in the same conversation. All Twitter replies must start with a handle: @[social handle]. |

If your posts require approval before they are sent, you can click **Submit for Approval** to start the review process. You can **Recall** it before it is approved or rejected. If a post is rejected you can **Retry** a rewritten post. When your post is approved, it is automatically published.

Here are some tips for working with social networks.

- If Quick Text is enabled, agents can create ready-to-send responses to social customers. See [Enable Quick Text and Create Quick Text Messages](#).
- URLs in a social post are turned into clickable links.
- When deleting posts, consider that Twitter Direct Messages behave like to emails. For example, the sender can delete their direct message from a conversation view. However, receiver has that direct message in their conversation view until they choose to delete it.
- Speaking of Twitter Direct Messages, Twitter has a preference to "Receive Direct Messages from Anyone". Therefore, depending on if this permission is set on your or the recipient's account, you may not have to be following each other to direct message.
- Agents can use the **View Source** link to go to the original post within its social network.
- In Salesforce1, agents can see and reply to social content from mobile devices.

#### EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

#### USER PERMISSIONS

To send and receive social media posts or messages:

- "Social Objects"
- AND
- "Social Publisher"
- AND
- Case Feed enabled
- AND
- Social account

- You should only manually change the Status picklist field on social posts if you are working with outbound posts. Provided your organization's configuration includes the Status field on the layout of inbound social post record detail pages, manually setting the Status field on an inbound social post can result in confusing items in the case feed. For example, if you change the Status of an inbound post to Sending, the Reply link in the case feed item disappears until you change the status back to None.

For Twitter accounts, agents can use case and lead feeds to see the content they are responding to, retweet, mark as favorite and follow tweets, send replies to tweets and direct messages, and delete tweets managed by your social accounts.

For Facebook accounts, cases and leads are created from your managed Facebook page and agents can use the feeds to see the content they are replying to, like posts and comments, send posts, comments, replies, and private messages, and delete posts managed by your social accounts.

Here are tips for dealing with some possible error messages.

| Message                                                                                                                                       | Action                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| You can't send a direct message to this Twitter user because he or she is not following you.                                                  | Use a reply to ask the Twitter user to follow your managed social account. Once they are following you, send them a direct message.                                                                                                                                                                                                                                                                      |
| Whoops! You already said that... Change your message and try again.                                                                           | You can't post the same text twice. Change your content and send again.                                                                                                                                                                                                                                                                                                                                  |
| Your content is too long.                                                                                                                     | Reduce your content to 140 characters or less. For Twitter replies, the handle is included in the character count.                                                                                                                                                                                                                                                                                       |
| Twitter replies must begin with a handle.                                                                                                     | The content field for a Twitter reply must be in the form: @[sender's handle] message text.<br><br>Ensure there is a space between the sender's handle and your message.                                                                                                                                                                                                                                 |
| Your response message type must be compatible with the original post's message type.                                                          | Change the message type to match the original message.                                                                                                                                                                                                                                                                                                                                                   |
| Your login to Radian6 or Social Studio has failed. The username or password may be incorrect. Update your credentials or reset your password. | An administrator must edit the Radian6 or Social Studio credentials on the Social Customer Management settings page.<br><br> <b>Note:</b> When an administrator makes a copy of or refreshes a Sandbox organization, a new organization is created, with a new ID, making the Radian6 or Social Studio login invalid. |
| Your post did not send.                                                                                                                       | We recommend creating a workflow to notify the case owner that an attempt to send a response via Twitter has failed.                                                                                                                                                                                                                                                                                     |

## How to Reconnect a Social Account

Reconnect your social account for Social Customer Service.

Your social account can be disconnected from Social Customer Service if your social media network provider's connect, or token, has expired. Many providers have expiration policies of 60 to 90 days.

1. From Setup, enter *Social Customer Management* in the **Quick Find** box, then select **Settings**.
2. On the **Social Accounts** tab, click **Reauthorize** in the **Action** column.  
The social network opens and asks you to authenticate the account. Once your account is reauthenticated, you are returned to the Social Accounts tab.

## Managing Social Posts

A social post is a Salesforce object that represents a post on a social network such as Facebook or Twitter.

The Social Posts tab or object is a collection of information about a post from a person or company on a social network, such as Twitter or Facebook. The available information for a post varies depending on the social network. You can view and manage social posts.

 **Note:** For inbound posts, setting a Status picklist value on the social post detail page does not stay with the post, as this field is for outbound posts only.

1. Click the **Social Posts** tab.
2. Optionally, select a view.

The list defaults to those recently viewed. Select a **View** or create a new one to filter the list of posts. If your organization has moderation enabled, select **Social posts without case** to view and either create a case for or ignore posts. You can also create a new view to fit your needs.

### EDITIONS

Available in: Salesforce Classic

Social Customer Service is available in **Enterprise**, **Performance**, and **Unlimited** editions.

### USER PERMISSIONS

To administer Social Customer Service:

- "Manage Users"
- AND
- "Customize Application"

To create case feed items:

- Feed Tracking for All Related Objects on the Case object

To send and receive social media posts or messages:

- Case Feed enabled
- AND
- Access to a social account

### EDITIONS

Available in: Salesforce Classic

Social personas and posts are available in: **Enterprise**, **Performance**, **Unlimited**, and **Professional** Editions.

### USER PERMISSIONS

To install and deploy Social Studio (Radian6) for Salesforce:

- "Customize Application"

3. Click on the social post name you'd like to manage or click **New Social Post** to create a post.

If you selected a view you can click **Edit** or **Del** (delete) as appropriate.



**Note:** On the Social Post tab, you can only create, edit, and delete posts in your Salesforce organization, not on the social networks.

4. To manage posts without cases, select the posts you'd like to either create a case for or ignore and click **Create Case** and **Ignore** as appropriate.

For example, an agent can ignore a Facebook post of "I love you guys!" as it does not warrant a case.

If you are using the Social Customer Service Starter Pack, you can enable case moderation on the Social Accounts tab in Setup, see Set up Social Customer Service. To enable moderation through Radian6 or Social Studio see, Enable Moderation for Social Customer Service.

5. If you have Approvals enabled, Social Posts tab has a `Social posts pending approval` list view that allows you to review multiple pending posts and approve or reject them as desired.



**Note:** Once approvals are enabled, the Approve Posts and Reject Posts buttons remain on the Social Posts tab. However they don't work for inbound and posts not needing approval.



**Tip:** If you approve a post from the Social posts pending approval list view and a system interruption, session timeout, or other unexpected issue prevents the post from being published on the intended social network, an error message displays on the individual case only, not on the list view. To help honor any commitments your company may have regarding response times on social networks, after approving posts from the list view, we recommend checking the posts' statuses to ensure they were sent successfully and don't need to be resent.

On the social post detail page you can:

- View, edit, and create the post's content and information.



**Note:** The information varies depending on the social network the persona is from.

Don't forget to click **Save** to save changes or create a new post.

- If your organization has moderation enabled, you can create a case for a post or ignore it if it does not warrant a case.
- Delete the post in your Salesforce organization.



**Note:** Social posts are not deleted when their parent record, usually a case, is deleted. Similarly, if a social post is associated with an account, contact, or lead through the polymorphic Who field, deleting any of those related records does not affect the social post.

You can reply to a social post from the case feed only, not the Social Posts tab.

## Managing Social Personas

A social persona is a Salesforce object that represents a contact's profile on a social network such as Facebook, LinkedIn, or Twitter.

The Social Personas tab or object is a collection of publicly available information about a person or company from Twitter or Facebook. A Persona is relative to the social network and there can be multiple personas attached to a single contact. You can edit or delete a persona but you can't manually create a social persona from Salesforce. The personas are created from public information on social networking sites. You can view and manage your social personas.

 **Note:** Social persona fields many have maximum character lengths set by standard or custom Salesforce limits. For example, the first name field is limited to 40 characters. If a social persona with a first name longer than 40 characters is created from an inbound social post the first name is truncated at the 40th character.

1. Click the **Social Personas** tab.
2. Optionally, select a view.  
The list defaults to those recently viewed. Select **All** in the **view** drop-down to show all social personas in your organization. You can also create a new view to fit your needs.
3. Click on the social handle you'd like to manage.  
If you selected a view, click **Edit** or **Del** (delete) as appropriate.

 **Warning:** If you delete a social persona through Contacts 2.0, all related social posts are also deleted.

On the social persona detail page you can:

- View and edit the contact's available information for that social network.  
 **Note:** The information varies depending on the social network the persona is from.
  - Delete the social persona from your organization.
  - Create, edit, and delete [social posts](#).
  - View which social network created the persona, in the **Source App** field. This field is set on creation and is not updateable. Social Personas created prior to Summer 15 do not have this field.
-  **Warning:** There is no field level security and you can't control who can create, read, edit, or delete Social Personas. Anyone in your organization can see all the data on a Social Persona object.

### EDITIONS

Available in: **Salesforce Classic**

Social personas and posts are available in: **Enterprise, Performance, Unlimited, and Professional** Editions.

### USER PERMISSIONS

To install and deploy Social Studio (Radian6) for Salesforce:

- "Customize Application"

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