



Collaborate With Everyone

Salesforce, Spring '24



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COLLABORATE WITH EVERYONE

No man is an island, even in Salesforce. Complete tasks quickly and efficiently by collaborating with people either inside or outside of your org.

Here you'll find information on collaboration tools like Chatter, Salesforce CRM Content, and even documents. There's no limit to what you can accomplish with others—figure out the best way to do it here.

[Collaborate Within Your Company](#)

Stay current with what's happening in your company. Share your knowledge in Chatter posts and comments, collaborate in groups, and access files and data across your organization.

[Collaborate with Partners and Customers](#)

Share updates with customers and partners in Chatter groups.

[Collaboration Resources for Users](#)

In addition to online help, Salesforce publishes printable documentation to help you learn about our features.

[Chatter Messenger and Chatter Desktop Are Retired](#)

[Help for Chatter Free Users](#)

[Help for Chatter.com Users](#)

[Help for Chatter External Users](#)

Collaborate Within Your Company

Stay current with what's happening in your company. Share your knowledge in Chatter posts and comments, collaborate in groups, and access files and data across your organization.

[Share Updates with People in Chatter](#)

Share updates with coworkers, collaborate in Chatter groups, and view record updates.

[Create, Share, and Organize Files](#)

Post files to feeds and records, share files with customers, and organize files into folders and libraries.

[Salesforce Chatter for Windows 10 Anniversary Edition Users](#)

Salesforce Chatter is a downloadable app for Windows 10 Anniversary Edition users. Salesforce Chatter combines Chatter feeds and posting functionality with the power of an app optimized for Windows 10 users.

Share Updates with People in Chatter

Share updates with coworkers, collaborate in Chatter groups, and view record updates.

[Welcome to Chatter in Lightning Experience](#)

Whether you're new to Chatter or switching from Salesforce Classic, Chatter in Lightning Experience offers tons of useful features. Use Chatter to communicate with colleagues, gain insight into your company, and preserve your tribal knowledge.

[Chatter Overview](#)

Use Chatter features, like feeds, profiles, groups, and more, to share information, collaborate, and keep up with the latest updates in your company.

[Get Started with Chatter](#)

Connect with people and share business information securely in real time.

[Work with Feeds](#)

Stay up-to-date on the posts and comments that you and other people make, as well as the record changes across your Salesforce organization.

[Chatter Streams](#)

Chatter streams are custom feeds that you create by combining multiple related feeds into one feed. Look for streams on your Chatter home page. Create up to 100 streams that each combine posts from up to 25 different feeds and feed types. Create streams that combine feeds from people, groups, and records, like accounts, opportunities, cases, and more.

[Work with Posts](#)

Share information and collaborate with other people inside and outside your organization.

[People in Your Organization](#)

Update your personal profile, and view the profiles of other people in your organization.

[Records and List Views](#)

Configure your follow settings for records, view a Chatter feed on a list view, and learn more about record recommendations.

[Collaborate in Chatter Groups](#)

Use public, private, or unlisted Chatter groups to collaborate with specific people in your company.

[Private Messages](#)

Use Chatter messages for secure private conversations with other Chatter users.

[Chatter Questions](#)

Got questions? Use Chatter Questions to post a question to a feed, then watch the answers roll in.

Welcome to Chatter in Lightning Experience

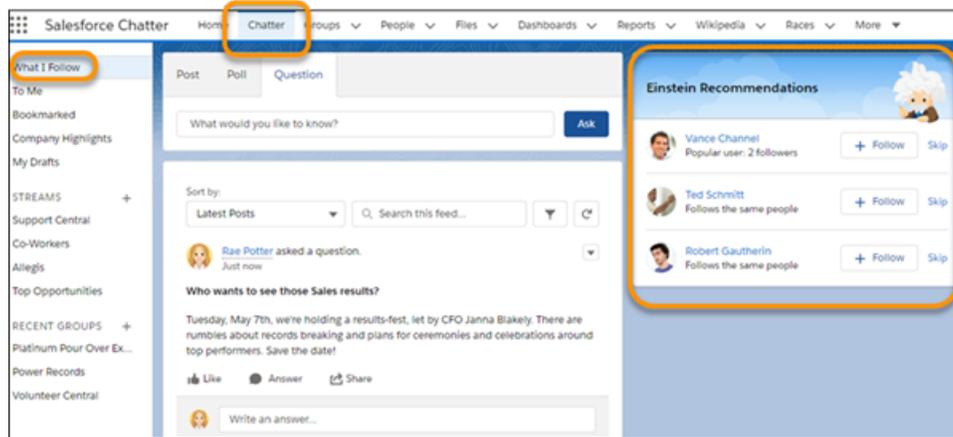
Whether you're new to Chatter or switching from Salesforce Classic, Chatter in Lightning Experience offers tons of useful features. Use Chatter to communicate with colleagues, gain insight into your company, and preserve your tribal knowledge.

Depending on how your org is configured, you can find Chatter everywhere. It can be on records of all types, it's the fundamental collaboration space for your groups. You can access Chatter on your mobile devices. But let's start with the Chatter tab, which is its home.

EDITIONS

Available in: Lightning Experience

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



The Chatter tab gives you quick access to some useful feeds, like What I Follow, To Me, Bookmarked, Company Highlights, and My Drafts. Select a feed to place it front and center on the Chatter tab.

- The What I Follow feed shows post activity on all the people, groups, and objects that you follow. For example, if you follow John Smith, you see the things John Smith posts to all the feeds that you have access to. Typically, the What I Follow feed is the default feed. If you're following fewer than 10 things, though, the Company Highlights feed becomes your default.
- The To Me feed shows the posts where you're @mentioned and the posts to your user profile page.
- The Bookmarked feed shows the posts that you have bookmarked. The Bookmarked feed gives you easy access to the posts you want to revisit.
- The Company Highlights feed shows you the most active posts across your organization. You can use it to find more things to follow. Once you follow more than 10, your default feed changes to What I Follow.
- The My Drafts feed shows posts that you're working on, but haven't saved. You can use the My Drafts feed to perfect a message and then post it or reconsider a message and toss it out.

The Chatter tab in Lightning Experience shows the five Chatter streams that you visited most recently. Click the Streams heading to open a list page that shows all your streams. Streams offer a way to combine different but related feeds into one super feed. For example, let's say you want to read everything that's posted about a project you're working on. With streams, you can combine feeds from the groups working on the project, the topics discussing it, the people assigned to it. You can add any feed type that's related to the project. Suddenly, instead of visiting many different feeds to get the whole story, you have this one stream you can go to for everything. Create up to 100 streams that each combine posts from up to 25 different feeds. Create streams that combine feeds from people, groups, and records, like accounts, opportunities, cases, and more.

The Recent Groups list links you to the last five groups you visited and gives you a way to create groups on the spot. With Recent Groups, it's easier than ever to get to the groups you visit most often.

In the right column of the Chatter tab, Einstein Recommendations lists people, groups, and objects that Einstein recommends to you. You can follow someone or something on the list or click **Skip** to dismiss one recommendation and invite another.

- 💡 **Tip:** For accessibility, every feed has a hidden Skip Feed link that you get to by tabbing. Skip Feed skips you past the feed to the End Feed tag. From End Feed, you can tab into the column that typically shows features like Einstein Recommendations and

Trending Topics. The Skip Feed link follows the tab succession, Sort by, Search, Filter (if present), Refresh this feed, and then Skip Feed.

SEE ALSO:

- [Get Started with Chatter](#)
- [View a Particular Feed](#)
- [Feed Sort and Filter Options](#)
- [Chatter Streams](#)
- [Chatter Groups](#)
- [Create Chatter Groups](#)

Chatter Overview

Use Chatter features, like feeds, profiles, groups, and more, to share information, collaborate, and keep up with the latest updates in your company.

Chatter works in accordance with all security and permission settings in your Salesforce organization. Chatter is enabled by default for organizations created after June 22, 2010. For organizations that were created before then, your administrator must enable Chatter. In Lightning Experience, if you don't see a Chatter tab, you can search for *Chatter* in the App Launcher. Click the result to open Chatter.

 **Note:** In Lightning Experience, most objects don't show a Chatter tab unless Feed Tracking is enabled for the object. The only exceptions are Group, Site, and User objects.

Chatter is available on a per-organization basis. Only users within the same Salesforce organization can communicate with each other through Chatter. You can add people outside your company's email domains to use Chatter in your organization. When you add external users to a group that you own or manage, they appear as customer users.

 **Note:** We use “company” and “organization”—or “org”—interchangeably. An organization is a single deployment of Salesforce with a defined set of licensed users. The words “company” and “organization” are used interchangeably in Chatter. For example, let's say you see “share a file with all Chatter users in your company,”. It means you're sharing with everyone who uses Chatter in the org.

Chatter is available to customer users and partner users in Experience Cloud sites. But it's not available to portal users in partner portals or Customer Portals.

Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser's plug-ins and extensions and try again.

Chatter isn't supported:

- In [unsupported browsers](#)
- For external users in Customer Portals or partner portals
- In the Console tab

Posts and comments that users make in Chatter are retained during the entire time that a customer's applicable org remains provisioned. We reserve the right to enforce limits on:

- The number of system-generated tracked feed updates. Currently tracked feed updates that are older than 45 days and have no likes or comments are deleted automatically. The tracked feed updates no longer appear in the feed. However, if auditing is enabled for a tracked field, the audit history for that field is still available.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- The number of email notifications that can be sent per org per hour.

The limits are subject to change. Contact Salesforce for more information.

[General Chatter Allocations](#)

Limits and allocations for Chatter features by edition and browser.

[Chatter Limits](#)

Limits for Chatter Plus user licenses.

[Chatter Feature Availability](#)

Let's compare the Chatter features that are available in Lightning Experience, Salesforce Classic, Experience Builder sites, and the Salesforce mobile app.

[Differences Between Chatter in Lightning Experience on Desktop and Mobile](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different in Chatter between desktop and mobile experiences.

General Chatter Allocations

Limits and allocations for Chatter features by edition and browser.

Chatter Allocations by Feature

These allocations are subject to change. Contact Salesforce for more information.

Feature	Allocation
Groups	
Groups a user can join	300 ¹
Groups in your org	30,000 ¹
Members in a group	Unlimited
Characters in the Information field in a group	4,000
Max size of email when posting to a group by email (including text and attachments)	25 MB
Attachments you can include in a post to a group by email	25
Feeds	
Mentions in a single post or comment	25
Characters in a mention search string	500 for a person's first and last name (combined), or for a group name
Characters in single post or comment	10,000. In rich-content posts, tags are included in this count, even though they're aren't shown.
Characters in a question	255, and the count is shown; answers can have 10,000 characters, and rich-content tags are included in the answer character count.

Feature	Allocation
Email notifications sent after you like or comment on a post	10
Bookmarks	Unlimited
Favorites	50
People, topics, and records you can follow	500 ²
Maximum posts you can see in your feed at any given time	The 500 most recent posts. This limit doesn't apply to profile, group, and record feeds.
Files	
File attachment size	2 GB
Times a file can be shared	2000
People and Profiles	
Profile photo size	8 MB
People you can add to a chat	10
People you can add to Chat My Favorites	100
Characters in a Chatter message	10,000
Skills	
Skills assigned to a user	100
Characters in a skill name	99
Topics	
Topics on a single post	10
Topics on a single record	100
Characters in a topic name	99
Topics on articles	200

¹You can join up to 300 groups and your org can have up to 30,000 groups. Archived groups count toward your org's group limits (30,000) but not toward a user's group membership limits (300).

²You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

Posts and comments that users make in Chatter are retained during the entire time that a customer's applicable org remains provisioned. We reserve the right to enforce limits on:

- The number of system-generated tracked feed updates. Currently tracked feed updates that are older than 45 days and have no likes or comments are deleted automatically. The tracked feed updates no longer appear in the feed. However, if auditing is enabled for a tracked field, the audit history for that field is still available.
- The number of email notifications that can be sent per org per hour.

Chatter Browser Limits

Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser's plug-ins and extensions and try again.

In the Spring '20 edition of Lightning Experience on iPad Safari, check your text editors for rich text editor support. For example, check for support in a feeds publisher. If you don't have rich text editor support—you can't add an emoji or a hyperlink—you're using an older, unsupported editor. Talk with Salesforce Support about bringing in the Quill editor to replace it.

Chatter Mentions Limits

You can't mention archived groups, unlisted groups, customer groups, and private groups that you're not a member of. If a person who isn't a member of a private group is mentioned in a post or comment on that private group, the mention link displays as gray and links to the member's profile page. An exception is when the person mentioned has Modify All Data permission. In this case, the link displays in blue and links to the member's profile page. However, Salesforce security and sharing rules still apply. People who aren't a member of a private group don't have access to the private group and don't see or get notified about any updates.

Chatter Limits

Limits for Chatter Plus user licenses.

Chatter Plus Feature	Allocation
Chatter Plus licenses in your org	Unlimited
Data storage per Chatter Plus user	20 MB
File storage per Chatter Plus user (Professional Edition)	612 MB
File storage per Chatter Plus user (Enterprise, Performance, and Unlimited Editions)	2 GB

The limits are subject to change. Contact Salesforce for more information.

Chatter Feature Availability

Let's compare the Chatter features that are available in Lightning Experience, Salesforce Classic, Experience Builder sites, and the Salesforce mobile app.

Available in: Lightning Experience, Salesforce Classic, Experience Builder sites, and the Salesforce mobile app

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

Chatter General

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Chatter tab	✓	✓	—	✓
Compact feed	—	—	✓	—

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Company verify answers	—	—	✓	—
Direct messages	—	—	✓	—
Edited marker	✓	✓	✓	—
Feed caching	✓	—	✓	✓
Feed moderation	—	—	✓	—
Feed tracked changes	✓	✓	✓	✓
Filters	✓	✓	✓	✓
Find in feed	✓	✓	✓	✓
Follower list	✓	✓	✓	✓
Infinite scrolling	✓	—	—	✓
Liked By card	✓	✓	✓	✓ (iOS only)
Likes	✓	✓	✓	✓
Live comments	✓	—	—	—
Mute and unmute	✓	✓	✓	—
Notifications, email	✓	✓	✓	✓
Notifications, in-app	✓	—	✓	✓
Quick actions composer	✓	✓	✓	✓
Recommendations	✓	✓	✓	—
Seen by list on post	✓	—	—	—
Share post	✓	✓	✓	✓
Share post link	✓	✓	✓	—
Streams	✓	—	✓	—
Top rated answers	—	—	✓	—
View count on post	✓	—	✓	—

Chatter Publisher

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Attachments	✓	✓	✓	✓
Bookmarks	✓	✓	✓	✓
Code snippets	✓	—	✓	—
Code snippets in comments	✓	—	✓	—
Delete comment	✓	✓	✓	✓
Edit comment, plain text	✓	✓	✓	✓
Edit comment, rich text	✓	✓	✓	—
Edit post	✓	✓	✓	—
File publisher	✓	—	—	—
Link publisher	✓	✓	—	✓
Overflow menu	✓	✓	✓	—
Poll publisher	✓	✓	✓	✓
Question publisher	✓	✓	✓	✓
Rich link previews	✓	—	✓	—
Rich publisher apps	—	—	✓	—
Rich text comments	✓	—	✓	—
Rich text posts	✓	✓	✓	—
Thanks	—	✓	—	✓
Topics	✓	✓	✓	✓
Upvote/downvote	—	—	✓	—

Files in Chatter

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Content libraries in feed file picker	✓	✓	✓	—
Files Connect	✓	✓	—	—
Inline images, add to posts ¹	✓	—	✓	—

¹ Copying inline images from external sources and pasting them into the editor isn't supported.

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Inline images, add to comments ²	✓	—	✓	—
Multi-attach in feed	✓	—	✓	—
Visibility control over files in records	✓	—	✓	—

Chatter Groups

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Announcements	✓	✓	✓	—
Customizable banner	✓	—	—	—
Filter by unread posts	✓	—	✓	—
Live feeds	✓	—	—	—
Post pinning	✓	—	✓ ³	—

Chatter Profiles

Feature	Lightning Experience	Salesforce Classic	Experience Builder Sites	Salesforce App
Customizable banner	✓	—	—	—
Hover card	✓	✓	—	—
Out-of-office setting	✓	—	—	—

Differences Between Chatter in Lightning Experience on Desktop and Mobile

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different in Chatter between desktop and mobile experiences.

Feeds

When viewing feed items in the Salesforce mobile app, you can't see:

- Live feed or live comment updates.
- Rich text formatting or code snippets in the main feed. (*Salesforce for Android and Salesforce for iOS only*)
- Inline images in the main feed—you see a placeholder with the name of the image instead. (*Salesforce for Android only*)

EDITIONS

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

² Copying inline images from external sources and pasting them into the editor isn't supported.

³ Post pinning isn't available in compact feeds.

- Multiple attachments on an item in the main feed—only the first attachment is displayed. (*Salesforce for Android and Salesforce for iOS only*)
- Previews of links in the main feed. (*Salesforce for Android and Salesforce for iOS only*)
- Bundled posts in the What I Follow feed. (*Salesforce for Android and Salesforce for iOS only*)
- Social feed posts. (*Salesforce for Android and Salesforce for iOS only*)
- The full content of posts shared from Lightning Experience when viewed in the main Chatter feed (*Salesforce for Android and Salesforce for iOS only*).
- The full content of posts shared from Lightning Experience when viewed in feeds on profiles (*Salesforce for iOS only*).



Note: To see the shared content, tap the **View Post** link in the shared feed item.

When posting, commenting, or doing other work in feeds from the Salesforce mobile app, you can't:

- Apply rich text formatting or include code snippets in feed items.
- Add more than one attachment to feed items.
- Edit all feed posts.
- Share posts. (*mobile browser app only*)
- Search in feeds on user profiles and records.

There are some other features that aren't available in Chatter in the Salesforce mobile app. You can't:

- Switch the main feed to show only muted posts.
- Filter the main feed to show all updates, fewer updates, questions, or only posts related to a specific object.
- Send or view Chatter messages.
- See recommendations.
- Add or view Chatter favorites.
- See Chatter activity statistics or Chatter influence status.
- Invite coworkers to sign up for Chatter.
- For external users, receive Chatter push notifications.

Get Started with Chatter

Connect with people and share business information securely in real time.

[Chatter Tab Overview](#)

The Chatter tab gives you instant access to most of the collaboration features in Chatter.

[Chatter Desktop](#)

Chatter Desktop is a free desktop application that lets you collaborate in Chatter without a browser. Chatter Desktop was retired in June 2018.

[The People and Records You Auto-Follow Initially](#)

Starting in June 2010, when your administrator initially turns on Chatter, we help get you started by automatically following certain users and records in your organization.

[Like Posts and Comments](#)

Like posts or comments to show your approval and receive email notifications if others comment on that post. You receive notifications only if you've selected to in your personal Chatter settings.

[Reply to Chatter Email Notifications](#)

When you receive certain email notifications, you can conveniently perform some actions by replying directly from your email.

[Navigate to Chatter Email Settings](#)

In your personal Chatter email settings, you can change your preferences for receiving email notifications and digests. On a group page, you can set your notification preferences for that group.

[Chatter Email Digests](#)

Email digests conveniently summarize recent activity in Chatter so you don't miss important discussions. You can choose to receive daily or weekly summaries of updates from your personal feed or any group's feed.

[Guidelines for Managing Your Personal Chatter Email Settings](#)

Control the number of Chatter emails that you receive by choosing your most important feeds. And set the best frequency for personal and group digests.

Chatter Tab Overview

The Chatter tab gives you instant access to most of the collaboration features in Chatter.

From the Chatter tab you can:

- [Post content](#) that's shared with people who follow you, or comment on someone else's post.
- [Like posts or comments](#) to show your support.
- [Share a post](#) to your profile or to a group. Send a link to the post to other Chatter users in an email or instant message.
- [View, filter, and sort your feed](#) to view posts from the people and records that you follow and the groups that you're a member of. View, filter, and sort posts that mention you, that you bookmarked, or all posts from your company.
- [Search the feed](#) for information in posts and comments on the Chatter tab.
- [Bookmark a post](#) and track future comments on the post, or remember to follow up.
- [Add topics to a post](#)—categorize the post and give it more visibility.
- Access your [people](#), [groups](#), [files](#), and [topics](#) lists.
- [View or update your profile](#) information.
- [Read or send private messages](#) that are visible only to certain people.
- [Access your favorites](#) to see the latest posts and comments for your favorite topics, list views, and Chatter feed searches.
- [View your recommendations](#) for people, groups, files, and records that closely relate to your job and interests.
- [View trending topics](#) that people are discussing in Chatter right now.
- [Invite people to join your Chatter network](#), even though they don't have Salesforce licenses to use Chatter.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Chatter Desktop

Chatter Desktop is a free desktop application that lets you collaborate in Chatter without a browser. Chatter Desktop was retired in June 2018.

For more information, see [Chatter Desktop Retirement](#).

Use Chatter Desktop to post and comment in Chatter, and receive updates about your groups and the people, records, and files that you follow. Chatter Desktop also supports chat and private Chatter messages. It displays Chatter updates and private messages as popup notifications in your Windows taskbar or Mac OS X Dock.



Note: Customer users can install and use Chatter Desktop but can't access all its functionality. For example, customer users can't follow users or records, chat, or access administration options.

[Install Chatter Desktop](#)

Chatter Desktop was retired in June 2018.

[Connect Chatter Desktop](#)

Chatter Desktop was retired in June 2018.

[Configure Chatter Desktop](#)

Chatter Desktop was retired in June 2018.

[Using Chatter Desktop](#)

Chatter Desktop was retired in June 2018.

[Chatter Desktop Troubleshooting Tips](#)

Find solutions for troubleshooting Chatter Desktop.

[Disabling Chatter Desktop Remotely](#)

Chatter Desktop was retired in June 2018.

[Uninstalling Chatter Desktop](#)

How to uninstall Chatter Desktop.

[Chatter Desktop Releases](#)

Chatter Desktop was retired in June 2018.

Install Chatter Desktop

Chatter Desktop was retired in June 2018.



Important: Chatter Desktop was retired in June 2018. For more information, see [Chatter Desktop Retirement](#).

Salesforce provides two Chatter Desktop installers: a standard version for individual installations and a managed version for enterprise deployments.

The following are the minimum requirements for using Chatter Desktop:

- Windows
 - 2.33 GHz or faster x86-compatible processor, or Intel Atom™ 1.6 GHz or faster processor for netbook devices

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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- Microsoft® Windows® XP, Windows Server® 2003, Windows Server 2008, Windows Vista® Home Premium, Business, Ultimate, or Enterprise (including 64-bit editions) with Service Pack 2, or Windows 7
- 512 MB of RAM (1 GB recommended)
- Mac
 - Intel® Core™ Duo 1.83 GHz or faster processor
 - Mac OS X v 10.5, 10.6, or v10.7
 - 512 MB of RAM (1 GB recommended)

! **Important:** Chatter Desktop uses Adobe® Integrated Runtime (AIR®), Adobe's cross-platform runtime environment for desktop applications, and runs only on operating systems that Adobe AIR supports. Chatter Desktop doesn't run on operating systems that Adobe AIR doesn't support, such as 64-bit Linux. See the Adobe website for information on Adobe AIR.

The standard version:

- Requires administrator privileges on your machine
- Doesn't require administrator privileges in Salesforce
- Automatically installs the required version of Adobe® Integrated Runtime (AIR®)
- Requires acceptance of an end-user license agreement when Chatter Desktop first launches
- Posts "Installed Chatter Desktop" to Chatter when Chatter Desktop first launches
- Periodically checks Salesforce for new versions

To install the standard version:

1. From your personal settings, enter Chatter Desktop in the `Quick Find` box, then select Chatter Desktop.
2. Click the **Download Now** badge.
3. Follow the on-screen instructions.

Administrators can disable the Chatter Desktop download page and block users from accessing Chatter Desktop.

! **Important:** Chatter Desktop uses Adobe® Acrobat® Reader to preview PDF files. Before you preview files with Chatter Desktop, download Adobe Acrobat from [Adobe's website](#), install it, and open it at least once to complete the installation.

SEE ALSO:

[Uninstalling Chatter Desktop](#)

Connect Chatter Desktop

Chatter Desktop was retired in June 2018.

! **Important:** For more information, see [Chatter Desktop Retirement](#).

If you have multiple Salesforce or Chatter logins, create a connection for each login. The connection lets Chatter Desktop access the Chatter data that you can access with that login on the web.

1. Click  the Chatter Desktop settings icon and select **Settings**.
2. In the Connections section, enter a name for the connection and the URL from which you log in. The URL must begin with `https://` and end with `salesforce.com` or `chatter.com`. For example, if your organization has a European division that you log into from `https://emea.salesforce.com`, enter that URL and name the connection *Europe*.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

By default, Chatter Desktop connects to your main instance of Salesforce (Production) or your Lightning Platform sandbox.

- To authorize Chatter Desktop to connect using the login, click **Authorize** and follow the on-screen instructions.

Use the radio buttons on the Settings screen to specify a default connection. To quickly switch connections while using Chatter Desktop, click , select **Switch Connection**, and choose the connection.

 **Note:** You can create multiple connections, but Chatter Desktop can log in to only one connection at a time. You can't use Chatter Desktop to display data from multiple connections simultaneously.

SEE ALSO:

[Configure Chatter Desktop](#)

Configure Chatter Desktop

Chatter Desktop was retired in June 2018.

 **Important:** For more information, see [Chatter Desktop Retirement](#).

The default Chatter Desktop configuration is appropriate for most users, but several Chatter Desktop settings are configurable. To access Chatter Desktop settings, click  the Chatter Desktop settings icon and select **Settings**. From the Settings screen, you can:

- Configure Chatter Desktop to launch when you start your computer.
- Configure Chatter Desktop to minimize when you close it.
- Turn popup notifications on or off. Popup notifications are enabled by default.
- Manage alerts for new feed posts and comments (advanced settings).
- Configure Chatter Desktop to always display in the foreground (advanced settings).
- Move the chat window to the foreground when you receive a new message.
- Play sounds when someone starts a new chat with you. Or play a sound for every chat message when a chat is minimized or out of focus. For example, a chat can be out of focus when you have multiple chats or are using another application.
- Edit your [connections](#).

SEE ALSO:

[Chatter Desktop Troubleshooting Tips](#)

Using Chatter Desktop

Chatter Desktop was retired in June 2018.

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

 **Important:** For more information, see [Chatter Desktop Retirement](#).

In the Chatter Desktop window:

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Click: **To:**

Your profile photo

Change your chat status. Select ● **Available**, ● **Away**, or ● **Offline**. People can't chat with you when you're ● **Offline**.



See feed updates from everyone and everything you follow, and post an update.

- For any feed post, click **Comment** to add a comment. Click **Like** to receive email notifications if others comment on that post. Click **Delete** to delete the post if you have access.
- To post a file from your computer, drag the file to , or click , which appears when you enter a post.
- To post a link, enter the link in the text box at the top of your feed, or click , which appears when you enter a post.
- Use the **Sort By** filter at the top of a feed to sort updates by:
 - Post Date—Sorts feeds by post date. To see comments, you must click **Show All Comments** below a post.
 - Post and Comment Date—Sorts feeds by post and comment date. Each comment appears again when you click **Show All Comments** under its associated post.



See and comment on updates directed to you.



Chat with people and see their updates. Chat messages appear in a separate window.

- Click **Chat Favorites** to see people or chats you've added as favorites. To add a favorite, click  next to someone's name or in any active chat with one or more people.
- Click **Following** or **Followers** then click a person's name to see their updates or post to their feed.
- Hover over someone's name:
 - Click  to send them a private message.
 - Click  to add them as a favorite chat. Their name appears on your **Chat Favorites** list.
 - Click  to follow someone or  to stop following them.
 - Click  to start a chat. You can add up to 10 people to the same chat by clicking  in the chat window and searching for people to add. You can't chat with people who are ● **Offline**.

 **Note:** Chat is available only if it's enabled in your organization.



Read and reply to private Chatter messages. Click a message to view it, or click **New Message** to send a new message.

 **Note:** Messages are available only if they are enabled in your organization.



See feed updates from groups:

- Click a group name or search for a group to view its feed or to post updates. You can post in all public groups and any private groups that you belong to.
- Click **Join** to join a group, or **Member** to leave the group.
- Click  to view the group description.



See and comment on records that you follow. From the dropdown menu at the top, select the type of record you want to view, for example, Account. If you're not following records, there aren't any records in the list. Click a record's name to view its details. Chatter Desktop shows the first eight fields on a record.



Edit your [Chatter Desktop settings](#) or [switch your connection](#).



Instantly synchronize your data. While Chatter Desktop synchronizes your data automatically, it doesn't always happen instantly. Instant synchronization gives you control over when synchronization occurs.

SEE ALSO:

[Chatter Desktop Troubleshooting Tips](#)

Chatter Desktop Troubleshooting Tips

Find solutions for troubleshooting Chatter Desktop.

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



Important: Chatter Desktop was retired in June 2018. For more information, see [Chatter Desktop Retirement](#).

Chatter Desktop uses Adobe® Integrated Runtime (AIR®). This table describes solutions to common AIR-related issues. For more information, consult the Adobe® knowledge base.

Problem	Solution
The Chatter Desktop installation fails	<p>Delete the Shared Local Object (SLO) and Encrypted Local Store (ELS) directories and reinstall Chatter Desktop.</p> <p>The SLO stores persistent information, like last screen position and size, and is on these paths for these operating systems:</p> <ul style="list-style-type: none"> • Mac OS: <code>/[USER]/Library/Preferences/sfdc-desktop*</code> • Windows Vista, Windows 7, Windows 8.x: <code>C:\Users\[USER]\AppData\Roaming\sfdc-desktop*</code> • Windows XP:<code>C:\Documents and Settings\[USER]\Application Data\sfdc-desktop*</code> <p>The ELS stores the OAuth2.0 identities for users and is at</p> <ul style="list-style-type: none"> • Mac OS: <code>/[USER]/Library/Application Support/Adobe/AIR/ELS/sfdc-desktop*</code> • Windows Vista, Windows 7, Windows 8.x:<code>C:\Users\[USER]\AppData\Roaming\Adobe\AIR\ELS\sfdc-desktop*</code> • Windows XP:<code>C:\Documents and Settings\[USER]\Application Data\Adobe\AIR\ELS\sfdc-desktop*</code>

Problem	Solution
Chatter Desktop on Linux freezes, presents an empty window, doesn't save your password, or malfunctions in another way	<p>If you're using the managed installation, verify</p> <ul style="list-style-type: none"> The <code>.chatterdesktop</code> file is well-formed and contains valid XML The URLs in the <code>.chatterdesktop</code> file are valid, and each URL begins with <code>https://</code> and ends with <code>salesforce.com</code> <p>Also troubleshoot your Encrypted Local Storage (ELS) keystore. For more information, see http://kb2.adobe.com/cps/492/cpsid_49267.html</p>
Chatter Desktop doesn't preview PDF files	Chatter Desktop uses Adobe® Acrobat® Reader to preview PDF files. Before you preview files with Chatter Desktop, download Adobe Acrobat from Adobe's website , install it, and open it at least once to complete the installation.
Photos with comments don't refresh	Click the sync icon.

SEE ALSO:

[Configure Chatter Desktop](#)

Disabling Chatter Desktop Remotely

Chatter Desktop was retired in June 2018.

 **Important:** For more information, see [Chatter Desktop Retirement](#).

If the computer where you installed Chatter Desktop is stolen or lost, you can block Chatter Desktop from accessing your Salesforce data.

- From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- In the Remote Access section, click **Revoke** next to Chatter Desktop.

SEE ALSO:

[Chatter Desktop Troubleshooting Tips](#)

Uninstalling Chatter Desktop

How to uninstall Chatter Desktop.

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

 **Important:** Chatter Desktop was retired in June 2018. For more information, see [Chatter Desktop Retirement](#).

Windows:

- Go to **Start > Control Panel > Uninstall a program**.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

2. Double-click Chatter Desktop. You can also right-click it and select **Uninstall**.
3. Click **Yes** when prompted.

Mac:

1. Go to your applications folder. You can also type *applications* in Spotlight.
2. Find the salesforce.com folder with Chatter Desktop in it and drag it to the trash.

Chatter Desktop Releases

Chatter Desktop was retired in June 2018.

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

 **Important:** Chatter Desktop was retired in June 2018. For more information, see [Chatter Desktop Retirement](#).

This table describes the updates in each Chatter Desktop release.

Version	Updates
3.2.3	<ul style="list-style-type: none"> • Installer certificate update
3.2.2	<ul style="list-style-type: none"> • Installer certificate update
3.2.1	<ul style="list-style-type: none"> • Installer certificate update
3.2	<ul style="list-style-type: none"> • Configure desktop alerts for new feed posts and comments • Configure Chatter Desktop to always display in the foreground • Delete feed posts if you have access • Post in all public groups • Scrolling and active links supported in group descriptions • Miscellaneous bug fixes including negative counts and names displayed twice in likes and broken hash tag topic links.
3.1.1	<ul style="list-style-type: none"> • Installer certificate update
3.1	<ul style="list-style-type: none"> • Attach files to comments • View your chat list sorted by first name • View the last activity date for your groups • View multiple chats more easily • Sort your chat favorites by people's availability • See improved icons for your Chatter feed and file dragging and dropping to your posts

3.0	<ul style="list-style-type: none"> • Chat with one or more people in your organization • Like comments • View a list of people who like a post or comment • View files attached to comments • View dashboard snapshots • View shared messages • Several miscellaneous bug fixes, including feed improvements using new components and an issue that prevented adding an @mention after a #topic
2.1	<ul style="list-style-type: none"> • Support for customer users • Support for private Chatter messages • Miscellaneous bug fixes, including an issue with popup notifications stealing OS focus
2.0	<ul style="list-style-type: none"> • A new user interface and visual design • View records
1.3.3	<ul style="list-style-type: none"> • Global search for @mentions • Create instances on the Login screen • Switch and authenticate instances without restarting • Miscellaneous bug fixes, including an issue that generated empty notifications and an issue with the installer
1.3.2	<ul style="list-style-type: none"> • An intermediate build to accommodate changes to Adobe AIR. Chatter Desktop immediately performs an extra update after 1.3.2 installs.
1.2.1	<ul style="list-style-type: none"> • Locale fixes for Norwegian, Danish, Finnish, and Dutch
1.2.0	<ul style="list-style-type: none"> • User and group details • Links to indicate you like a post • @mentions, which render in feeds and link to the mentioned user's profile • #topics, which render in feeds and link to search results in your browser • Auto-complete for @mentions and #topics • Performance improvements including image caching • Norwegian language support • Miscellaneous bug fixes
1.1.1	<ul style="list-style-type: none"> • Updated for use with <code>chatter.com</code>

	<ul style="list-style-type: none"> • Minor bug fixes
1.1.0	<ul style="list-style-type: none"> • Click files to preview them • Select the To:Me tab to see posts directed to you • Click groups and users to view their walls • Write on the walls of groups and users
1.0.7	<ul style="list-style-type: none"> • Photo loading issue resolved
1.0.6	<ul style="list-style-type: none"> • Performance optimizations for people and groups • Release of Chatter Desktop managed version
1.0.5	<ul style="list-style-type: none"> • An option to log into your Developer Sandbox • Performance optimizations • Korean locale fixes

SEE ALSO:

[Install Chatter Desktop](#)

The People and Records You Auto-Follow Initially

Starting in June 2010, when your administrator initially turns on Chatter, we help get you started by automatically following certain users and records in your organization.

Who and what you auto-follow differ based on the size of your organization:



Note: The auto-follow setting for records applies only to the records that exist at the time your administrator turns Chatter on. For any future records that you create, auto-follow is disabled by default to reduce the number of updates you receive in your Chatter feed. However, if you want to receive updates on all future records that you create, you can enable auto-follow in your personal settings.

Currently, you can't customize a report based on records that you're following in Chatter.

If Your Organization Has:	Users You Follow Automatically	Records You Follow Automatically
15 users or fewer	All users in your organization	Up to 25 of your most recently used records, in the following order: <ul style="list-style-type: none"> • Open opportunities you own • Accounts you own • Open cases you own • Contacts you own • Open opportunities you created • Accounts you created • Open cases you created

If Your Organization Has:**Users You Follow Automatically****Records You Follow Automatically**

16 or more users

Up to 25 users in your organization, including (if available):

- Your manager
- Users that report to your manager
- Your subordinates
- Teammates on your account teams
- Teammates on your opportunity teams

- Contacts you created
- Open opportunities you last modified
- Accounts you last modified
- Open cases you last modified
- Contacts you last modified
- Open opportunities you viewed
- Accounts you viewed
- Open cases you viewed
- Contacts you viewed

Up to 25 of your most recently used records, in the following order:

- Open opportunities you own
- Accounts you own
- Open cases you own
- Contacts you own
- Open opportunities you created
- Accounts you created
- Open cases you created
- Contacts you created
- Open opportunities you last modified
- Accounts you last modified
- Open cases you last modified
- Contacts you last modified
- Open opportunities you viewed
- Accounts you viewed
- Open cases you viewed
- Contacts you viewed

SEE ALSO:[People Recommendations](#)[Record Recommendations](#)[Automatically Follow the Records That You Create](#)

Like Posts and Comments

Like posts or comments to show your approval and receive email notifications if others comment on that post. You receive notifications only if you've selected to in your personal Chatter settings.

Below a post or comment, click **Like**.

 **Note:** When upvotes are enabled in an Experience Builder site, they count toward influence as likes received.

After you click **Like** on a post, the person who created the post is notified, and you receive email notifications if others comment on that post. If you click **Like** on a comment, the person who created the comment is notified, but you aren't notified about subsequent comments. You can change this notification behavior through your [email notification settings](#) on page 25.

- To stop liking a post or a comment, click **Unlike**. When you stop liking a post or a comment, you aren't notified about subsequent comments or likes.
- View the profiles of others who have liked a post by clicking their name at the bottom of the post or comment, for example, "**John Smith** likes this."
- If more than three people like a post, click the link to see the full list; for example, "You, **John Smith**, and **2 others** like this."

 **Note:** From that list, you can follow or stop following people.

- Likes on comments show how many people have liked the comment, for example, "**1 person**" or "**7 people**". To see their names, click the link.

SEE ALSO:

[Guidelines for Managing Your Personal Chatter Email Settings](#)

Reply to Chatter Email Notifications

When you receive certain email notifications, you can conveniently perform some actions by replying directly from your email.

You can reply to the types of email that are listed in the table, or any notification from `reply@chatter.salesforce.com`. Before you can reply to email notifications, your administrator must enable email replies for your organization.

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

EDITIONS

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

Before replying, check the email address that displays in the **To** field of your email. Valid addresses contain tokens, or long character strings, both before and after the @ symbol, such as `w8t27apy1@j321imd9gbs.d8rx.d.chatter.yourInstance.salesforce.com`. Some email applications automatically use the **From** address from the original email, `reply@chatter.salesforce.com`, which isn't a valid address for receiving replies. If you see this shortened address in the **To** field of your reply email, replace it with the valid reply-to address in the email header information. For example, in an application such as IBM® Lotus Notes®:

1. Open the original email.
2. Click **View > Show > Page Source**.
3. In the **Reply-To** section, copy the email address that looks like:
`w8t27apy1@j321imd9gbs.d8rx.d.chatter.yourInstance.salesforce.com`.
4. Paste the reply-to address in the **To** field of your reply email.

Consider these tips when sending email replies.

- Send replies from the email address specified on your profile. If you use email aliases or email forwarding services that send replies from a different email address, your replies aren't processed.
- To bookmark, mute, like or unlike, and follow or unfollow, use the exact single word or the exact text in your replies. For example, when you want to like, enter only *like* (case insensitive) or *+1* in the body of your email. We ignore extra white spaces or the original message that some email applications include and process the reply as a like, a bookmark, or other response. However, if you include any other text in the body, such as *Like!* or *Like this?*, we process your reply as a comment.
- We treat replies that contain your personal email signature as part of your comment. Default signatures inserted by mobile devices, such as *Sent from my iPhone*, are automatically removed. Before you reply, delete custom signatures and any extra text you don't want posted to Chatter. Or, add a separator line to the top of your signature to have it automatically removed. The separator line must have a minimum of one of the following characters:
 - Dash (–)
 - Equal sign (=)
 - Underscore (_)

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

- We ignore attachments, @mentions, and inline images in replies.
- The Reply to Chatter feature only works with plain text email replies. This feature doesn't work if your mail app only sends content wrapped in HTML.



Note: As of the iOS 16 update, Apple only sends email content wrapped in HTML. Choose a different app to send out content as a plain text or directly post your reply to Chatter if you've updated to iOS 16.

SEE ALSO:

[Like Posts and Comments](#)

Navigate to Chatter Email Settings

In your personal Chatter email settings, you can change your preferences for receiving email notifications and digests. On a group page, you can set your notification preferences for that group.

- Click your avatar at the top of the page, and select Settings. Enter *Chatter* in the Quick Find box, then select **Chatter Email Settings** or **Email Notifications**—whichever one appears.
- From any group page, click **Email Me... > Email Settings**.

To receive Chatter email notifications and digests, your administrator must enable email notifications for your organization. When email notifications are enabled for your organization, you can go to your personal settings to select *Receive emails* to receive Chatter email.



Warning: Deselecting *Receive emails* prevents you from receiving all Chatter email notifications and all Chatter bell notifications within the app. To see bell notifications, email notifications must be turned on.

SEE ALSO:

[Chatter Email Digests](#)

[Guidelines for Managing Your Personal Chatter Email Settings](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Chatter Email Digests

Email digests conveniently summarize recent activity in Chatter so you don't miss important discussions. You can choose to receive daily or weekly summaries of updates from your personal feed or any group's feed.

Personal digests include the updates that you see in your own Chatter feed. In a personal digest, you see updates about the groups that you belong to and the people, records, and files that you follow. Group digests include updates from groups' Chatter feeds.

Daily digests include up to 50 of the latest posts from the previous day. Weekly digests include up to 50 of the latest posts from the week. All posts in each digest show their three latest comments. Chatter sends daily digests at approximately midnight every day, and weekly digests at approximately midnight on Sunday. For user digests, the time is according to the user's time zone. For group digests, the time is according to the organization's time zone. Neither time is configurable.

When you become a member of a group, you don't receive email notifications initially because they're turned off by default. You can use `Set default frequency for groups I join:`, in your personal Chatter Email Notifications settings, to choose how often to receive emails from new groups. Changing the default frequency doesn't affect the groups you already belong to.

If your organization existed before Summer '11 and is a Professional, Enterprise, Unlimited, or Developer Edition organization, you may still receive daily digests by default.

SEE ALSO:

[Navigate to Chatter Email Settings](#)

[Guidelines for Managing Your Personal Chatter Email Settings](#)

Guidelines for Managing Your Personal Chatter Email Settings

Control the number of Chatter emails that you receive by choosing your most important feeds. And set the best frequency for personal and group digests.

Email Me When Someone

Be choosy about your personal email settings. Make selections that help you stay on top of important discussions without becoming overwhelmed by too much email.

Option	Most Important	Recommendations and Notes
Follows me		If you're not already following the person, you can click a link in the email to start following your new follower.
Posts on my profile	✓	People approach you directly by posting questions or information on your profile, so make sure that you get notified.
Shares a post I made		This setting applies only to posts shared in Salesforce Classic. Posts shared in Lightning Experience don't trigger an email notification.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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Option	Most Important	Recommendations and Notes
Likes or upvotes my post or comment		Upvote notifications are only available in orgs with upvote functionality enabled.
Comments on my status or a change I made		This setting provides notification for actions taken on feed tracked changes. A feed tracked change is a change that you make on a Salesforce record that triggers an automatic post to your Chatter feed. Enabling this option notifies you when someone comments on the automatic post.
Comments on a post on my profile		
Comments after me		After you commented on an item, get notifications for comments after yours.
Comments on an item I bookmarked		If you use bookmarks to track items that you're interested in, get notified each time someone comments on that item. If you typically use likes to track items of interest, then this option is less important.
Comments on an item I like	✓	When you like a post, you can get notifications for the comments that come in. You don't receive notifications after liking a comment.
Mentions me in a post	✓	People use mentions to ask for your input and draw you into discussions, so make sure that you get notified.
Mentions me in a comment	✓ ✓	People use mentions to ask for your input and draw you into discussions, so make sure that you get notified.
Sends me a message	✓	Get <i>Sends me a message</i> notifications when people send you private Chatter messages, including notifications about files that have been shared with you.
Endorses me on a topic		

Set Frequency for Personal Digest

Option	Recommended	Recommendations and Notes
Daily	✓	Daily digests include the 50 latest posts from the previous day and the three latest comments on each post.
Weekly		Weekly digests include the 50 latest posts from the week and the three latest comments on each post.
Limited		Limited means less than weekly. If you're selective about the options in the "Email me when someone" section, try Limited to reduce your number of personal digests.

Personal digests aren't supported in communities.

Set Default Frequency for Groups I Join

Changing the default frequency for groups you join doesn't affect the groups you already belong to.

Option	Recommended	Recommendations and Notes
Email on every post		In communities, the <code>Email on every post</code> option is disabled after more than 10,000 members choose this setting for the group. All members who had this option selected are automatically switched to <code>Daily digests</code> .
Daily digests		Daily digests include the 50 latest posts from the previous day and the three latest comments on each post.
Weekly digests		Weekly digests include the 50 latest posts from the week and the three latest comments on each post.
Limited	✓	Limited means less than weekly. Keep this default setting for all new groups. You can change to more frequent notifications for groups that you expect to monitor and contribute to actively. If your org has the Send announcement emails permission enabled, you still receive some Group emails.

 **Note:** Users can choose the notification frequency after they start following a group, or an admin can set the frequency for all users using Data Loader. For more information about using Data Loader to change email frequency, see [Set the default group notification email and its frequency via Data Loader](#).

SEE ALSO:

[Chatter Email Digests](#)

[Navigate to Chatter Email Settings](#)

Work with Feeds

Stay up-to-date on the posts and comments that you and other people make, as well as the record changes across your Salesforce organization.

[Chatter Feeds Overview](#)

Follow people and records to see updates about them in Chatter. Updates appear in feeds on profiles, groups, the Chatter tab, topic detail pages, and on record detail pages.

[View a Particular Feed](#)

Change your Chatter feed to show a subset of posts.

[Filter and Sort Your Feeds](#)

In your feeds, use the filter and sort options to see updates that are relevant to you.

[Keep Track of Posts with Bookmarks](#)

Bookmarking lets you track posts that you're interested in.

[Create a Task from a Post](#)

Read a post that you want to follow up on? In Salesforce Classic, use the Create New Task action to create a task directly from the post.

[View Recommendations That Are Tailored to You](#)

Chatter provides recommendations to help you identify the people, groups, files, and records that closely relate to your job and interests.

[Searching in Feeds](#)

Quickly find information in posts and comments across Chatter.

[Chatter Favorites Overview](#)

In Salesforce Classic, Chatter favorites give you easy access to list views, Chatter feed searches, and topics that you want to stay on top of. You can find Chatter favorites on the Chatter tab.

Chatter Feeds Overview

Follow people and records to see updates about them in Chatter. Updates appear in feeds on profiles, groups, the Chatter tab, topic detail pages, and on record detail pages.

Typically, following lets you see updates about:

- Feed comments and posts
- Posts, comments, and files on Chatter groups that you're a member of
- Shared files and links
- Tasks and events
- Converted leads
- Record field changes, like changes to record owner and closed opportunities and cases.

Record updates are also called system-generated posts and feed tracked changes. They are updates that Salesforce automatically generates when someone creates a record or changes a tracked field on a record. The record updates that you see depend on how your administrator has configured feed tracking and whether you have access to the record. You don't see tracked feed updates that are older than 45 days and have no likes or comments, because they are deleted automatically. Tracked changes in a feed can be bundled together for quick and easy reading.

 **Note:** In Lightning Experience, the What I Follow feed on the Chatter home page has a **Fewer Updates** filter for omitting system-generated posts from your feed view.

Printing is supported only for Chatter feeds associated with a case. See [Printable View in Case Feed](#).

SEE ALSO:

[Share a Chatter Post](#)

EDITIONS

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

View a Particular Feed

Change your Chatter feed to show a subset of posts.

The landing feed on the Chatter home page is shown when a user navigates to the page, returns to it, or refreshes it. For most people, the landing feed is a form of the What I Follow. However, in Lightning Experience, if a user is following fewer than 10 things, their default feed is a form of Company Highlights. With Company Highlights as their landing feed, new users have a chance to see the most active conversations in their company. Seeing what's most active can inspire ideas about more things to follow. When a user follows more than 10 things, the default feed changes to What I Follow.

 **Note:** On most feeds, filters are sticky. That is, they persist until you change them. The landing feed is the exception. For the landing feed, your filter selection doesn't persist when you leave the Chatter tab and then return to it. But the landing feed differs from the feed that you see when you specifically choose What I Follow or Company Highlights. The actual What I Follow and Company Highlights feeds have sticky filters: For example, apply a filter like All Updates on What I Follow, then navigate away. When you return to What I Follow, the All Updates filter still applies.

Use the feed selections on the left sidebar of the Chatter home page to view a subset of posts in your feed. For example, view only posts that mention you, or posts that you bookmarked, or the top posts in your company.

- To see available feeds in the left column of the page, click the Chatter tab.
- To limit what's shown in the feed to a subset of posts, click a feed that's listed in the left column.

– What I Follow

Shows updates for everything you follow, including posts from people you follow, groups you are a member of, and files and records you're following. Users who follow a record, see those updates in their view of What I Follow, with one exception. Feed-tracked changes that users make themselves aren't posted to What I Follow. Use the sorting and filtering options at the top of your feed to further narrow the subset of posts.

– To Me

Shows the posts on your profile page, including:

- Posts others make on your profile page
- Posts and comments where you have been mentioned
- Any of your posts that have comments

– Bookmarked

Shows the posts that you've bookmarked.

– Muted (Salesforce Classic)

Shows all the posts that you've muted. You can unmute a post here.

– All Company (Salesforce Classic)

Shows posts and comments from your entire company, including posts and comments from:

- People in your company
- Public groups
- Private groups you're a member of
- Feed tracked changes for records and fields and system-generated posts, provided someone has liked or commented on the post. You must have access to the record to see the post.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- Company Highlights (Lightning Experience)

Shows the most popular posts across your entire company and the posts with lots of comments, likes, and views.

- My Drafts (Lightning Experience)

Shows posts that you're in the process of writing but haven't posted yet. Draft posts are saved automatically to My Drafts after seven seconds. They are removed from My Drafts when you post them.

SEE ALSO:

[Filter Your Files List](#)

[Feed Sort and Filter Options](#)

Filter and Sort Your Feeds

In your feeds, use the filter and sort options to see updates that are relevant to you.

Filtering and sorting your feed is useful when you want to view a particular set of posts instead of all posts.

[Filter Your Feed](#)

Use filters to limit what appears in your feed to the items that match the selected filter.

[Sort Your Feed](#)

Sort your feed by the latest posts or the most recent comments.

[Feed Sort and Filter Options](#)

On any feed, the sort and filter options vary, depending on how your administrator sets up Salesforce and which feed you're viewing. Not all sort and filter options are available on all feeds.

Filter Your Feed

Use filters to limit what appears in your feed to the items that match the selected filter.

In Chatter, the filters that you see depend on how your administrator has set up Salesforce. Filter feeds on the Chatter page, your profile, group pages, record detail pages, and search result pages. Not all filters are available on all feeds.

On most feeds, filters are sticky. That is, they persist until you change them. The landing feed is the exception. For the landing feed, your filter selection doesn't persist when you leave the Chatter tab and then return to it. The landing feed is the feed that you see when you navigate to the Chatter tab. Typically, it's a form of the What I Follow Feed. For Lightning Experience, if you haven't followed 10 or more things, the landing feed is a form of the Company Highlights feed. But the landing feed differs from the feed that you see when you specifically choose What I Follow or Company Highlights. The actual What I Follow and Company Highlights feeds have sticky filters: For example, apply a filter like All Updates on What I Follow, then navigate away. When you return to What I Follow, the All Updates filter still applies.

- In Salesforce Classic, click  next to **Show** and select a filter option. In Lightning Experience, click the filter feed icon next to the feed search field.

EDITIONS

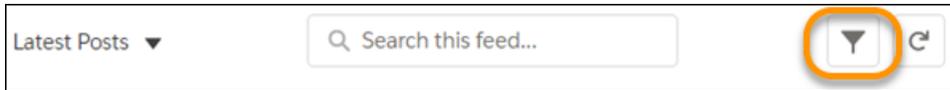
Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

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Here are some of the filters that can appear on the list.

– All Updates (Default)—Shows all posts and comments from:

- The people and records that you follow
- Posts from the groups that you're a member of
- All [system-generated posts](#)

 **Note:** In the What I Follow feed, you see system-generated posts for changes to the tracked fields on all the people and entities that you follow. You don't see system-generated posts for your own changes to tracked fields. To see system-generated posts for your own changes, look in your profile feed.

 **Important:** When you use the All Updates filter on a Lightning record page with custom components, you could notice a performance slowdown. To improve general page loading performance, the page loads in a specific order. Your page first loads the top feed items, then all components, then the remaining feed items. Custom components can require increased loading time, which delays loading times for the remaining feed items.

– Fewer Updates

- Shows all posts and comments from the people and records that you follow and the groups that you're a member of.
- Hides system-generated posts from records that nobody has commented on.

– People—Shows the posts and comments from the people that you follow.

– Groups—Shows the posts in the groups that you're a member of.

– Files—Shows posts that include:

- Files that you follow.
- File posts that someone you follow has commented on.

 **Example:** Use the Fewer Updates filter to hide system-generated posts. For example, you're following the Acme account, and the account executive for Acme creates an opportunity. Later, the account executive changes a tracked field on the Acme account. In both cases, Salesforce automatically generates an update about each change. Salesforce posts these updates to both your Chatter feed and the feed on the Acme account detail page. The Fewer Updates filter hides these system-generated posts in your feed, unless someone has commented on the posts. If you want to see the system-generated posts, select the All Updates filter.

SEE ALSO:

[Feed Sort and Filter Options](#)

Sort Your Feed

Sort your feed by the latest posts or the most recent comments.

1. Above a feed, click  the Sort by menu.
2. To sort the feed by the most recent posts, select **Latest Posts**. To sort the feed by the most recent comments, select **Most Recent Activity**.

By default, a feed is sorted by Most Recent Activity.

 **Example:** Here's one way to use sorting options effectively. Let's say you're following many people and records and have bookmarked the posts that you're interested in. At the end of your work day, you want to know whether there are any updates for your bookmarked posts. You click **Bookmarked** to view all your bookmarked posts and then sort the posts by Most Recent Activity. Posts are listed in the order of recent comments, starting with the post with the latest comment.

SEE ALSO:

[Filter Your Feed](#)

Feed Sort and Filter Options

On any feed, the sort and filter options vary, depending on how your administrator sets up Salesforce and which feed you're viewing. Not all sort and filter options are available on all feeds.

On most feeds, filters are sticky. That is, they persist until you change them. The landing feed is the exception. For the landing feed, your filter selection doesn't persist when you leave the Chatter tab and then return to it. The landing feed is the feed that you see when you navigate to the Chatter tab. Typically, it's a form of the What I Follow Feed. For Lightning Experience, if you haven't followed 10 or more things, the landing feed is a form of the Company Highlights feed. But the landing feed differs from the feed that you see when you specifically choose What I Follow or Company Highlights. The actual What I Follow and Company Highlights feeds have sticky filters: For example, apply a filter like All Updates on What I Follow, then navigate away. When you return to What I Follow, the All Updates filter still applies.

This table shows the sort and filter options that are available with each Chatter feed.

Feed	Available Sort and Filter Options
What I Follow	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic • All Updates (Filter) Lightning Experience, Salesforce Classic • Fewer Updates (Filter) Lightning Experience, Salesforce Classic • People (Filter) Salesforce Classic • Groups (Filter) Salesforce Classic • Files (Filter) Salesforce Classic

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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Feed**Available Sort and Filter Options**

	<ul style="list-style-type: none"> • Questions (Filter) Salesforce Classic • Reports (Filter) Salesforce Classic • Teams (Filter) Salesforce Classic • Work (Filter) Salesforce Classic
To Me	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic
Muted (Salesforce Classic)	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic
Bookmarked	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic
All Company (Salesforce Classic)	<ul style="list-style-type: none"> • Latest Posts (Sort) Salesforce Classic • Most Recent Activity (Sort) Salesforce Classic
Company Highlights (Lightning Experience)	<ul style="list-style-type: none"> • Top Posts (Sort) Lightning Experience • Latest Posts (Sort) Lightning Experience • Most Recent Activity (Sort) Lightning Experience
Group	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic • All Updates (Filter) Lightning Experience, Salesforce Classic • Fewer Updates (Filter) Salesforce Classic • Unread Posts (Filter) Lightning Experience • All Questions (Filter) Lightning Experience • Unanswered Questions (Filter) Lightning Experience • Questions with No Best Answer (Filter) Lightning Experience • Questions with Best Answer (Filter) Lightning Experience
Profile	<ul style="list-style-type: none"> • Latest Posts (Sort) Lightning Experience, Salesforce Classic • Most Recent Activity (Sort) Lightning Experience, Salesforce Classic • All Updates (Filter) Lightning Experience • Posts by This User (Filter) Lightning Experience

Feed

Record

Available Sort and Filter Options

- Latest Posts (Sort) Lightning Experience, Salesforce Classic
- Most Recent Activity (Sort) Lightning Experience, Salesforce Classic
- All Updates (Filter) Salesforce Classic
- Internal Only (Filter) Salesforce Classic
- Fewer Updates (Filter) Salesforce Classic

SEE ALSO:

[Filter Your Feed](#)[Sort Your Feed](#)**Keep Track of Posts with Bookmarks**

Bookmarking lets you track posts that you're interested in.

Bookmark a post by selecting **Bookmark** from the post's overflow menu. After you bookmark a post, you can find it again easily through the **Bookmarked** feed on the left sidebar of the Chatter home page. The **Bookmarked** feed is personal. It shows only the posts that you have bookmarked. Other users can't see which posts you've bookmarked.

When someone comments on a post that you bookmarked, you're notified by email. Bookmark notifications are enabled by default, but you can change your [email notifications](#) on page 25.

There's no limit on the number of bookmarks that you can add. When you're no longer interested in a bookmarked post, you can remove the bookmark by selecting **Remove Bookmark** from the post's overflow menu. This action removes the post from the **Bookmarked** feed.

[Bookmark a Post](#)

You can use bookmarks to track the posts you want to get back to. And you can view bookmarked posts in the Bookmarked feed.

[Remove a Bookmark](#)

When you remove a bookmark from a post, the post no longer appears in the Bookmarked feed.

SEE ALSO:

[Like Posts and Comments](#)[View a Particular Feed](#)[Guidelines for Managing Your Personal Chatter Email Settings](#)**EDITIONS**

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Bookmark a Post

You can use bookmarks to track the posts you want to get back to. And you can view bookmarked posts in the Bookmarked feed.

1. To expand the actions menu, click  at the top-right corner of the post you want to bookmark.
2. Click **Bookmark**.
In Salesforce Classic, the bookmark icon () appears next to the post. In Lightning Experience, the corner of the post is marked with a star ().

On the Chatter page, click **Bookmarked** to see your bookmarked posts.

You can add as many bookmarks as you like.

SEE ALSO:

[Like Posts and Comments](#)

Remove a Bookmark

When you remove a bookmark from a post, the post no longer appears in the Bookmarked feed.

1. From the Chatter home page, click the Bookmarked feed.
2. Find the post whose bookmark you want to remove.
3. Open the post's overflow menu by clicking .
4. Select **Remove Bookmark**.

Create a Task from a Post

Read a post that you want to follow up on? In Salesforce Classic, use the Create New Task action to create a task directly from the post.

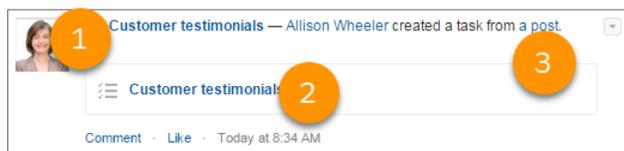
You can create a task from anyone's post, including posts with attachments. You can't create a task from a system-generated post, like a record update.

1. Click the post's overflow menu .
2. Select **Create New Task**.

If you don't see the Create New Task action, ask your Salesforce administrator to enable this action for your organization.

3. In the Create New Task dialog, add a subject and a due date. If applicable, associate the task with a contact or lead and an object, like an account. Use the search boxes to find available contacts, leads, and objects.
4. When you're done, click **Create**.

The task is assigned to you and posted to your profile feed. The task also appears in the My Tasks section on your Home tab.



Click the task subject link (1 or 2) to open the task. Click the post link (3) to navigate to the post where the task was created.

EDITIONS

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View Recommendations That Are Tailored to You

Chatter provides recommendations to help you identify the people, groups, files, and records that closely relate to your job and interests.

The more recommendations you accept, the more updates you see in your feed.

On the list of recommendations:

- Click **Follow** next to the person, record, or file you want to follow.
- To become a group member, click **Join**.
- To dismiss a recommendation, click **x**.
- To go to the Recommendations page, click **More**. On the Recommendations page, you can use filters to narrow your recommendations to people, files, records, or groups.

SEE ALSO:

[People Recommendations](#)

[Chatter Group Recommendations](#)

[Record Recommendations](#)

[File Recommendations](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Searching in Feeds

Quickly find information in posts and comments across Chatter.

- Use the header search box (Global Search) to find information in feeds across Chatter.
- To find information in a specific Chatter feed, use [feed search](#) () in that context.
- To create a quick shortcut to a frequently performed search in Chatter, [save a feed search as a favorite](#) and click the favorite link from the Chatter page.

[Maximum Sizes by File Type in Chatter Search](#)

The following file types and sizes are supported when you search Chatter.

[Chatter Feed Search Results](#)

Searches in Chatter feeds return the posts and comments that include your search terms. These results are the same whether your search is global or feed-level.

[Search a Feed](#)

Use feed search to find information in the current feed.

Maximum Sizes by File Type in Chatter Search

The following file types and sizes are supported when you search Chatter.

Search supports several file types and has file size limits. If a file exceeds the maximum size, the file's content isn't searched, but the file's name, description, type, and owner are.

File Type	File Extensions	Maximum File Size for Search
HTML	.htm, .html, .xhtml	5 MB

File Type	File Extensions	Maximum File Size for Search
PDF	.pdf	25 MB
PPT	.ppt, .pptx, .pptm	25 MB
RTF	.rtf	5 MB
Text	.c, .cpp, .css, .csv, .ini, .java, .log, .sql, .txt	5 MB
Word	.doc, .docx, .docm	25 MB
XLS	.xls, .xlsx, .xlsm	5 MB
XML	.xml	5 MB

Chatter Feed Search Results

Searches in Chatter feeds return the posts and comments that include your search terms. These results are the same whether your search is global or feed-level.

Watch a Demo: [▶ Search in Salesforce Classic](#)

Changes to record fields aren't included in search results. For example, imagine that you have enabled feed tracking on the `Billing Address` field for the Acme account. Then you modify the Acme billing address. Search results for `Acme` don't include *Acme — Suzanne Powell changed Billing Street to 10 Main Road.*

You can perform many of the same actions in your feeds search results as you can in a feed.

- Sort your search results by posts only or by posts and comments.
- Comment on, like, share, bookmark, and delete posts.
- Add, edit, or delete topics on posts.
- Follow, share, download, preview, and upload new versions of files.
- View the detail pages for Chatter files, groups, topics, and people by clicking the respective name in the update.
- [View a single feed update](#) by clicking the timestamp below the update, for example, **Yesterday at 12:57 AM**.
- On the Chatter tab in Salesforce Classic, click **Add to Favorites** to save a Chatter feed search to your [favorites](#).

In Salesforce Classic, to view search results for records, such as accounts, contacts, people, groups, topics, and files, click **Records** at the top left of the page. In Lightning Experience, you can focus in on one type of object by clicking that object name in the left column of search results. To view results for various objects, click **Top Results**.

 **Tip:** For a more focused search of the feeds in a specific group, profile, record, or other Chatter feed, use [feed search](#).

Salesforce supports hyperlinks and entity links, but only hyperlinks are searchable. An entity link is a user at-mention or a record slash-mention. An easy way to tell if a link is a hyperlink or entity link is to hover over the link in a post. If a hover card pops up with details about the user or record, then it's an entity link. If there's no hover card but instead a tooltip with the link url, then it's a hyperlink.

Search a Feed

Use feed search to find information in the current feed.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Available in: both Salesforce Classic and Lightning Experience

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

You can search for information in the current feed on records, groups, topic pages, user profiles, and on the Chatter and Home tabs. (The Home tab is available in Salesforce Classic only.)

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

You can search for hashtag topics, mentions, and files posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases. To search for hashtag topics with multiple words, use brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type `#[universal paper]` in the search box.

Search results display with matching terms highlighted. Filters or sorting criteria used in the feed apply to feed search results as well.

Click  to clear your search terms and return to the feed.

Feed search behavior can vary slightly depending on where you perform the search.

- Feed search isn't supported for feeds on list views.
- You can search only the feeds you have access to via sharing rules.
- On the Chatter tab, feed search results are also limited by your [feed type selections](#). For example, if you select the To Me feed, and then apply [filters](#) and [sorting criteria](#), all of those criteria also apply to the results.
- Feed search results are limited to the [posts that are accessible](#) from the context you search within. For example, if you search the feed on a user's profile, the results include the posts and comments accessible from the user's profile. Both the posts and comments that are shared by or with the user are included.
- Feed search returns matches for file or link names that are shared in posts, but not in comments, and only includes the first attachment. For example: if you attach `file1.pdf`, `file2.pdf`, and `file3.pdf` to a post, where `file1.pdf` is the first file you attach, only `file1.pdf` is included in the search results.
- Record field changes aren't included in record feed search results.

Chatter Favorites Overview

In Salesforce Classic, Chatter favorites give you easy access to list views, Chatter feed searches, and topics that you want to stay on top of. You can find Chatter favorites on the Chatter tab.

Available in: Salesforce Classic

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

For example, imagine that you and your coworkers use the hashtag topic #acme to track information about your customer Acme. Consider adding #acme as a favorite so you can easily access these updates without leaving the Chatter tab.

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

Chatter shows the four favorites most recently added or viewed.

- Click a favorite to see the updates.
- To see all your favorites, click *n* **more**.

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

[Add a Chatter Feed Search as a Favorite](#)

In Salesforce Classic, add a Chatter feed search as a favorite to access feed updates quickly without leaving the Chatter tab.

[Add a Topic as a Favorite](#)

Add a topic as a favorite to quickly see the latest on the topics you're interested in.

[Add a List View as a Chatter Favorite](#)

To monitor key business processes directly from your Chatter tab, add a list view as a Chatter favorite.

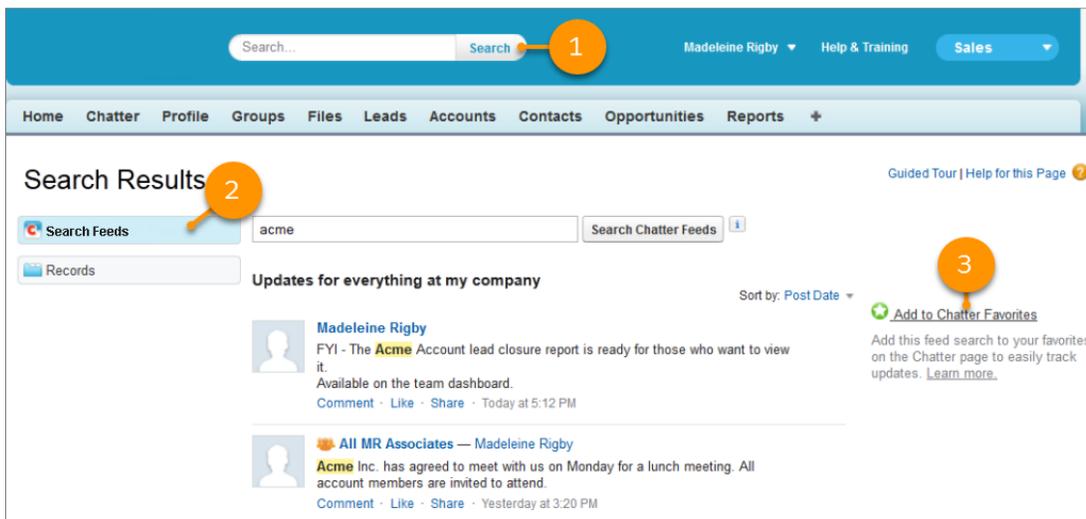
Add a Chatter Feed Search as a Favorite

In Salesforce Classic, add a Chatter feed search as a favorite to access feed updates quickly without leaving the Chatter tab.

EDITIONS

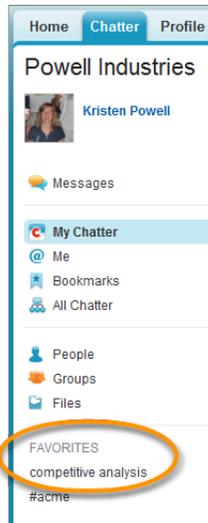
Available in: Salesforce Classic ([not available in all orgs](#))

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



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

 **Example:** Here's a favorite search on the terms *competitive analysis*.



The favorite name on the Chatter page is the same as the search terms that you entered.

-  **Tip:** You can save a search for a Chatter group name as a favorite for quick access the group feed from the Chatter page. Similarly, you can save a search for a person's name as a favorite for quick access to that person's posts, comments, and mentions.

SEE ALSO:

[Chatter Feed Search Results](#)

Add a Topic as a Favorite

Add a topic as a favorite to quickly see the latest on the topics you're interested in.

Available in: Salesforce Classic

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

1. In Salesforce Classic, click a topic name to navigate to the topic detail page.
2. In the upper-right corner of the page, click , and choose **Add to Favorites**. The favorite name is the same as the topic name.

-  **Tip:** When viewing a topic favorite, you can click the topic name at the top of the feed to go directly to the topic detail page.

SEE ALSO:

[Topics List](#)

Add a List View as a Chatter Favorite

To monitor key business processes directly from your Chatter tab, add a list view as a Chatter favorite.

Available in: Salesforce Classic ([not available in all orgs](#))

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

1. Open a list view or create one for a set of records, like accounts, opportunities, or leads.
2. To see the Chatter updates for the list items, click  **Feed** in the top-right corner.
3. Click **Add to Favorites**.
The favorite name on the Chatter tab is the same as the list view name.

SEE ALSO:

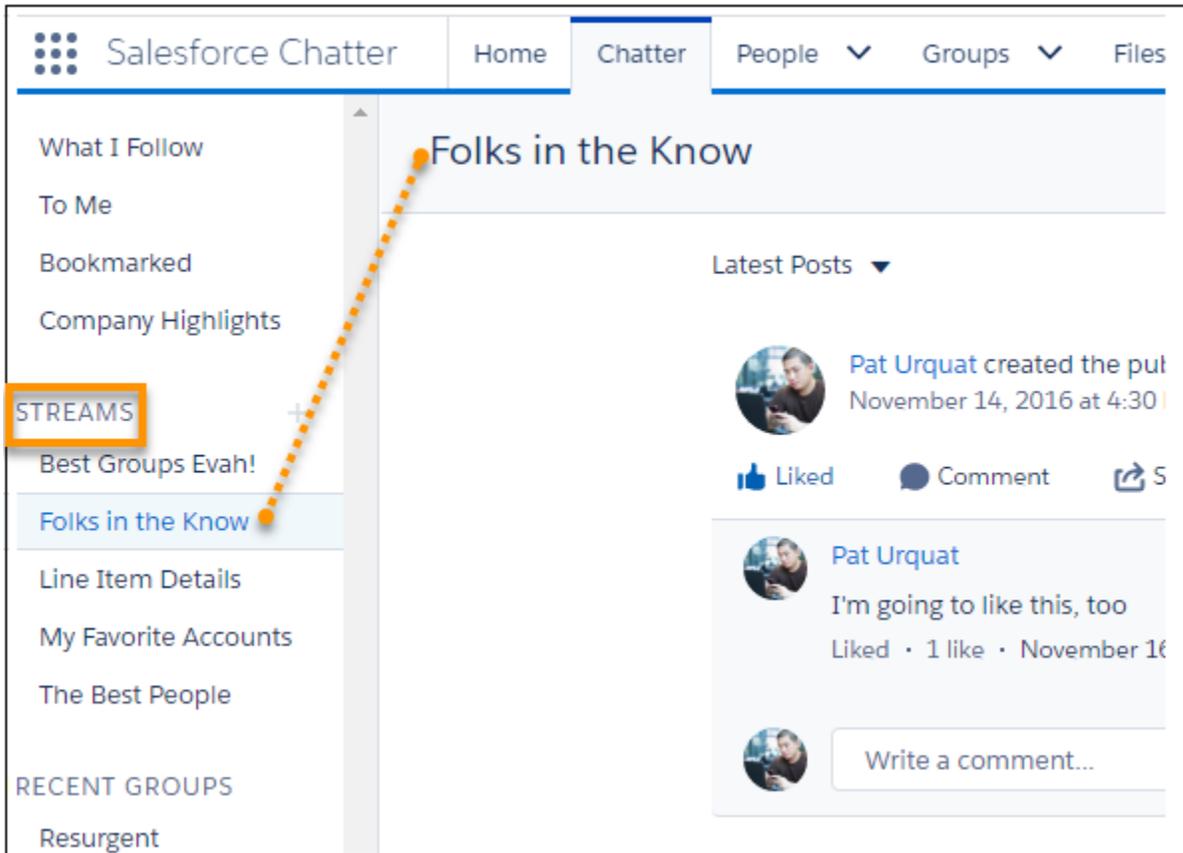
[Viewing Record Feeds](#)

Chatter Streams

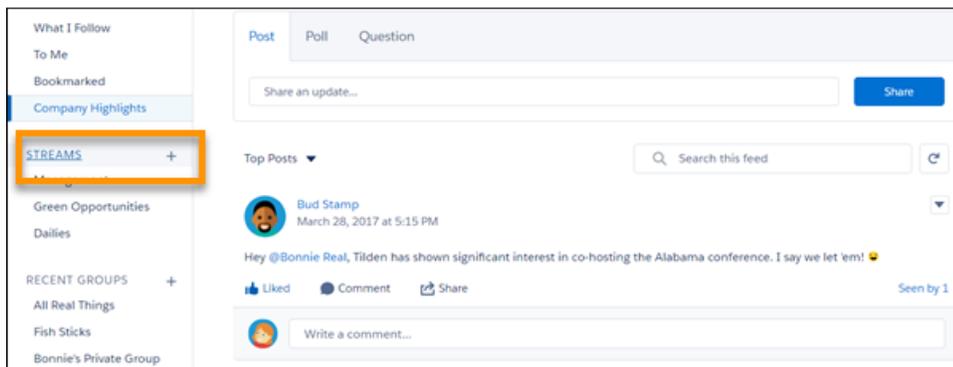
Chatter streams are custom feeds that you create by combining multiple related feeds into one feed. Look for streams on your Chatter home page. Create up to 100 streams that each combine posts from up to 25 different feeds and feed types. Create streams that combine feeds from people, groups, and records, like accounts, opportunities, cases, and more.

EDITIONS

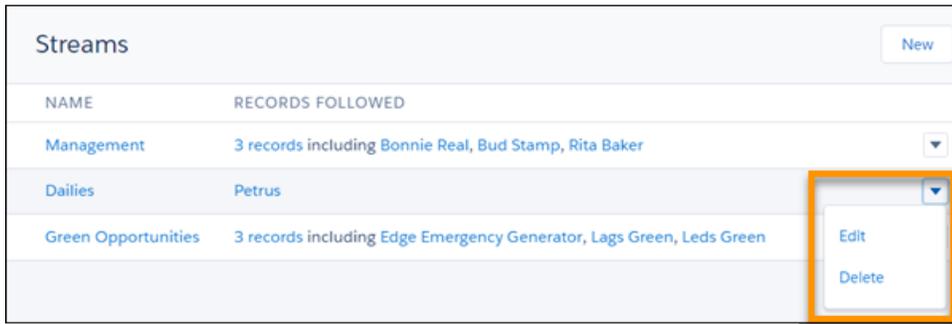
Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Contact Manager**, and **Developer** editions



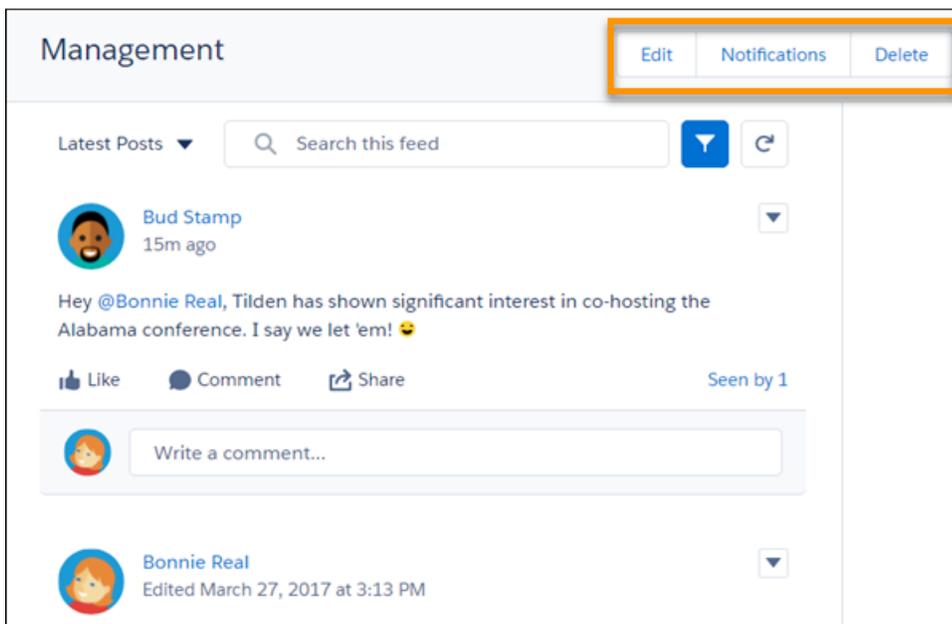
Visit the stream home by clicking the Streams heading on the Chatter home page.



The streams home lists all your streams and shows the people and records that you added. Each stream has its own row and its own set of row actions, including **Edit** and **Delete**.

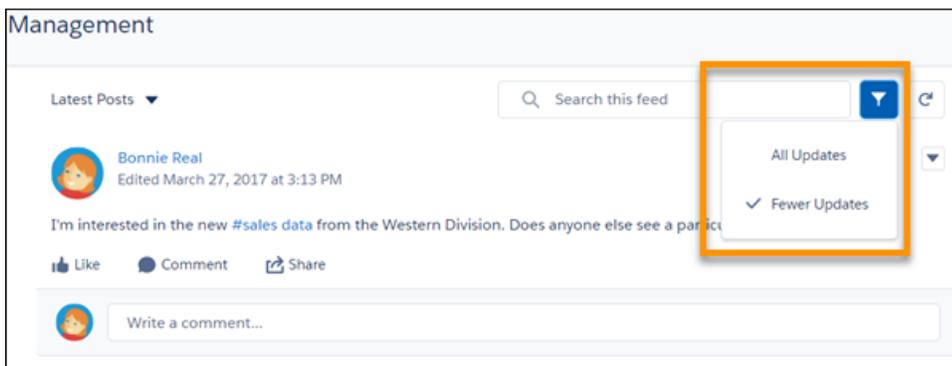


Click the number of records on a row to see a full list of people and records that you added to the stream.
 Click a stream name to open that stream. Once there, you can see that the stream page has some actions of its own.



Use these actions to edit the stream, set up stream notifications, and delete the stream.

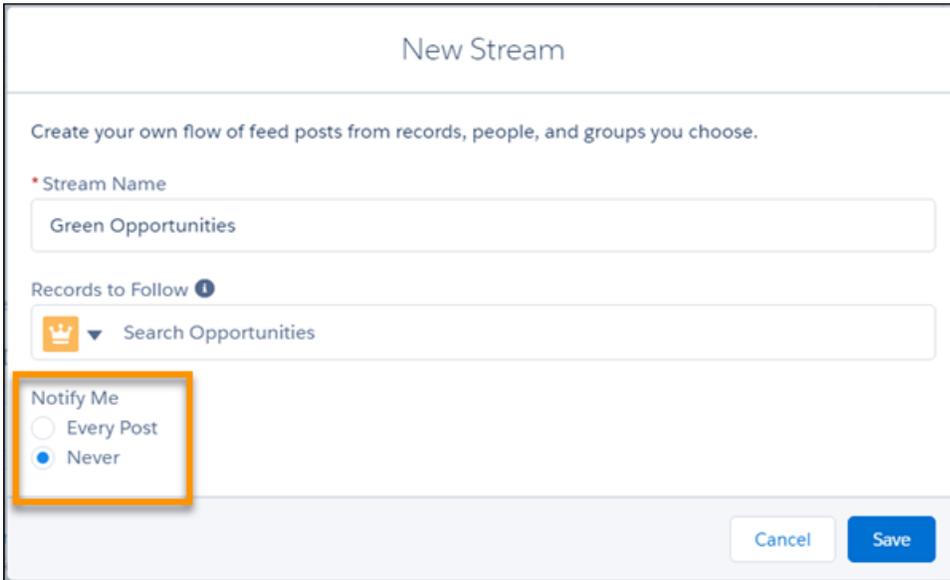
Each stream has a couple of filters. Choose **All Updates** to see everything, including Feed Tracked Changes (FTCs) in the stream. Choose **Fewer Updates** to omit FTCs from the stream.



-  **Note:** Feed tracking tracks changes to objects and fields and posts them as updates in Chatter. Users who follow a record see updates to that record in their Chatter feed.

When you create a stream, an **Every Post** option is available in the create dialog for enabling notifications for the stream. **Every Post** is the default setting. Notifications are sent to you via email and are pushed to your in-app notifications. Select **Never** to prevent notifications from this stream. You can also visit a stream page to adjust its notification settings.

-  **Note:** Currently, activity on a topics feed in a stream doesn't trigger notifications.



-  **Note:** Because a stream is made up of multiple feeds, no publisher is provided for posting to a stream.

Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

[Create Chatter Streams](#)

Create a Chatter stream to get a combined view of feeds from the profiles, groups, and records that you select. Include up to 25 feeds in each stream. Create up to 100 Chatter streams. You don't have to follow a person, group, or record before you add it to a stream. The great thing about adding a feed to a stream is that it doesn't count against the number of follows you're allowed. You can create a Chatter stream from the Chatter home page, from the streams home page, and from a profile or record detail.

[Edit a Chatter Stream](#)

Edit a stream to change its name or to add or remove some of its feeds. You can edit a Chatter stream from the streams home page or from the stream itself.

[Set Up Notifications for a Chatter Stream](#)

Notification settings are available in the New Stream dialog and on the stream itself. You can create a stream and decide later whether you want to be notified when new posts are added to a stream. The default is to send a notification for every new post. So if you create a stream without touching its notification settings, you receive email and in-app notifications for that stream. If you like, you can change your selection later in the stream feed.

[Delete a Chatter Stream](#)

You can delete a Chatter stream from the streams home page and from the stream itself. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for you to add more streams.

Create Chatter Streams

Create a Chatter stream to get a combined view of feeds from the profiles, groups, and records that you select. Include up to 25 feeds in each stream. Create up to 100 Chatter streams. You don't have to follow a person, group, or record before you add it to a stream. The great thing about adding a feed to a stream is that it doesn't count against the number of follows you're allowed. You can create a Chatter stream from the Chatter home page, from the streams home page, and from a profile or record detail.

[Create a Stream from the Chatter Home Page](#)

The Chatter home page lists up to five of your streams and provides a button for adding more.

[Create a Stream from the Streams Home Page](#)

You can get to the streams home page by clicking the Streams heading on the Chatter home page. The Streams home page has controls for managing existing streams and making new ones.

[Create a Stream from a Profile or Record Detail](#)

Once you create one stream, the **Follow** button on profile and record detail pages changes. A plus sign appears before the button label and more options become available for adding the profile or record feed to an existing stream. There's also an option to add the feed to a stream that you create on the spot.

SEE ALSO:

[Chatter Streams](#)

[Edit a Chatter Stream](#)

[Delete a Chatter Stream](#)

Create a Stream from the Chatter Home Page

The Chatter home page lists up to five of your streams and provides a button for adding more.

To create a Chatter stream, provide a title and select the feed types and feeds that you want in your stream.

1. Go to the Chatter home page, and click the **+** icon next to the Streams heading to open the New Stream dialog (1).
2. Enter a name for your stream.
3. In the **Records to Follow** field, click the down arrow (2) and choose a type of feed you want to add to your stream.

EDITIONS

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

EDITIONS

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

4. When you've made a selection, click in **Records to Follow** again and enter the name to search for (3).

-  **Note:** Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

5. Select a listed feed.

New Stream

Create your own flow of feed posts from records, people, and groups you choose.

* Stream Name

Groups of Sales

Records to Follow ⓘ

Fish Sticks × All Real Things × 4

Notify Me

Every Post

Never

Cancel Save

Repeat steps 3 through 5 until you have all the feeds (up to 25) that you want in this stream (4).

 **Note:** You can add up to 25 unique record, group, and profile feeds to a stream. If your access to any of the 25 is removed, the removed entity is still counted as part of the 25. You can't replace it with something else. But you can remove it from the stream to create room for another feed.

To include a person account in your stream, add it as an Account in the **Records to Follow** field. If you add a person account as a Contact, the related feed posts don't appear.

6. Set up notifications for this stream by selecting either **Every Post** or **Never** (5).

Every Post is the default. It gives you email and in-app notifications whenever a new post is added to the stream. **Never** turns off notifications for this stream.

7. To save your selections, click **Save**.

8. To save your stream, click **Save** again.

Your stream is listed in the left column on the Chatter home page, under the Streams heading (6). To open the stream, click its name.

 **Note:** If your stream isn't listed on the Chatter home page, click the Streams heading to go to the streams home page. All the streams that you created are listed there.

Create a Stream from the Streams Home Page

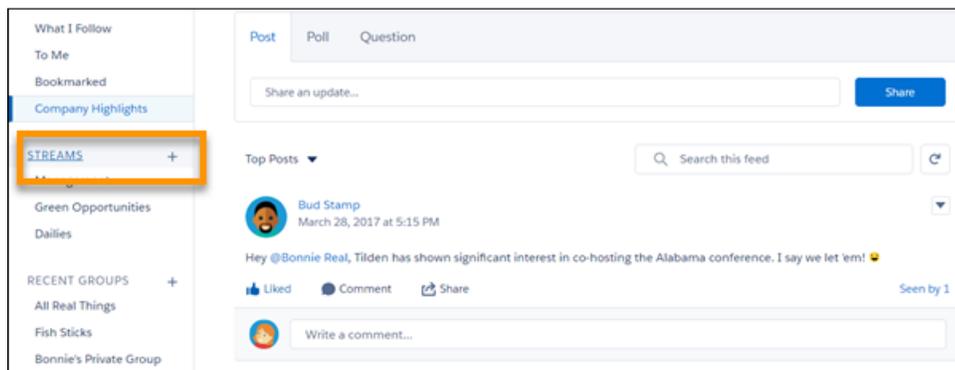
You can get to the streams home page by clicking the Streams heading on the Chatter home page. The Streams home page has controls for managing existing streams and making new ones.

To create a Chatter stream, provide a title and select the feed types and feeds that you want in your stream.

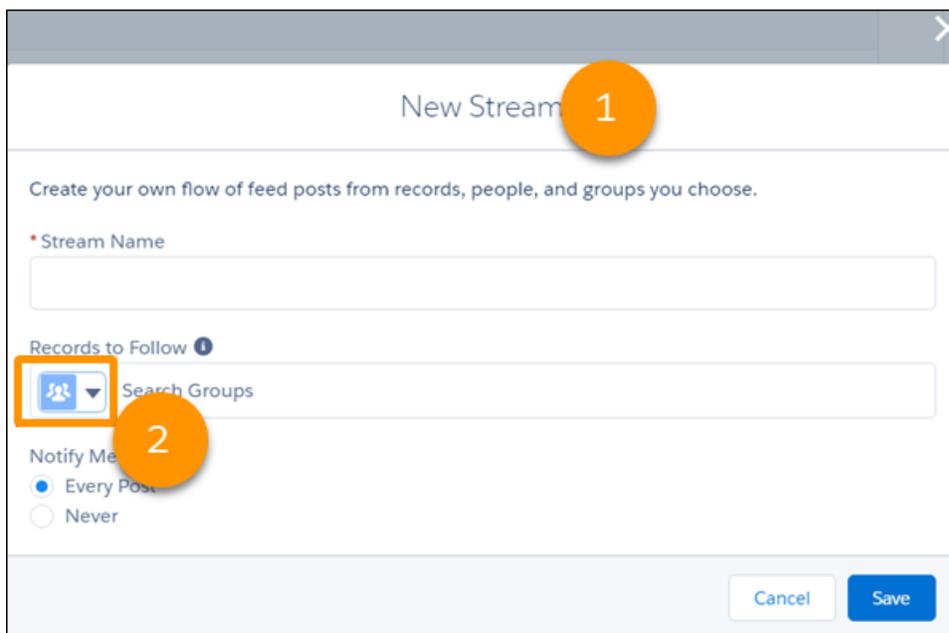
1. To open the Streams home page, go to the Chatter home page and click the Streams heading.

EDITIONS

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

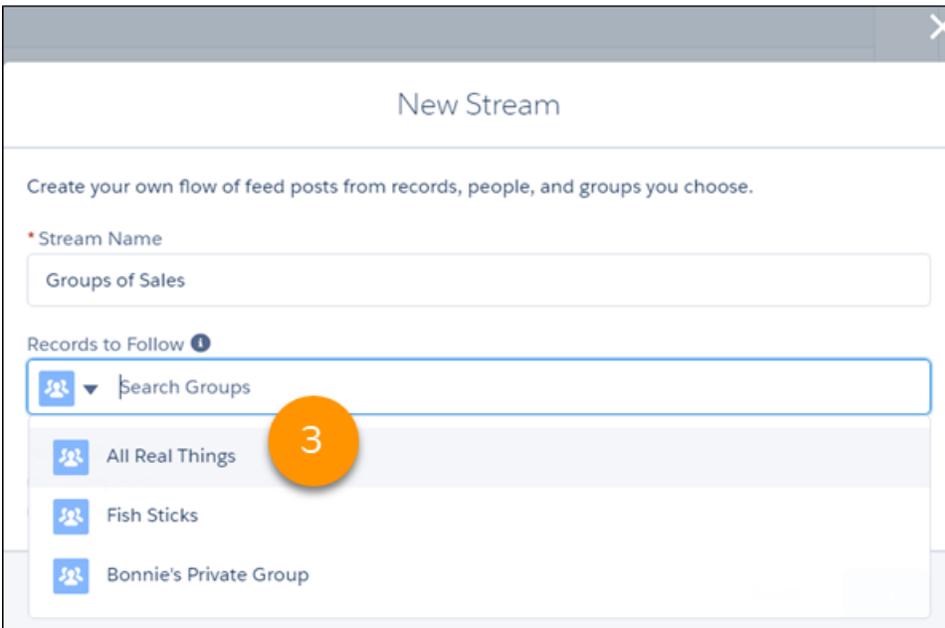


2. To open the New Stream dialog (1), click **New**.



3. Enter a name for your stream.
4. In the **Records to Follow** field, click the down arrow (2) and choose a type of feed to add to your stream.

5. When you've made a selection, click in **Records to Follow** again to search within the selected type of feed (3).



New Stream

Create your own flow of feed posts from records, people, and groups you choose.

* Stream Name

Groups of Sales

Records to Follow ⓘ

Search Groups

- All Real Things
- Fish Sticks
- Bonnie's Private Group

 **Note:** Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

6. Select a listed feed.

New Stream

Create your own flow of feed posts from records, people, and groups you choose.

* Stream Name

Groups of Sales

Records to Follow ⓘ

Fish Sticks × All Real Things × 4

Notify Me

Every Post

Never

Cancel Save

Repeat steps 3 through 5 until you have all the feeds (up to 25) that you want in this stream (4).

 **Note:** You can add up to 25 unique record, group, and profile feeds to a stream. If your access to any of the 25 is removed, the removed entity is still counted as part of the 25. You can't replace it with something else. But you can remove it from the stream and then add another feed.

To include a person account in your stream, add it as an Account in the **Records to Follow** field. If you add a person account as a Contact, the related feed posts don't appear.

7. Set up notifications for this stream by selecting either **Every Post** or **Never** (5).

Every Post gives you email and in-app notifications whenever a new post is added to the stream. **Never** turns off notifications for this stream.

8. To save your selections, click **Save**.
9. To save your stream, click **Save** again.

Your stream is listed in the left column on the Chatter home page, under Streams (6). To open the stream, click its name.

 **Note:** If your stream isn't listed on the Chatter home page, click the Streams heading to go to the streams home page. All the streams that you created are listed there.

Create a Stream from a Profile or Record Detail

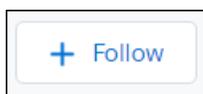
Once you create one stream, the **Follow** button on profile and record detail pages changes. A plus sign appears before the button label and more options become available for adding the profile or record feed to an existing stream. There's also an option to add the feed to a stream that you create on the spot.

Before you can create a stream from a profile or record detail, you must already have created at least one stream.

 **Note:** Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

1. Go to the profile or the detail page of a record that you want to add to a new stream.

2.

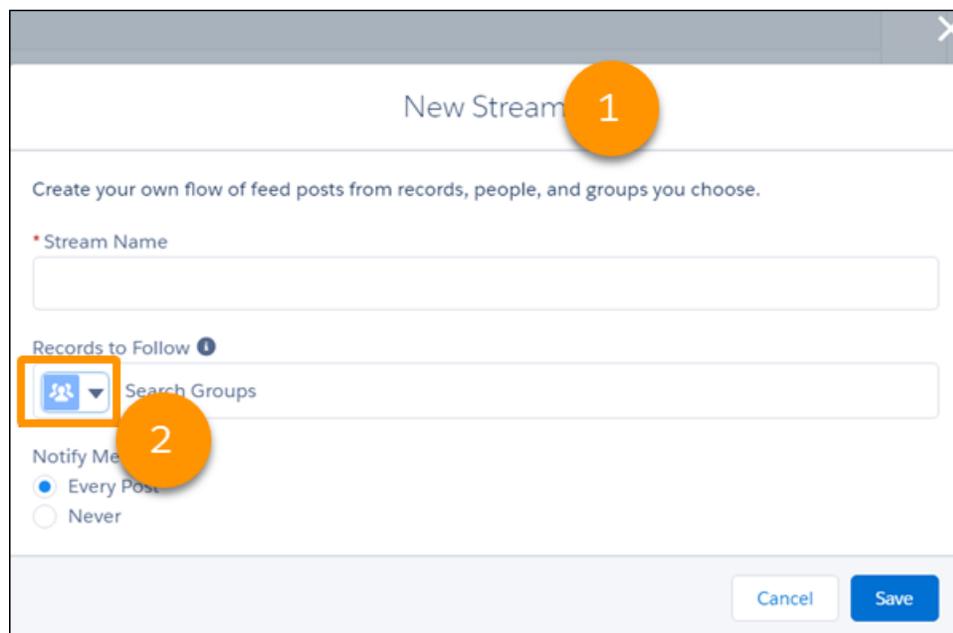


Click  **Follow**, and select **New Stream**.

3. Enter a name for your stream.

Notice the profile or record feed that you started from is already added to the **Records to Follow** field. To add more record or profile feeds, continue with Step 4. To finish the process, go to Step 7.

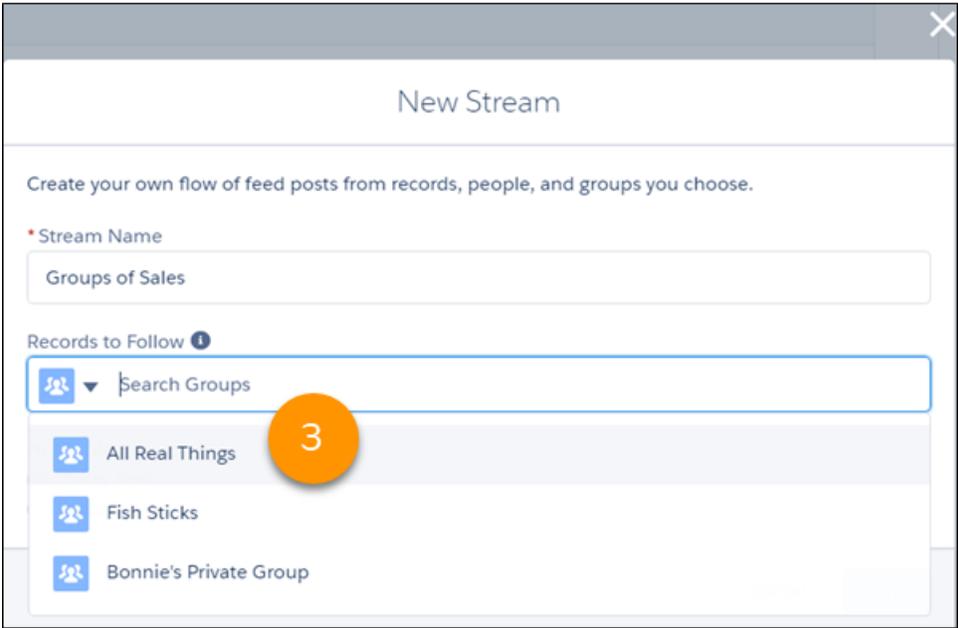
4. Click in the **Records to Follow** field, then click the down arrow (2) and choose a type of feed you want to add to your stream.



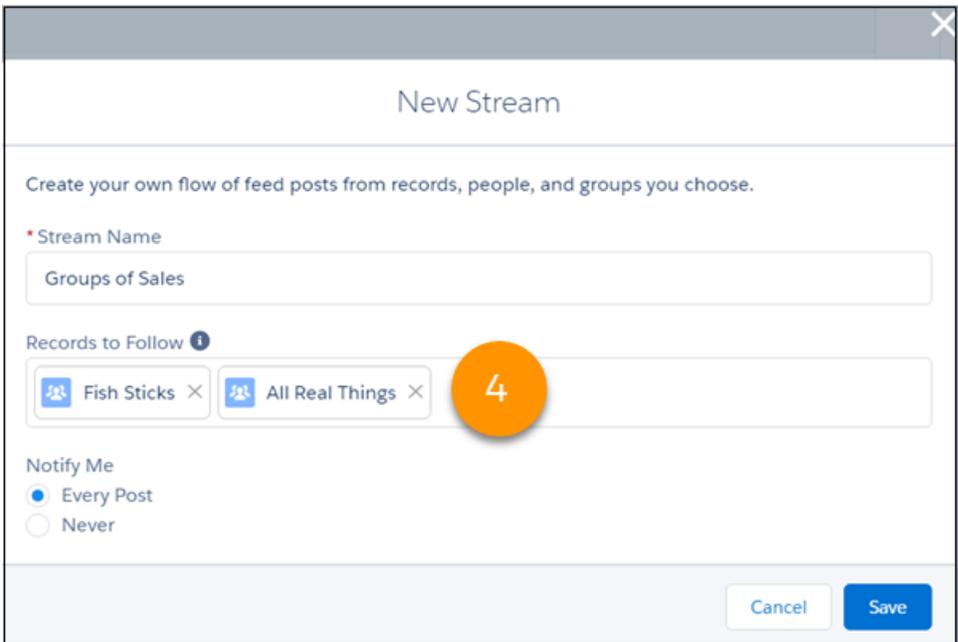
5. When you've made a selection, click in **Records to Follow** again and enter a search term to find a feed of that type (3).

EDITIONS

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



6. Select a listed feed.

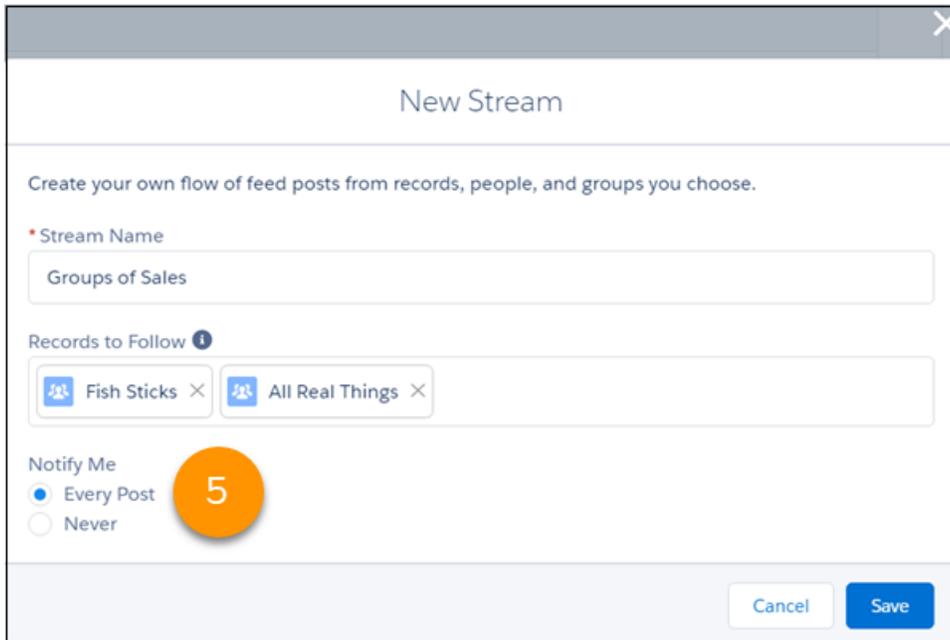


Repeat steps 4 through 6 until you have all the feeds (up to 25) that you want in this stream (4).

 **Note:** You can add up to 25 unique record, group, and profile feeds to a stream. If your access to any of the 25 is removed, the removed entity is still counted as part of the 25. You can't replace it with something else. But you can remove it from the stream to create room for another feed.

To include a person account in your stream, add it as an Account in the **Records to Follow** field. If you add a person account as a Contact, the related feed posts don't appear.

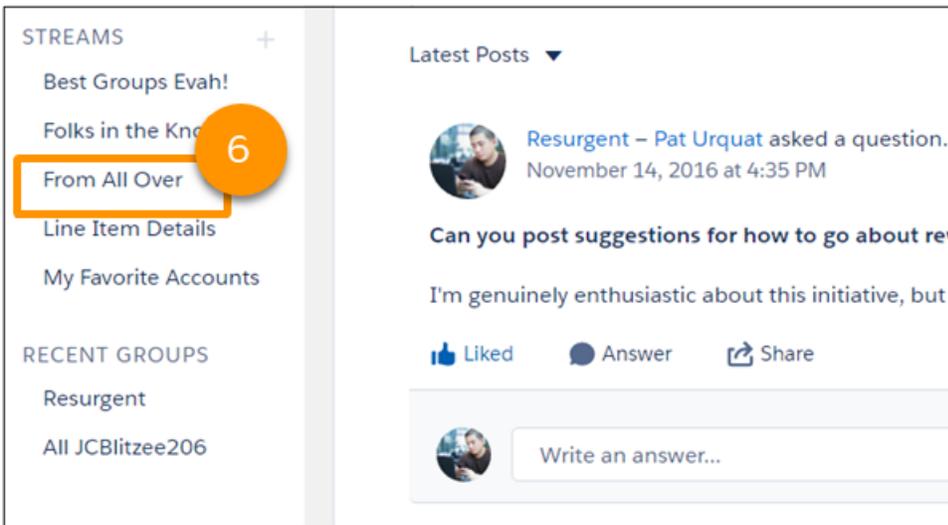
7. Set up notifications for this stream by selecting either **Every Post** or **Never** (5).



Every Post is the default. It gives you email and in-app notifications whenever a new post is added to the stream. **Never** turns off notifications for this stream.

8. To save your selections, click **Save**.
9. To save your stream, click **Save** again.

Your stream is listed in the left column on the Chatter home page, under the Streams heading (6). To open the stream, click its name.



 **Note:** If your stream isn't listed on the Chatter home page, click the Streams heading to go to the streams home page. All the streams that you created are listed there.

Edit a Chatter Stream

Edit a stream to change its name or to add or remove some of its feeds. You can edit a Chatter stream from the streams home page or from the stream itself.

[Edit a Chatter Stream from the Streams Home Page](#)

The streams home page lists all the streams you created. Each stream has its own list row that provides actions that you can perform on that stream, including the **Edit** action.

[Edit a Chatter Stream from the Stream](#)

Each stream has its own **Edit** action that you can access by navigating to the stream.

EDITIONS

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

SEE ALSO:

[Chatter Streams](#)

[Create Chatter Streams](#)

[Delete a Chatter Stream](#)

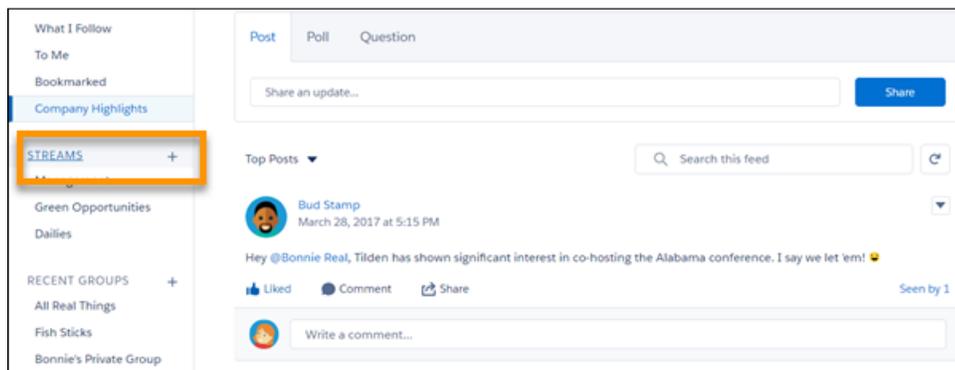
Edit a Chatter Stream from the Streams Home Page

The streams home page lists all the streams you created. Each stream has its own list row that provides actions that you can perform on that stream, including the **Edit** action.

1. Go to the Chatter home page, and click the Streams heading to open the streams home page.

EDITIONS

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



Streams		New
NAME	RECORDS FOLLOWED	
Management	2 records including Bonnie Real, Rita Baker	▼
Green Opportunities	3 records including Edge Emergency Generator, Lags Green, Leds Green	▼
Dailies	2 records including Petrus, Bonnie's Private Group	▼

2. On the row that lists the stream you want to edit, click the  menu icon, and select **Edit** to open the Edit Stream dialog.

3. Edit the stream.

- Edit the stream name.
- To add more feeds to the stream, click in the **Records to Follow** field to select a feed type. And follow the steps in [Create a Stream from the Streams Home Page](#).
- To remove a feed from the stream, click its **X** icon.

 **Note:** Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

4. To save your changes, click **Save**.

5. To save your stream, click **Save** again.

Edit a Chatter Stream from the Stream

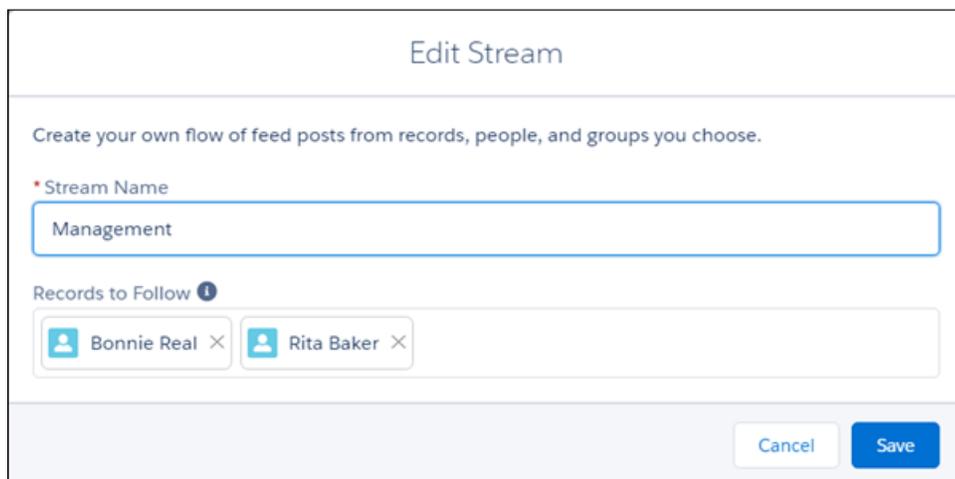
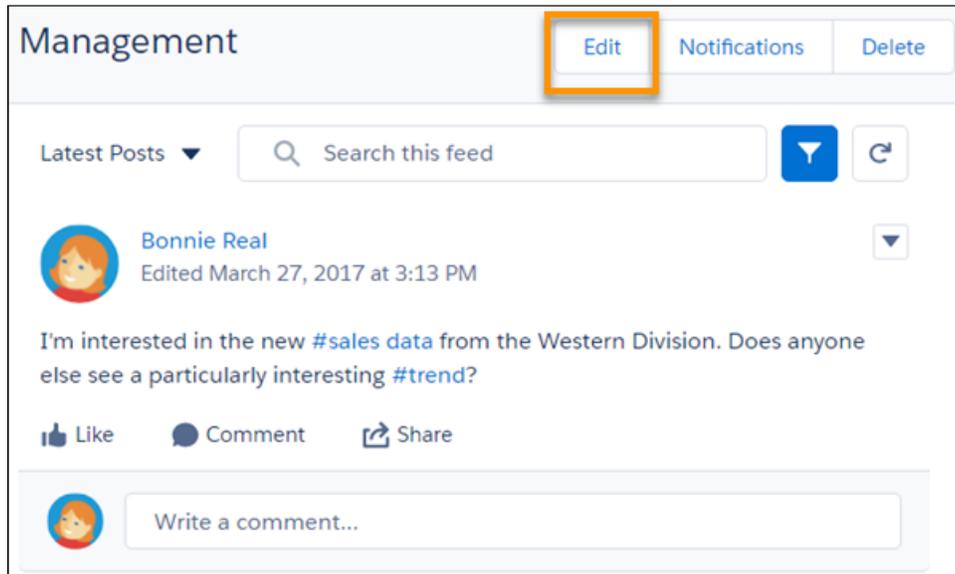
Each stream has its own **Edit** action that you can access by navigating to the stream.

The Chatter home page lists your five most recently accessed streams. Click a stream name to open it. If the stream you want to edit is not listed, click the Streams heading to navigate to the streams home page. There you can locate your stream, and click its name to open it.

1. Once you open the stream, click its **Edit** button to open the Edit Stream dialog.

EDITIONS

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



2. Edit the stream.

- Edit the stream name.
- To add more feeds to the stream, click in the **Records to Follow** field to select a feed type. And follow the steps in [Create a Stream from the Streams Home Page](#).
- To remove a feed from the stream, click its **×** icon.

 **Note:** Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

3. To save your changes, click **Save**.

4. To save your stream, click **Save** again.

Set Up Notifications for a Chatter Stream

Notification settings are available in the New Stream dialog and on the stream itself. You can create a stream and decide later whether you want to be notified when new posts are added to a stream. The default is to send a notification for every new post. So if you create a stream without touching its notification settings, you receive email and in-app notifications for that stream. If you like, you can change your selection later in the stream feed.

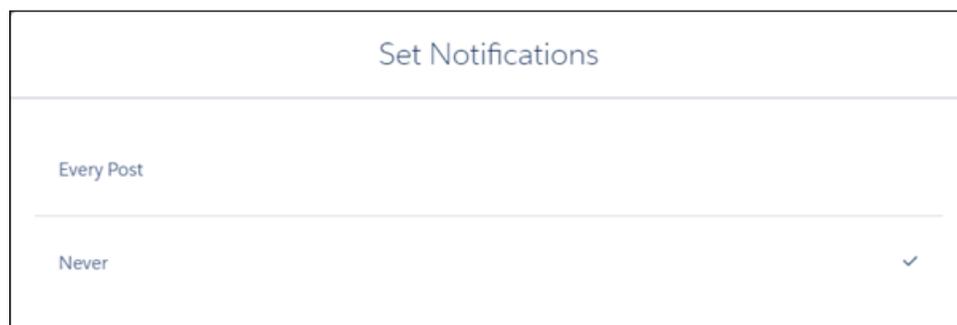
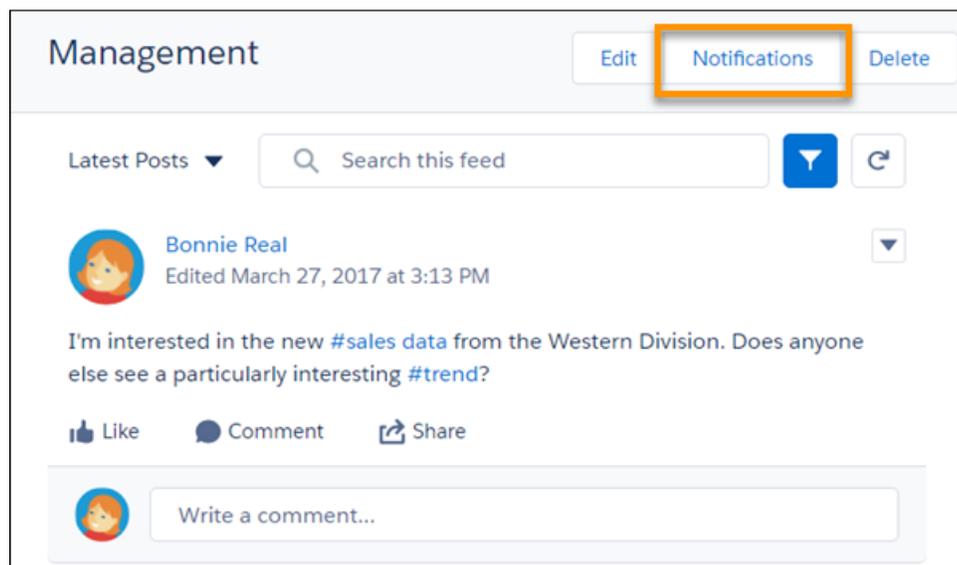
The Chatter home page lists your five most recently accessed streams. Click a stream name to open it. If the stream you want to set notifications for is not listed, click the Streams heading to navigate to the streams home page. There you can locate your stream, and click its name to open it.

 **Note:** Currently, activity on a topics feed in a stream doesn't trigger notifications.

1. Once you open the stream, click its **Notifications** button to open the Set Notifications dialog.

EDITIONS

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



2. Select a notifications option.

- **Every Post** to get an email and an in-app notification whenever a new post is added to the stream.
- **Never** to turn off notifications for this stream.

Delete a Chatter Stream

You can delete a Chatter stream from the streams home page and from the stream itself. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for you to add more streams.

[Delete a Chatter Stream from the Streams Home Page](#)

The streams home page lists all your streams, and each row provides a set of actions that you can perform on the listed stream. Actions include the **Delete** action. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for adding new streams.

[Delete a Chatter Stream from Within the Stream](#)

Once you navigate to a stream, a **Delete** action is available for deleting the stream. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for you to add more streams.

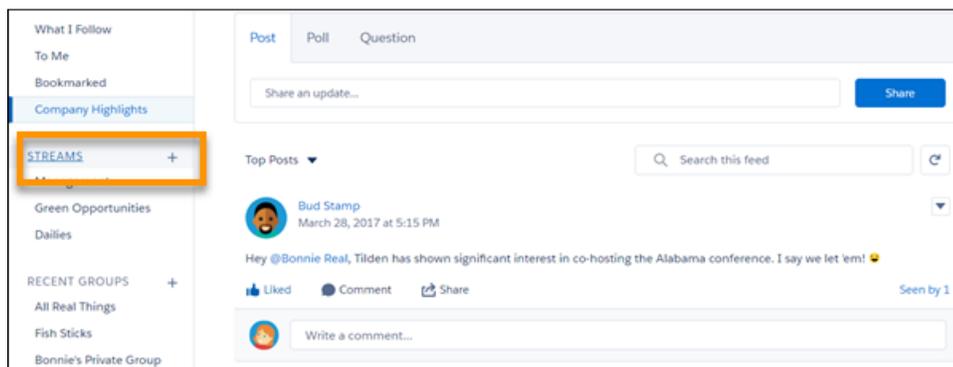
SEE ALSO:

- [Chatter Streams](#)
- [Create Chatter Streams](#)
- [Edit a Chatter Stream](#)

Delete a Chatter Stream from the Streams Home Page

The streams home page lists all your streams, and each row provides a set of actions that you can perform on the listed stream. Actions include the **Delete** action. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for adding new streams.

1. On the Chatter home page, click the Streams heading to open the streams home page.



EDITIONS

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

EDITIONS

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

Streams		New
NAME	RECORDS FOLLOWED	
Management	2 records including Bonnie Real, Rita Baker	▼
Green Opportunities	3 records including Edge Emergency Generator, Lags Green, Leds Green	▼
Dailies	2 records including Petrus, Bonnie's Private Group	▼

- On the row that lists the stream you want to delete, click the ▼ menu icon, and select **Delete**.
- In the Delete dialog, click **Delete**.

Delete a Chatter Stream from Within the Stream

Once you navigate to a stream, a **Delete** action is available for deleting the stream. Deleting a Chatter stream doesn't delete the records or posts that it contains. It deletes only the stream, which frees up space for you to add more streams.

The Chatter home page lists your five most recently accessed streams. Click a stream name to open it. If the stream you want to edit is not listed, click the Streams heading to navigate to the streams home page. There you can locate your stream, and click its name to open it.

- Once you've navigated to a stream, click its **Delete** button.

EDITIONS

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

The screenshot shows the 'Management' stream page. At the top right, there are three buttons: 'Edit', 'Notifications', and 'Delete'. The 'Delete' button is highlighted with an orange rectangular box. Below the buttons is a search bar and a 'Latest Posts' dropdown. A post by Bonnie Real is visible, dated March 27, 2017, at 3:13 PM. The post content is: "I'm interested in the new #sales data from the Western Division. Does anyone else see a particularly interesting #trend?". Below the post are 'Like', 'Comment', and 'Share' buttons. At the bottom, there is a comment input field with the placeholder text "Write a comment..." and a small profile picture of Bonnie Real.

2. In the Delete dialog, click **Delete**.

Work with Posts

Share information and collaborate with other people inside and outside your organization.

 **Note:** Chatter feed posts, tracked changes, and comments don't count toward your org's data storage allowance.

[Posting Overview](#)

Use the Chatter publisher to post, comment, ask questions, and create polls.

[Post Visibility](#)

Learn where you can post, who can see your posts, and whose posts you can see.

[Anatomy of a Chatter Post](#)

Here's a quick look at all the information that surrounds a typical Chatter post in Lightning Experience.

[Characteristics of Chatter Counts](#)

There are a few ways to determine how many people are looking at a Chatter post. There's the view count, the Seen by count, and the counts you find in the Interaction Count Report. Although there's crossover in terms of what's being counted, the counts for a given post can be different for each type. Let's examine why.

[Mute a Post](#)

Mute posts to stop receiving notifications about them.

[Tips for Deleting Feed Posts and Comments](#)

Here are some useful things to know about deleting posts and comments in feeds.

[Draft Posts](#)

Save Chatter posts as drafts and access them later to edit, publish, or delete.

[Live Feeds](#)

When you're in a group in Lightning Experience, the Chatter feed is live. Live feeds offer posts and comments right as they're posted, without requiring a page refresh.

[Live Comments](#)

In Lightning Experience feeds, comments are live. Live comments appear when they're posted, without requiring a page refresh.

[Mention People and Groups in Chatter](#)

A great way to get someone's attention or to share a post with a group is to mention them.

[Link to a Record from a Post or Comment](#)

After a little administrative setup, you can link to a recently viewed record from a post or comment. In the Chatter publisher, enter a forward slash (/) and start typing the record name. You can link to any record type that's enabled for your org, such as work records, accounts, opportunities, and cases. Link to up to 25 records in each post or comment.

[Who Can See My Attached Files and Links?](#)

Share files and links with people by attaching them to posts or comments.

[Attach Files and Links to Posts](#)

Share files and links from Salesforce or from your computer by attaching them to posts or comments.

Polls

A poll contains a question and a list of possible replies. Poll your users and let them vote on their favorite response. People with access to the feed where the poll is posted cast their votes by selecting a reply.

Topics List

Use the topics list to see the topics that people are talking about in your organization. All topic names appear in this list, including topics that are used solely in private groups or on records.

Share a Chatter Post

Sharing lets you quickly copy a public post to your profile or a group. This feature is available in Salesforce Classic and Lightning Experience.

Posting Overview

Use the Chatter publisher to post, comment, ask questions, and create polls.

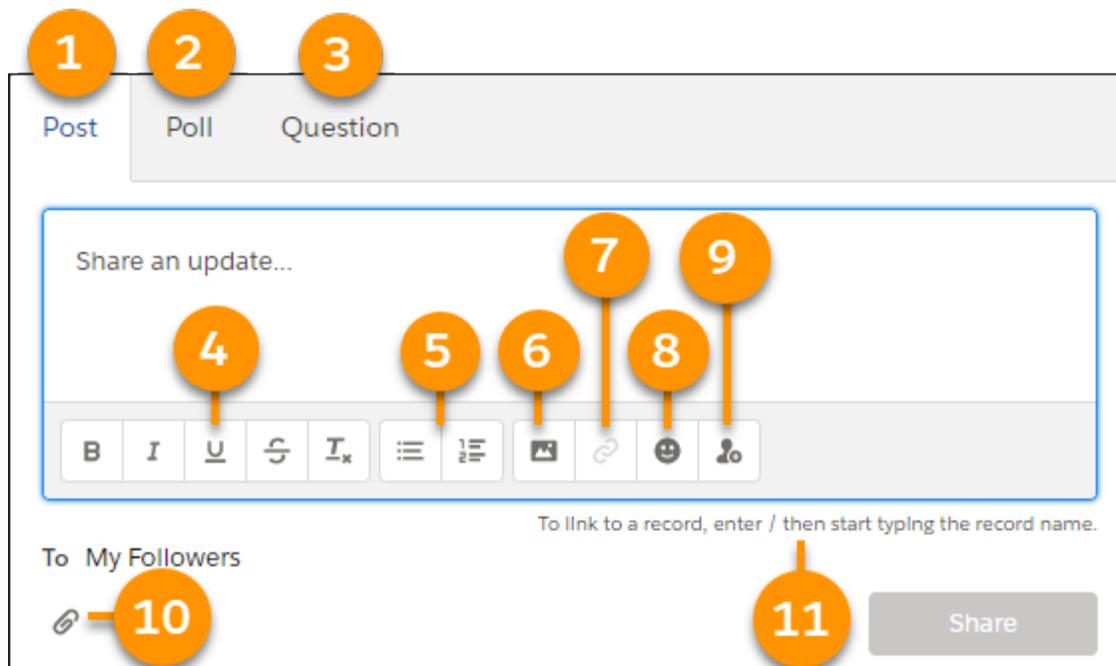
The publisher appears on your Home tab, Chatter tab, user profile page, and group and record detail pages. Use the publisher to write a post, comment on a post, attach a file or link to your post, add a poll, or ask a question. Posts and comments can be up to 10,000 characters long. Questions can be up to 255 characters, though question details can be much longer. Use the rich text editor to format your posts. Publisher actions include styling text and removing text styles, adding lists, adding inline images, hyperlinks, and emojis, @mentioning someone, and attaching a file.

-  **Note:** The Chatter Publisher in Salesforce Classic shares some features with Lightning Experience. But the publisher in Lightning Experience has more.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



1. Post tab
2. Poll tab
3. Question tab
4. Font styles, including remove styles action
5. List styles
6. Inline image
7. Inline Hyperlink

 **Note:** Hyperlinking inline images is not supported.

 **Tip:** Highlight link text before you click the hyperlink icon. If your hyperlink URL gets an error, check its syntax to ensure that:

- The URL starts with `https://`.
- The hostname and file name are correct.
- The URL doesn't point to a localhost domain.

8. Emoji selector
9. @Mention action
10. Add file action
11. Link-to-record prompt

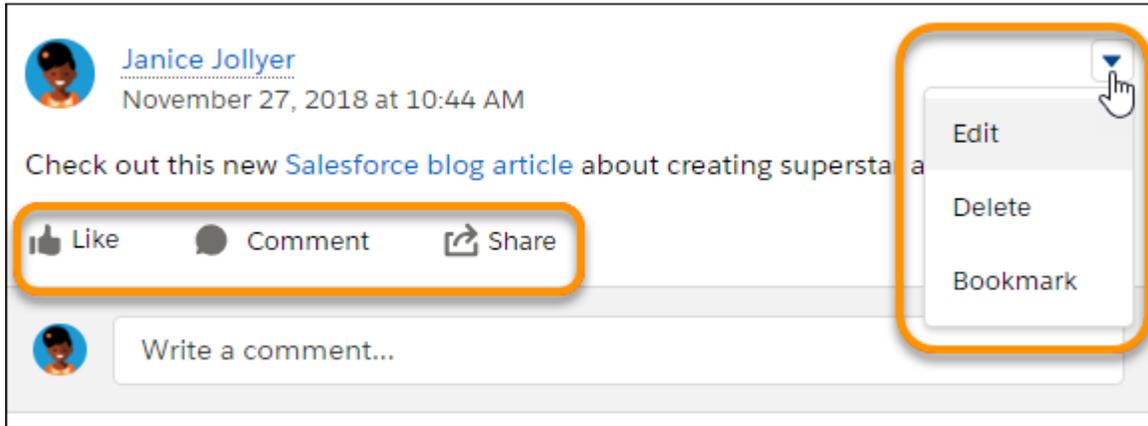
 **Note:** The link-to-record feature brings up records that you have recently viewed. If the record you want to link to isn't on the selection list, visit the record and try again.

 **Tip:** In Lightning Experience, you can use the keyboard to complete posts and comments. On Windows, enter content and press `Ctrl+Enter`. On macOS, press either `Control+Enter` or `Command+Enter`.

In questions, shortcut keys work with question details, but not on the question itself. So if you ask a question but don't include details, the shortcuts don't work. When you include details with the question, then shortcuts work.

By default, the publisher displays the Post, Poll, and Question actions. Your Salesforce administrator can change the order of the actions and add more actions. Therefore, the actions you see depend on how your administrator configured the publisher.

When you post to a feed, everyone with access to the feed can comment on, like, upvote (if enabled), or share the post. Other actions can appear on the actions menu.



In Lightning Experience, comments are live and don't require a page refresh to update.

- ✔ **Note:** Live comments is a new feature with lots of potential for enhancement and a few known issues.
 - When new comments are made on a feed post that you're engaged in, you receive notifications only in Lightning Experience. Notifications appear when you're actively typing comments or you've clicked in the comments box.
 - The number of participants supported for live comments depends on your org's subscription limits. If you're not getting live comments, then click in a comment field. If comments still aren't live, then it looks like your org has hit its limit! You can still get updates the old-fashioned way by refreshing the page.

Click **Edit** to modify your own posts and comments. If you're a group owner or manager, then you can also edit other people's posts on the group feed. Click **Delete** to remove your post from the feed. However, you can't delete other people's posts or posts about feed tracked changes.

- ✔ **Note:** If the Edit option isn't available on posts or comments, either your administrator disabled this feature for your organization or Accessibility Mode is enabled. Because Chatter doesn't support Accessibility Mode, post and comment editing become unavailable when it's on.

SEE ALSO:

[Post Visibility](#)

[Live Feeds](#)

[Live Comments](#)

Post Visibility

Learn where you can post, who can see your posts, and whose posts you can see.

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Anyone except [customers](#) can see your posts on your profile, and the people who follow you can see your posts in their Chatter feed. However, if you change a record, only the people who have permission to see the record can see the record update in a feed.

In Chatter, you see updates only from the people and records that you follow. Follow more records and people to see more updates in the Chatter feeds on your Home and Chatter tabs. In Salesforce Classic, click **People** on the Chatter tab to find a list of the people in your organization to follow or unfollow.

The posts that you add to a group are also visible on your profile. But who sees that post depends on the [group type](#). For example, when you post to a group that is:

- Public, anyone except customers can see the post on your profile.
- Private, only other group members can see the post on your profile.
- Private and allows customers, all members can see the post in the group. Customers who are members of the group can see your posts on the group page but not on your profile.
- Unlisted, only group members and users with Manage Unlisted Groups permission can see the post on your profile. Customers who are members of the group can see your posts on the group page but not on your profile.

This table describes where you can post and where your post appears.

I'm posting on	I can post to	Who gets my post directly?	Where does my post appear?	File Considerations
Home tab, Chatter tab, or my profile	My followers	<ul style="list-style-type: none"> • People following you see your post in the What I Follow feed. • People who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<ul style="list-style-type: none"> • Everyone who navigates to your profile can see your post on your profile. • Your post appears in feed search results. • Everyone can see your post in the All Company feed (Salesforce Classic).⁴ 	If you attach a file to the post, the file is available to all employees. The file also shows up in search results and file lists.
	A public group	<ul style="list-style-type: none"> • Members of this group see your post in the What I Follow feed. • Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<ul style="list-style-type: none"> • Everyone who navigates to the group can see your post on the group page. • Your post appears in feed search results. • Everyone can see your post in the All Company feed. 	If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.
	A private group	<ul style="list-style-type: none"> • Members of this group see your post in the What I Follow feed. • Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	Only members of the group see your post in the group feed, feed search results, and the All Company feed.	If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.
	An unlisted group	<ul style="list-style-type: none"> • Members of this group see your post in the What I Follow feed. • Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	Only group members and users with Manage Unlisted Groups permission see your post in the group feed, the All Company feed, and on your profile.	If you attach a file to the post, the file is viewable and searchable by anyone who has access to the group.
	A customer group	<ul style="list-style-type: none"> • Members of this group see your post 	Only members of the group see your post in	If you attach a file to the post, the file is available

I'm posting on	I can post to	Who gets my post directly?	Where does my post appear?	File Considerations
		<p>in the What I Follow feed.</p> <ul style="list-style-type: none"> Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>the group feed, feed search results, and the All Company feed. Members include employees and customers.</p>	<p>to anyone who has access to the group. The file also appears in search results and on file lists.</p>
Topic detail page	My followers	<ul style="list-style-type: none"> People who follow you see your post in the What I Follow feed. People who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<ul style="list-style-type: none"> Everyone can see your post on the topic detail page. Everyone who navigates to your profile can see your post on your profile. Your post appears in feed search results. Everyone can see your post in the All Company feed. 	<p>If you attach a file to the post, the file is available to all employees. The file also appears in search results and on file lists.</p>
	A public group	<ul style="list-style-type: none"> Members of this group see your post in the What I Follow feed. Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<ul style="list-style-type: none"> Everyone can see your post on the topic detail page. Everyone who navigates to the group can see your post on the group page. Your post appears in feed search results. Everyone can see your post in the All Company feed. 	<p>If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.</p>
	A private group	<ul style="list-style-type: none"> Members of this group see your post in the What I Follow feed. Group members who are mentioned in the 	<p>Only members of the group see your post on the topic detail page, in the group feed, feed search results, and the All Company feed.</p>	<p>If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.</p>

⁴ This footnote applies to all mentions of the All Company feed in this table: The Company Highlights feed in Lightning Experience shows the post, depending on its popularity ranking and engagement (such as comments, likes, and views).

I'm posting on	I can post to	Who gets my post directly?	Where does my post appear?	File Considerations
		post see the post in the What I Follow, To Me, and profile feeds.		
	A customer group	<ul style="list-style-type: none"> Members of this group see your post in the What I Follow feed. Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>Only members of the group see your post on the topic detail page, group feed, in feed search results, and in the All Company feed. Members include employees and customers.</p> <p>Although customers see your post, they don't see or have access to topics.</p>	If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.
An unlisted group	You can't use topics in unlisted groups. You can add a hashtag topic when writing a post or comment in an unlisted group. The topic will be formatted as a link after you post. However, a topic detail page isn't created, and the link doesn't work.	—	—	—
Another person's profile	That person's profile only	<ul style="list-style-type: none"> The person sees your post in their profile feed. People who follow both you and this person see your post in the person's profile feed and the What I Follow feed. People who are mentioned in the post see the post in their What I Follow, To Me, and profile feeds. 	<ul style="list-style-type: none"> Everyone who navigates that person's profile can see your post on your profile. Your post appears in feed search results. Everyone can see your post in the All Company feed. 	If you attach a file to the post, the file is available to all employees. The file also appears in search results and on file lists.
A public group	To the public group only	<ul style="list-style-type: none"> Members of this group see your post 	<ul style="list-style-type: none"> Everyone who navigates to the 	If you attach a file to the post, the file is available

I'm posting on	I can post to	Who gets my post directly?	Where does my post appear?	File Considerations
		<p>in the What I Follow feed.</p> <ul style="list-style-type: none"> Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>group can see your post on the group page.</p> <ul style="list-style-type: none"> Your post appears in feed search results. Everyone can see your post in the All Company feed. 	<p>to anyone who has access to the group. The file also appears in search results and on file lists.</p>
A private group	To the private group only	<ul style="list-style-type: none"> Members of this group see your post in the What I Follow feed. Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>Only members of the group see your post in the group feed, in feed search results, and in the All Company feed. If someone is both a member of the private group and one of your followers, they see your post on your profile page feed.</p>	<p>If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.</p>
An unlisted group	To the unlisted group only	<ul style="list-style-type: none"> Members of this group and users with Manage Unlisted Groups permission see your post in the What I Follow feed. Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>Only members of the group see your post in the group feed, feed search results, and the All Company feed.</p>	<p>If you attach a file to the post, the file is viewable and searchable by anyone who has access to the group.</p>
A customer group	To the customer group only	<ul style="list-style-type: none"> Members of this group see your post in the What I Follow feed. Group members who are mentioned in the post see the post in the What I Follow, To Me, and profile feeds. 	<p>Only members of the group see your post in the group feed, feed search results, and the All Company feed. Members include employees and customers.</p>	<p>If you attach a file to the post, the file is available to anyone who has access to the group. The file also appears in search results and on file lists.</p>
A record page	To the record only	<ul style="list-style-type: none"> Everyone who is following the record 	<p>Everyone with permission to access the record can</p>	<p>If you attach a file to the post, the file is associated</p>

I'm posting on	I can post to	Who gets my post directly?	Where does my post appear?	File Considerations
		<p>and who has permission to access the record sees your post in the What I Follow feed.</p> <ul style="list-style-type: none"> • People who are mentioned in the post and who have permission to access the record see the post. They see the post in the What I Follow, To Me, and profile feeds. 	<p>see your post. They see the post on the record detail page, in your profile, feed search results, and the All Company feed.</p>	<p>with the record. Everyone who has sharing rights to the record has access to the file.</p>

 **Note:** You can't create posts on archived groups. Comments on existing posts in an archived group follow the same visibility settings as before the group was archived.

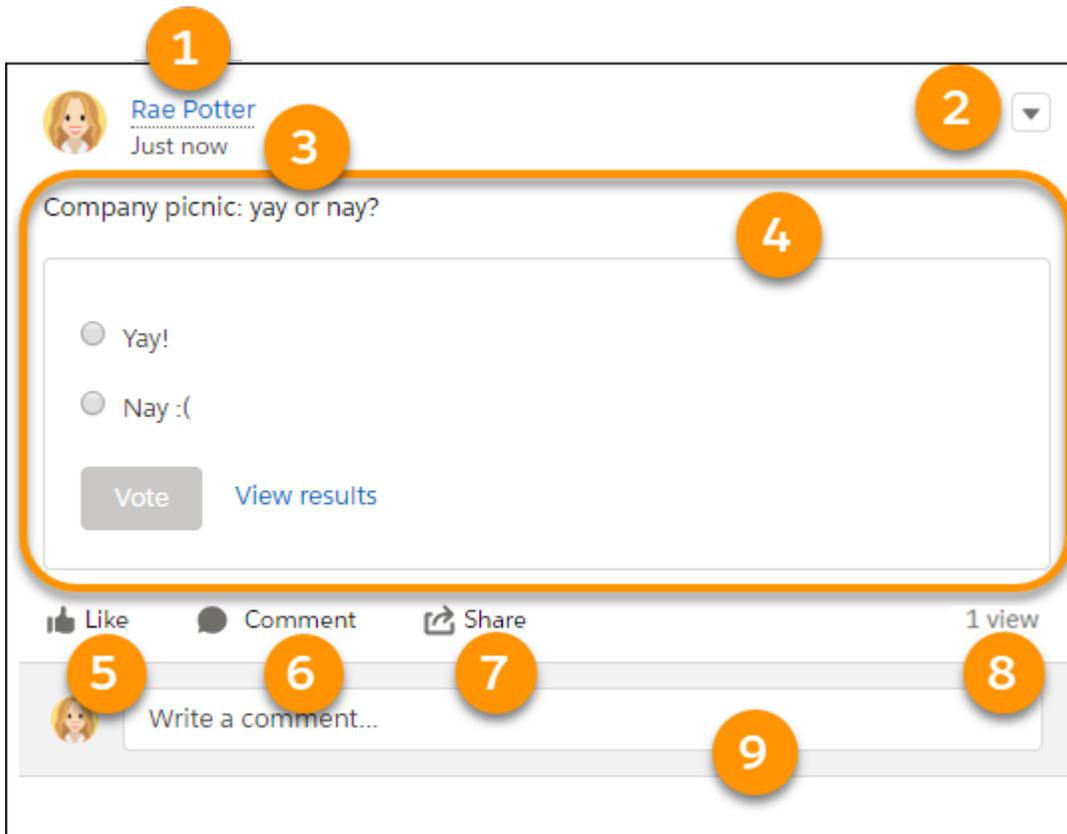
Anatomy of a Chatter Post

Here's a quick look at all the information that surrounds a typical Chatter post in Lightning Experience.

Available in: Lightning Experience

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

Rae Potter created and posted a poll.



1	<p>At the top of the post, the name of the person who posted appears. Click the name to navigate to that person’s profile. If you’re seeing a post in a combined feed, like Company Highlights or What I Follow, the top can also show where the post originates. For example, it can show the name of the group where the post appears. You can click the group name to navigate to that group.</p>
2	<p>The actions menu. The options that appear on the actions menu depend on a few things. Are you viewing the post’s detail view? Has your administrator added actions to the Chatter publisher? Standard items on this menu include Bookmark and Delete—provided you’re the person who posted or you have permission to delete users’ posts. The Mute option appears on a post’s actions menu in the What I Follow feed and in the post’s detail view.</p>
3	<p>The post’s date and timestamp. The date and timestamp shows when the item was posted. Click the date and timestamp to navigate to the post’s detail view.</p> <p>If the post is less than two days old, the date and timestamp is relative, such as “Just now.” Otherwise, the date and timestamp is absolute, such as “October 5, 2017 at 4:06 PM.”</p>
4	<p>The post. In this example, we see a poll question and its selection of answers.</p>
5	<p>The Like button. Click the Like button to show appreciation, agreement, affection, or some other positive response to the post. Some people like posts to show that saw the post.</p>
6	<p>The Comment button. Click the Comment button to shift your mouse focus to the Comment field. You can also click in the Comment field to start entering a comment on the post.</p>

7	The Share menu. Use the Share menu to share this post with your followers or a group that you choose. Share with anyone who has access to the post, using the Copy Link option on the Share menu.
8	<p>The view count. The view count shows how many times this post has been viewed. The count goes up whenever someone likes, comments on, or navigates to the detail view of the post.</p> <p>Posts in private and unlisted Chatter groups can use a seen-by count in lieu of the view count. Seen by shows the count of people who have seen a post. Click the count to see the names of the people who have seen the post. What is considered as being seen? Liking, commenting, editing, and viewing in detail. An item is also considered seen when a user has it in view on the screen or when they scroll past it.</p> <p>For both seen by and view, the actions you take in Salesforce Classic are tracked and counted. But only Lightning Experience shows the seen-by count and list.</p> <p> Note: Users with Modify All Data or View All Data permission see a seen-by count in all feeds, and not just private and unlisted feeds.</p> <p>One difference between the seen-by and view counts is that one person can be counted many times with view count. With seen by, a person is counted only one time, no matter how many times they perform a counted action.</p>
9	The comment field. Comment on a post to build the discussion thread.

SEE ALSO:

[Seen-By Information in Private and Unlisted Groups](#)
[Characteristics of Chatter Counts](#)

Characteristics of Chatter Counts

There are a few ways to determine how many people are looking at a Chatter post. There's the view count, the Seen by count, and the counts you find in the Interaction Count Report. Although there's crossover in terms of what's being counted, the counts for a given post can be different for each type. Let's examine why.

The view count is available in all Chatter feeds. View count increases whenever someone likes, comments on, shares, or navigates to the detail view of the post. Views are counted each time one of these actions is taken. That is, if you visit a feed item detail view in the morning, then again in the afternoon, that's counted as two views. When the person who posted visits that feed item later in the day, it's counted as a view.

The Seen by count is available in private and unlisted Chatter groups. The count increases whenever someone likes, comments on, edits, shares, or navigates to the detail view of a post. An item is also considered seen when a user has it in view on their screen or when they scroll past it. A seen-by action is counted only once for a given person. The person who posted the feed item isn't included in the count. If you visit a feed item detail in the morning, then again in the afternoon, that's counted as one seen-by event. A feed item's seen-by count can differ from its view count. With seen-by, more actions are counted and each person's activity is counted only once.

In a Chatter feed, you typically get one count or the other. View count and seen-by count almost never appear together in the same feed. There are rare occasions when seen-by information isn't available and view count is displayed instead. If you turn seen-by off for a selected profile, the users with that profile see view count.

The Interaction Count Report shows the top 100 feed item views over the last week in your org or Experience Cloud site. The count you get from an Interaction Count Report increases when someone likes, comments on, shares, or navigates to the feed item's detail view. Interactions are counted each time one of these actions is taken. For example, when a user comments on a post three times, it's counted as three views. In this way, view count and the interaction count are alike.

EDITIONS

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

 **Note:** Actions performed through APIs are counted in the same way as actions performed through the UI. However, actions can have different names in APIs. For example, Seen by is called “read by” and views are called “interactions” in Connect REST API and Connect in Apex.

So, why don't the counts in the Interaction Count Report match the view count? There are three reasons.

- Interaction counts aggregate only one week of data at a time. View counts aggregate continuously over time.
- Interaction counts include only the top 100 feed items that had the most views within a week.
- Multiple views by the same user within a brief period are each counted as interactions. Multiple views within the same period are counted only once for view counts.

Here's another way to look at these differences.

Questions	Interaction Count Report	View Count	Seen By Count
Can one viewer be counted more than once?			
Are likes, comments, shares, and visits to the detail view counted?			
Does scrolling past the feed item or having it in view count?			
When they take an included action, like commenting or sharing, is the feed item author included in the count?			
Are multiple views by the same person within a brief period counted as multiple views or interactions?			
Do actions performed through APIs count in the same way as actions performed through the UI?			

SEE ALSO:

[Anatomy of a Chatter Post](#)

Mute a Post

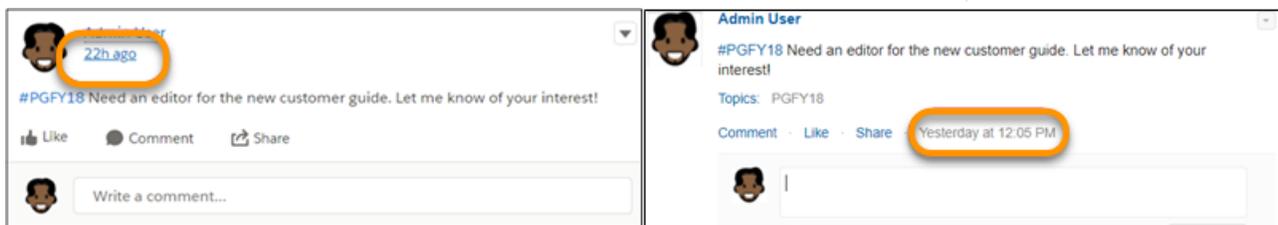
Mute posts to stop receiving notifications about them.

You can mute a feed post from the full feed on the Home and Chatter tabs. In a group, profile, or record feed, you can mute a post from its detail view. To navigate to a post's detail view, click its date-and-time stamp.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



 **Note:** The Home tab is a feature in Salesforce Classic only.

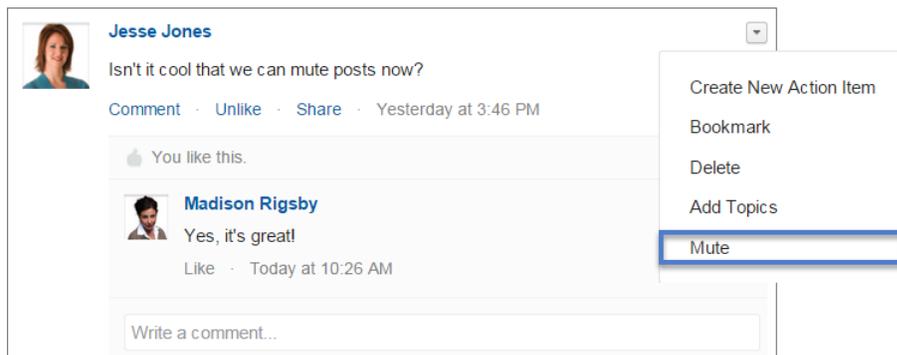
If your admin enabled email replies, you can also mute posts by replying to notification emails with the single word *mute*.

To mute a post in a feed, select **Mute** from the post's actions menu.

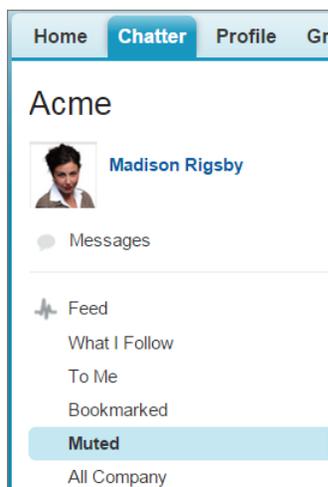
To mute a post from its detail view:

1. Go to detail view in the feed by clicking the post's date-and-time stamp, or, in an email notification, by clicking the **View/Comment** button.
2. From the post's actions menu, select **Mute**.
 - In Salesforce Classic:
 - The post no longer appears in your feed on the Home and Chatter tabs.
 - You can use the Muted filter to view your muted posts.
 - In Lightning Experience and in Experience Builder sites that are based on the Customer Service (Napili) template:
 - The post stays in place. If you're in the What I Follow Feed, however, the muted item disappears from the feed—though it continues to appear in its source feed. If you plan to refer to that item again, copy its detail-view URL. Save the URL some place safe to ensure you can get back to the item later.
 - In all of these environments:
 - You no longer get notifications for updates to that post.
 - If someone mentions you on a muted post, the post is automatically unmuted. It reappears in your feed and if you have email notifications enabled, you get a notification about the update.
 - If the post was originally posted to a group, profile, or record feed, it still appears on that feed. For example, someone posts to a group that you're a member of. The post appears on the group feed and your news feed on the Home and Chatter tab. You can mute the post in your news feed, but the post remains visible in the group feed.

 **Example:** Here's how you mute a post from a post's actions menu.



In Salesforce Classic, to view all posts you muted, select the Muted filter.



To see a muted post in Lightning Experience and in sites (Napili), go to the post's original feed.

Tips for Deleting Feed Posts and Comments

Here are some useful things to know about deleting posts and comments in feeds.

- You can delete any post that you create.
- You can delete any comment that you create.
- You can delete any comment on any post that you create, no matter who wrote the comment.
- On a record that you own, you can delete any post or comment from the feed.
- In groups, group owners and managers can delete almost any post or comment.
-  **Note:** When a post appears in a feed because of a mention, it can't be deleted. The feed item must be deleted from the feed where the mention was entered.
- Users with the Modify All Data permission, can delete any post or comment.
- In Experience Cloud sites, moderators can delete any post or comment.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Draft Posts

Save Chatter posts as drafts and access them later to edit, publish, or delete.

The Draft Posts feature automatically saves your Chatter posts as you create them, including content like files, links, images, mentions, hashtags, and other rich text.

 **Note:** The Drafts Posts feature is available only for Chatter Posts, and not for Questions or Polls.

Draft posts save automatically as you type a post. Once you've added text or a rich text item to your post, **Saving...** appears next to **Share** and then changes to **Saved**. When your draft is saved, you can access it from **My Drafts**.

To access a draft post from **My Drafts**:

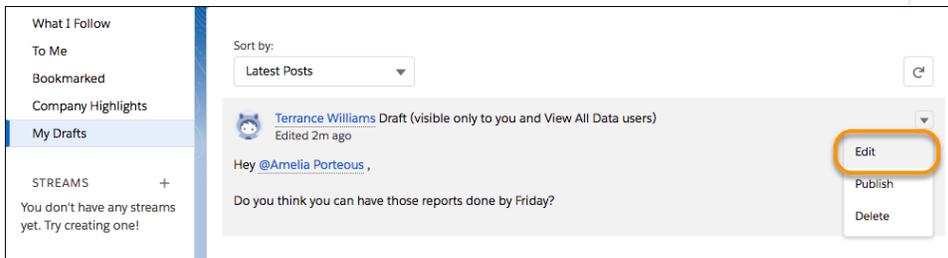
1. Go to the Chatter tab and select **My Drafts**.
2. From the post's dropdown menu, you can select **Edit**, **Publish**, or **Delete**.

When a draft is saved,

- Attached files remain private until the post is published.
- If the draft contains a hashtag, the corresponding topic is not created until the post is published.
- It can be found in **My Drafts**, but doesn't appear in search.

 **Note:** Post visibility settings are saved only for the first draft. After a draft post has saved, you can edit the post in My Drafts, but you can't change the post's visibility.

 **Example:** Here's how you edit a post from **My Drafts**:



Live Feeds

When you're in a group in Lightning Experience, the Chatter feed is live. Live feeds offer posts and comments right as they're posted, without requiring a page refresh.

In a live feed, new posts trigger a message that appears briefly at the top of the feed (1).

EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer** editions.

USER PERMISSIONS

To see drafts:

- Allow draft posts

To save and publish drafts:

- Edit my Own Posts

AND

Allow users to edit posts and comments

EDITIONS

Available in: Lightning Experience

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

The screenshot shows a Salesforce Chatter group page for 'Balungalotl Packaging'. The group is private and owned by the user. The 'CHATTER' tab is selected, showing a post creation interface with options for Post, Poll, Question, and Announcement. A 'Share' button is visible. Below the post creation area, there is a notification for '2 New Posts' (highlighted with an orange box) and a yellow circle with the number '1'. The latest post is from 'Balungalotl Packaging (Private) – Lisa Theiring', posted 'Just Now'. The post content reads: 'We've started the group for our packaging exploration. If you have ideas, questions, announcements, or want to administer a poll about our efforts, post 'em here!'. Below the post are 'Like' and 'Comment' buttons. At the bottom, there is a comment input field with the placeholder text 'Write a comment...'.

Live comments appear in all feeds in Lightning Experience and not just group feeds. While people are entering comments, an animation shows activity on the post (2). And when a live comment is first posted, it briefly flashes yellow.



There are a few differences between live and non-live, or served, feeds:

- Live feeds show content that's posted by users—that is, by human beings. They don't show system-generated posts, like feed tracked changes (FTCs) and custom event posts. To see these posts, refresh the feed.
- Live feeds show content that is posted directly to the group feed. They don't show posts that were mentioned into the group nor edits made to existing posts. To see these posts, refresh the feed.
- A live feed is as good as its network connection. It's possible that some posts aren't served live nor appear in the exact order that they were posted. Consider refreshing the feed from time-to-time.

If you go idle for a while or navigate away from a live feed, refresh the page to make it live.

For developers, live updates are not transactional. The server and the browser are a distributed system, and there is no transaction coordination between them. The served feed is a snapshot of the state of the feed in time. The live feed is a series of incremental updates to the current page, which are best efforts. They're not intended to be equivalent to the snapshot that the next served page delivers. Live feeds are optimized for human consumption. We don't recommend writing code that consumes them that depends on the delivery of specific entities or the format of the pushed (live) data.

-  **Note:** The number of participants that are supported in a live feed depends on your org's subscription limits. If you're not getting a live group feed or live comments, refresh the page or click in a comments field. If the feed still isn't live, it's likely that your org has hit its limit. You can still get updates the old-fashioned way by refreshing the page.

Live Comments

In Lightning Experience feeds, comments are live. Live comments appear when they're posted, without requiring a page refresh.

To see live comments in a feed, you must be subscribed. Subscription is easy. Here are three ways to do it:

- Click in the **Comment** field.
- Post something
- Click **more comments**

If you go idle for a while or navigate away from a feed, click in a comment field to resubscribe.

When you're subscribed to live comments in a feed, a typing indicator shows you when people are actively entering comments.

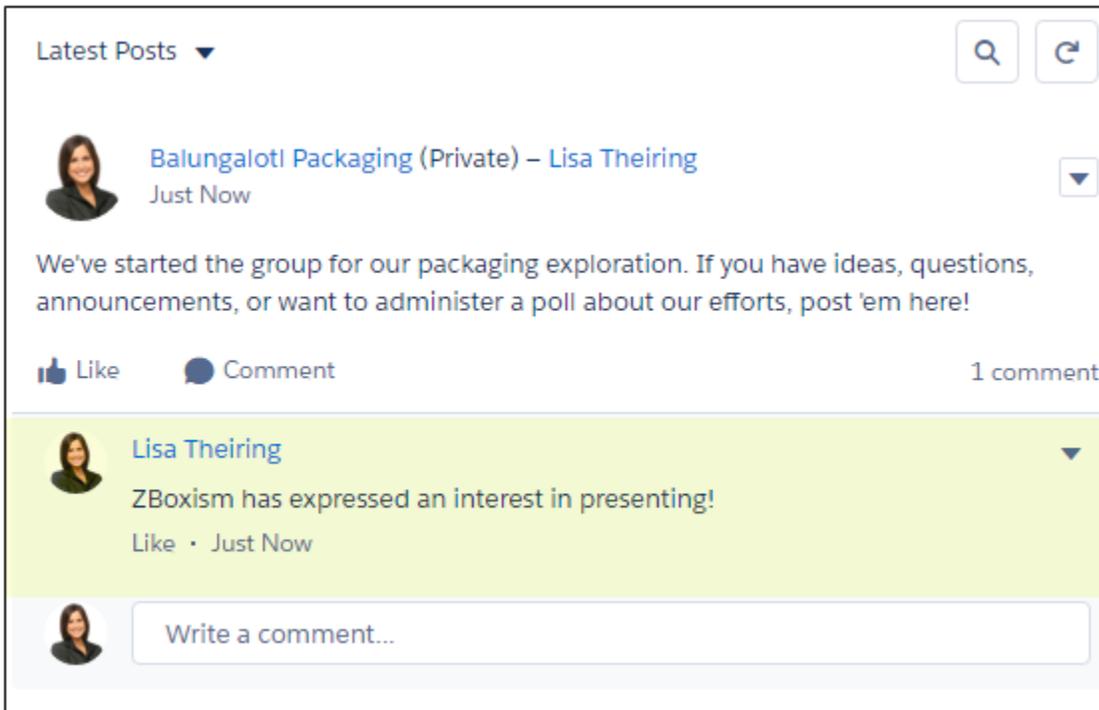
EDITIONS

Available in: Lightning Experience

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



When the comment is posted, it briefly flashes yellow.



- When new comments are published on a feed post that you're engaged in, you receive notifications only in Lightning Experience. Notifications appear when you're actively typing comments or you've clicked in the comments box.
- The number of participants that are supported for live comments depends on your org's subscription limits. If you're not getting live comments, click in a comment field. If comments still aren't live, it's likely that your org has hit its limit. You can still get updates the old-fashioned way, by refreshing the page.

Mention People and Groups in Chatter

A great way to get someone's attention or to share a post with a group is to mention them.

 **Note:** To get the best performance, access checks for mentions occur after you select a name. If the check fails, a message tells you that the mentioned user can't see the update: [Name] doesn't have access and won't see this update. The mention becomes a link. When you have access to the mentioned person, the link is to that person's profile. When you don't have access—for example, when the user is an external user—the link is to the person's user record detail page. In either case, the mention doesn't trigger a notification for the mentioned person.

[@Mention People and Groups in Posts and Comments](#)

@Mention a person or a group to call their attention to something you want them to see.

[Visibility of User and Group @Mentions](#)

When you @mention people or groups in an update, anyone who has access to the update can see the post and all comments.

@Mention People and Groups in Posts and Comments

@Mention a person or a group to call their attention to something you want them to see.

1. When you write a post, enter @ followed by the first few letters of the person or group name.
2. Select the person or group from the list of matches.

The list includes all matches for

- People, typically users you interact with the most
- Chatter Public groups
- Chatter Private groups you're a member of

You can add up to 25 mentions to a single post or comment. You can't mention archived groups, unlisted groups, customer groups, and private groups that you're not a member of.

3. To post your update, click **Share**.

For the people that you mention,

- The person's name becomes a link to their profile.
- Your update appears on the mentioned person's profile, To Me, and What I Follow feeds.
- In Lightning Experience, an in-app notification is added to the mentioned person's list of in-app notifications.
- For people who choose to receive emails when mentioned, Chatter sends an email notification.

 **Note:** There's an exception: if you @mention yourself, you don't receive a notification.

- For the groups that you mention,
 - The group name becomes a link to the group page.
 - Your update appears on the group feed and each group member's What I Follow feed.
 - Chatter sends email and in-app notifications to the group members who enabled the **Email on every post** preference for the group.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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 **Note:** On mobile devices, Chatter sends a push notification to group members who enabled **Someone @mentions your group** under their push notification settings.

- If the mention is on a record feed, the record appears in the group records list.

 **Example:** Your coworker Madison posts that she's looking for information about an Acme product feature. You reply to Madison's post with the comment: "Talk to @Bob Smith, the Acme account manager. @Acme Products, do you have any additional information for Madison about this feature?" Both Bob Smith (if he chose to receive emails when mentioned) and members of the Acme Products group get email and in-app notifications about your post. Mobile users who enabled **Someone @mentions your group** get a push notification. Madison can click **@Bob Smith** in the update to view Bob's profile, or click @Acme Products to see their group page. In addition to notifications, Bob sees the mention in his profile, To Me, and What I Follow feeds.

Chatter enforces security and sharing rules in Salesforce. Let's say you post to a record or a private or unlisted group. In that post, you @mention someone who doesn't have access to that record or isn't a member of the group. In this case, the @mention appears as a gray link. The mentioned person can't see your post and doesn't get notified about the post. But the mention does become a link to the mentioned person's profile page.

For example, Madison creates a private group for her project team and forgets to add her coworker Sandy Dunn to the group. When Madison posts an update to this group and @mentions Sandy Dunn, Sandy isn't notified about the update. Sandy also can't see the update because she's not a member of the private group. If Madison later adds Sandy to the group, Chatter doesn't notify Sandy about the previous mentions.

SEE ALSO:

[Share a Chatter Post](#)

[Share a Link to a Chatter Post](#)

[View a Single Chatter Post](#)

[Visibility of User and Group @Mentions](#)

Visibility of User and Group @Mentions

When you @mention people or groups in an update, anyone who has access to the update can see the post and all comments.

Available in: Salesforce Classic and Lightning Experience

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

This table describes where you can find posts and comments that mention people, public groups, and private groups. You can't mention unlisted groups nor private groups with customers.

If the post was made on	And mentions	Then these people can see the post and comments
A person's profile	Other people	Anyone with access to the person's profile.
	Public group	Anyone with access to the person's profile.
	Private group	Anyone with access to the person's profile, even if they're not a member of the private group.
Public group A	Other people	Anyone with access to public group A.
	Public group B	Anyone with access to public group A.

If the post was made on	And mentions	Then these people can see the post and comments
Private group A	Private group	Anyone with access to public group A, even if they're not a member of the private group.
	Other people	Members of private group A.
	Public group	Members of private group A.
Unlisted group A	Private group B	People who are members of both private group A and private group B see this mention in both group feeds. People who are members of private group B but not members of A don't see the mention or receive any notification for it.
	Other people	Members of unlisted group A and users with the "Manage Unlisted Groups" permission.
	Public group	Members of unlisted group A and users with the "Manage Unlisted Groups" permission.
Record detail page	Private group B	People who are members of both private group B and unlisted group A, or people who have the "Modify Unlisted Groups" permission.
	Other people	Everyone who is following you or this record and has access to the record sees your post in their What I Follow feed.
	Public group	People with sharing access to the record.
	Private group	People with sharing access to the record, even if they're not a member of the private group.

The visibility of posts and comments depends on sharing access to the post. Anyone with access to the original post also has access to all subsequent comments on the post.

 **Note:** To get the best performance, access checks for mentions occur after you select a name. If the check fails, a message tells you that the mentioned user can't see the update: *[Name]* doesn't have access and won't see this update. The mention becomes a link. When you have access to the mentioned person, the link is to that person's profile. When you don't have access—for example, when the user is an external user—the link is to the person's user record detail page. In either case, the mention doesn't trigger a notification for the mentioned person.

Link to a Record from a Post or Comment

After a little administrative setup, you can link to a recently viewed record from a post or comment. In the Chatter publisher, enter a forward slash (/) and start typing the record name. You can link to any record type that's enabled for your org, such as work records, accounts, opportunities, and cases. Link to up to 25 records in each post or comment.

 **Note:** Before you can link to records from a post or comment, your Administrator must contact Salesforce Support. Ask Salesforce to enable and set up the Quill editor for composing Rich Text content in Chatter.

You can link to records from a post, comment, and a question detail, but not the question itself. You can link to up to 25 records in a post, comment, or question detail.

EDITIONS

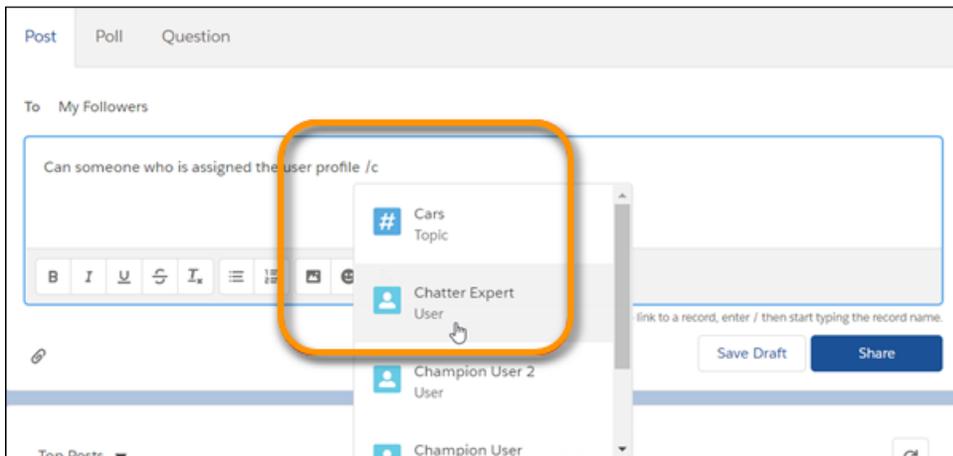
Available in: Lightning Experience

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

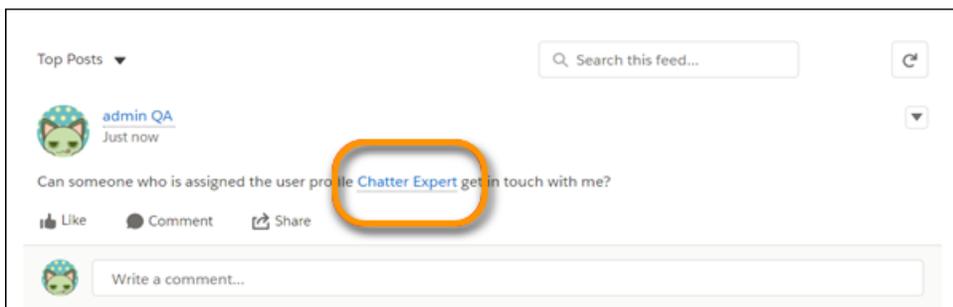


Note: In a report, linking to records isn't available on the feed that opens when you click the Collaborate button .

1. When you want to link to a record, enter a forward slash (/).
2. Start entering the record name.



3. Select a record from the list.
Records on the list are returned as the result of a search, and search returns only the records that you've looked at recently. So, if you've never viewed or interacted with a particular record, it doesn't appear on the list.
4. Finish writing your post or comment, and click **Share**.
The people who can access the record see the record name as a link.



The people who can't access the record see a Record Not Available message.



Note: Salesforce supports hyperlinks and entity links, but only hyperlinks are searchable. An entity link is a user at-mention or a record slash-mention. An easy way to tell if a link is a hyperlink or entity link is to hover over the link in a post. If a hover card pops up with details about the user or record, then it's an entity link. If there's no hover card but instead a tooltip with the link url, then it's a hyperlink.

Who Can See My Attached Files and Links?

Share files and links with people by attaching them to posts or comments.

Available in: both Salesforce Classic and Lightning Experience

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

Attach links and files to posts and comments from your device, Salesforce Files, Files Connect external sources, and Salesforce CRM Content libraries. All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs and image files. You can upload and download audio and video files, but you can't parse or preview them.

This table describes who can see a file that you attached and where it appears:



Note: When you enable Chatter for your org, make sure you've also enabled Chatter for your users. This way, they can access all Salesforce files in your org, including asset files.

If You Attach a File:	Who Can See It?	Where Does it Appear?
On a Chatter feed	All Chatter users in your company	<ul style="list-style-type: none"> • In your and your followers' Chatter feeds, and profile • On the Files list and Salesforce CRM Content of all Chatter users in your company
On your Chatter profile or on someone else's Chatter profile	All Chatter users in your company	<ul style="list-style-type: none"> • In your feed, their feed, your followers' feeds, and their followers' feeds and profiles • In the Files Owned list on your profile • On the Files list and Salesforce CRM Content of all Chatter users in your company
On a public group	All Chatter users in your company	<ul style="list-style-type: none"> • In your feed, your followers' feeds, and the group members' feeds • In your feed on your profile • In the feed on the group • In the Group Files list on the group • On the Files page and Salesforce CRM Content of all Chatter users in your company.
On a private group that you're a member of	Members of the group and users with "Modify All Data" and "View All Data" permissions	<ul style="list-style-type: none"> • In your feed and the group members' feeds • In your feed on your profile • In the feed on the group • In the Group Files list on the group • On your Files lists, group members' Files lists, and Salesforce CRM Content

If You Attach a File:	Who Can See It?	Where Does it Appear?
On an unlisted group that you're a member of	Members of the group and users with the "Manage Unlisted Groups" permission	<ul style="list-style-type: none"> • In your feed and the group members' feeds • In your feed on your profile • In the feed on the group • In the Group Files list on the group • On your Files lists, group members' Files lists, and Salesforce CRM Content
On a record	Anyone with sharing rights to the record	<ul style="list-style-type: none"> • Record detail page • Your profile page • Feed search results • All Company or Company Highlights feed

SEE ALSO:

[Post Visibility](#)

Attach Files and Links to Posts

Share files and links from Salesforce or from your computer by attaching them to posts or comments.

[Attach a File to a Post or Comment](#)

You can attach all file types to a post or comment. For example, you can attach Microsoft® PowerPoint presentations, Excel spreadsheets, Adobe® PDF files, image files, audio files, and video files.

[Search for Files to Attach to a Chatter Feed](#)

From the file selector, you can see a list of Salesforce files that you own and have access to.

[Perform Actions on a File in a Chatter Feed](#)

You can perform actions on files in feeds. In Lightning Experience, actions are supported for posts but not for comments.

[Download and Preview a File in a Chatter Feed](#)

Not only can you download and save files posted to Chatter feeds, you can also preview files in your browser without downloading them.

[Delete Files and Links from Feeds](#)

Only a file owner can delete files. Users with the "Modify All Data" permission can delete all comments, posts, files, and links.

[Attach a Link to a File or Other Content to a Post](#)

In Salesforce Classic, share links with people by attaching them to a post.

[Sites That Generate a Preview in Posts](#)

Salesforce provides rich media support for over 400 URLs. When you share a supported link in a post, it's converted into embedded videos, images, and other types of previews.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

[File Limits in Chatter](#)

Here's a breakdown of the limits for files that are attached to a Chatter post or comment.

Attach a File to a Post or Comment

You can attach all file types to a post or comment. For example, you can attach Microsoft® PowerPoint presentations, Excel spreadsheets, Adobe® PDF files, image files, audio files, and video files.

The maximum file size that you can attach is 2 GB.

When you attach a file, consider these things:

- Only files posted in a private group stay private within that group. Otherwise, when a file is posted to a feed, everyone in your company can see it, even if the file started out as private.
- Attaching a file from a group or library creates a reference to the file. If you update a file in Salesforce CRM Content, the updates are also reflected in the attached file.
- In Lightning Experience, you can attach up to 10 files to a post and one file to a comment.
- When you comment on an update resulting from feed tracking on a file, the **Attach File** option isn't available.
- You can post a file from an external data source. From the file selector, choose an external source and navigate through the folders to the file you want to post. A new file reference or copy is created in Salesforce for the corresponding external file. If a file reference exists for the file you select, it is reused.

1. **For Salesforce Classic:** To attach a file to a post, click **File** at the top of your feed. To attach a file to a comment, click **Attach File** below the comment. **For Lightning Experience:** To attach a file to a post or comment, click  the Attach icon.
2. Do one of the following:
 - To attach a file that has already been uploaded to Salesforce or that exists in a Files Connect external data source, click **Select a file from Salesforce**.
 - To attach new files from your computer, click **Upload a file from your computer**.

3. Browse for the file you want to attach.

Some file types don't appear on the Select a File to Attach list. These types include Links, Google docs, documents from the Documents tab, and attachments from the Notes and Attachments related list. For more information about finding files to attach, see [Search for Files to Attach to a Chatter Feed](#).

4. Add a post or comment about the file.

If you don't enter any text, a generic update is posted with your attachment.

5. Below the text box, select **My Followers** to publish the post on your profile. To post to a group, select **A Group**. Type part of the group's name in the Search Groups field, and select the group from the dropdown list. You can select only a group where you're a member.
6. Click **Share**.

SEE ALSO:

[Upload Files](#)

[Upload a New Version of a File](#)

[Access and Share Files Connect External Files](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Search for Files to Attach to a Chatter Feed

From the file selector, you can see a list of Salesforce files that you own and have access to.

In Salesforce Classic, click **File** above the feed, and then select a file from Salesforce. In Lightning Experience, click the paperclip icon below the post to open the Select File window.

From the file selector, you can see and search within a selection of files by clicking a filter on the sidebar.

- The files that are listed come from libraries that you're a member of where you have the permission `Post Content to Chatter Feeds` or `Manage Library` selected in your library permission definition.
1. Optionally, on the **Files** tab click a filter on the sidebar to restrict your search to a specific set of files.
 2. Enter your search terms in the search box. You can search by file name, description, owner, type, or content.
 3. To see a filtered list of all relevant files based on your search terms, click **Search**.

The Select a File to Attach list doesn't include:

- Documents from the Documents tab.
- Attachments from the Notes and Attachments related list.
- Links attached to posts in Chatter
- Files from your personal library

SEE ALSO:

[Search for Files](#)

Perform Actions on a File in a Chatter Feed

You can perform actions on files in feeds. In Lightning Experience, actions are supported for posts but not for comments.

You can perform these actions on files in feeds. In Lightning Experience, these actions are supported for posts but not for comments.

- Preview—Click the file thumbnail or click **More Actions** > **Preview** next to the file.
- Download—Click **More Actions** >  **Download** next to the file.
- Upload new version—Click **More Actions** > **Upload New Version** next to the file.
- View file detail page—Click the file name or **More Actions** > **View File Details** next to the file.
- Follow—To receive updates about the file in the Chatter feed, click  **Follow** next to a file. To stop receiving updates about the file, click .
- Share—Click **More Actions** > **File Sharing Settings** next to the file to share the file with people, groups, or via link.

To learn who can perform which actions on a file, see [Who Can See My File?](#)

SEE ALSO:

[Preview Files and Edit File Details](#)

[Upload a New Version of a File](#)

[View Where a File Is Shared](#)

Download and Preview a File in a Chatter Feed

Not only can you download and save files posted to Chatter feeds, you can also preview files in your browser without downloading them.

There are several places in Chatter where you can download and preview files:

- On the **Files** page—Click  >  **Download** or click the preview () icon next to the file.
- On any Chatter feed—Click **More Actions** >  **Download** next to the file, or to preview the file, click the file thumbnail or click **More Actions** >  **Preview**.
- On the Files Owned by list on a profile—Click  >  **Download** or click the preview () icon next to the file.
- On the Files Shared with list on a group—Click  >  **Download** or click the preview () icon next to the file.
- In the Notes and Attachments related list on a record, click **Download** next to the feed attachment. To preview the file, click **Preview** next to the feed attachment.

Previewing a file opens it in your browser with the enhanced document viewer. The enhanced document viewer provides the following capabilities for viewing documents:

- You can use the next page () , previous page () , first page () , and last page () icons on the document toolbar. And you can navigate through a document page-by-page by right-clicking and choosing **Next Page** and **Previous Page**.
- You can use the scroll bar to move continuously through a document without needing to click the **Next Page** and **Previous Page** icons. Continuous scrolling is not available for PowerPoint files.
- You can jump directly to a page by entering the page number in the page field and pressing Enter.
- From the right-click menu, you can choose **Fit Width** to expand the width of the document, or **Fit Full Page** to preview the whole page of the document. The fit width icon () and fit full page icon () are also available on the toolbar.
- From the right-click menu, you can choose **Full Screen** to preview the document in full screen mode or **Exit** to exit full screen mode. The full screen icon () and exit icon () are also available on the toolbar.
- From the right-click menu, you can **Zoom In** or **Zoom Out**. The zoom-in icon () and zoom-out icon () are also available on the toolbar.
- You can use the keyboard arrow keys to navigate page-by-page through a document. Click the document viewer and use the keys as follows:
 - Right-arrow key: moves a PowerPoint document forward one slide and moves a PDF, Word, or Excel document forward one page.
 - Left-arrow key: moves a PowerPoint document backward one slide and moves a PDF, Word, or Excel document backward one page.
 - Up-arrow key: moves a PowerPoint document forward one slide and scrolls a PDF, Word, or Excel document up the page.
 - Down-arrow key: moves a PowerPoint document backward one slide and scrolls a PDF, Word, or Excel document down the page.
- You can't preview files larger than 25 MB, unknown file types, password-protected files, and copy-protected PDFs. For files that you can't preview, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce admin to request to regenerate the preview.
- In Internet Explorer 11, the **Preview** option redirects to the file detail page.

SEE ALSO:

[Who Can See My Attached Files and Links?](#)

[Delete Files and Links from Feeds](#)

Delete Files and Links from Feeds

Only a file owner can delete files. Users with the “Modify All Data” permission can delete all comments, posts, files, and links.

- To delete a link from a Chatter feed, simply delete its post.
- To delete a file from a Chatter feed on a record:

There are two ways to remove a file on a Chatter feed on a record:

- Delete its post. This action not only deletes the post, but also removes the file from the feed and from the Notes and Attachments related list. The file remains in its original location. If the file isn't posted anywhere else, it goes back to being private, but can be shared again later.
- Click **Del** next to the feed attachment on the Notes and Attachments related list. This action removes the file from all Chatter feeds where it's been shared. It also deletes the file from the Notes and Attachments related list. You can restore the file from the Recycle Bin. If the file was attached from your computer, a Chatter feed, group, or a Salesforce CRM Content library, deleting it from the Notes and Attachments related list removes it from the post, but not from its original location.

- To delete a file from a file detail page:

Click **Delete** on a file's detail page to delete the file and remove it from all locations where it's been shared. If the file was shared via link, anyone with the link no longer has access to the file once it's deleted. You can restore the file and all the shares that were associated with it by removing it from the Recycle Bin.

- To delete a file from a content detail page:

From the content details page, click **Edit > Delete Content** to delete the file. Deleting a Chatter file from the content details page deletes the file from Salesforce CRM Content and from Chatter.

SEE ALSO:

[Post Visibility](#)

Attach a Link to a File or Other Content to a Post

In Salesforce Classic, share links with people by attaching them to a post.

Available in: Salesforce Classic

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

If you share a URL with rich media support, your post shows a preview of the linked content. For information about currently supported URLs, see [Sites That Generate a Preview in Posts](#).

1. Above your feed, click **Link**.
2. Enter the URL to share.
3. Optionally, enter a `Link Name`.
If you leave the Link Name field blank, the preview shows the title or name from the site URL.
4. Optionally, enter a post to include with the link.
If you don't enter a post, a generic update is posted with your link.
5. To post to your profile, below the text box, select **My Followers**. To post to a group, select **A Group**. In the Search Groups field, enter part of the group's name and select the group from the dropdown list. You can select only a group where you're a member.

If you're posting on someone else's profile or on a record, the **My Followers** and **A Group** options aren't available.

6. Click **Share**.

SEE ALSO:

[Sites That Generate a Preview in Posts](#)

Sites That Generate a Preview in Posts

Salesforce provides rich media support for over 400 URLs. When you share a supported link in a post, it's converted into embedded videos, images, and other types of previews.

Supported preview types include thumbnails, descriptions, and video players for links to videos. If a link doesn't render as a rich preview, the URL domain isn't supported or we couldn't return the preview content.

The list of supported domains includes versions of URLs that third-party shorteners have shortened, like bitly, goo.gl, and tinyurl.com.

 **Note:** For a look-up list of supported URL domains, see the attachment to [Rich preview not generated for link post in Chatter](#).

SEE ALSO:

[Attach a Link to a File or Other Content to a Post](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

File Limits in Chatter

Here's a breakdown of the limits for files that are attached to a Chatter post or comment.

File Sharing Limits

A file can be shared a maximum of 100 times. This count includes shares with records, people, and groups. If a file is approaching the maximum, consider creating a public link or making the file public by posting it to your feed.

View the **Shared With** list on a file detail page to see who a file is shared with and their level of access.

File Size Limits

The file size limit for files that are attached to Chatter feed posts and comments is 2 GB.

File Privacy Limits

On private files, file metadata is not also private. A user without permission to access a private file can nonetheless access the file's metadata. So, for example, through a private file's metadata, an unpermitted user can see who's following the private file. Salesforce doesn't remove geolocation information from uploaded images.

Folder Deletion

You can't delete root folders from the org.

Polls

A poll contains a question and a list of possible replies. Poll your users and let them vote on their favorite response. People with access to the feed where the poll is posted cast their votes by selecting a reply.

Polls are a great way to gather opinions. For example, you are in charge of planning an annual sales meeting. You want to find out when most people are available to attend the meeting. Instead of emailing everybody in the sales organization, you could create a poll in the Sales Chatter group. The poll could list possible dates and ask for votes on the date that works best.

When you create a poll, anybody with access to the feed or the poll can vote on the poll. So when you post a poll, consider who you want to participate. For example, if you post a poll in a private group, only the members of that group can see the poll and vote. Keep the following in mind about polls:

- When you create a poll, you can add up to ten choices.
- When voting on a poll, you can select only one choice, but you can change that choice.
- Polls are anonymous. You can see how many people voted, but you can't see who voted.
- To see the latest poll result and the number of votes that were cast, click **Refresh**.
- You can't repost a poll.
- You can mention someone and include hashtag topics in the poll question.
- You and others can add topics to your poll question after posting.
- The email notification options that you enabled in your Chatter Email Settings apply to polls just as they do to posts. For example, if you get a notification whenever someone comments on one of your posts, you're also notified when someone comments on your poll.

 **Note:** The poll result doesn't always add up to 100 percent due to rounding. For example, if a poll has three choices and each gets one vote, the result adds up to 99 percent.

When you run a global or feed search, you don't see results for poll questions or options. Polls aren't indexed for searches.

[Create a Poll](#)

Create polls to gather people's opinions.

[Vote on a Poll](#)

Cast your vote on a poll.

SEE ALSO:

[Like Posts and Comments](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Create a Poll

Create polls to gather people's opinions.

1. Above the feed, click **Poll**.
2. Enter a question in the text box.
In the question, you can add a hashtag or mention someone.
3. Provide at least two choices.
To add another choice, click **Add more choices**. You can enter up to ten choices.
4. *Salesforce Classic only*: Select to post the poll to your followers or to a group.
If you're posting the poll to a group, select the name of the group from the dropdown list.
5. To post the poll, click **Share**.

SEE ALSO:

[Vote on a Poll](#)

Vote on a Poll

Cast your vote on a poll.

1. In the poll, select your choice.
You can only select one choice.
2. Click **Vote**.
The post shows the current result of the poll. To change your vote, click **Change vote** and select your new choice.

When you run a global or feed search, you don't see results for poll questions or options. Polls are not indexed for searches. The poll result doesn't always add up to 100 percent due to rounding. For example, if a poll has three choices and each gets one vote, the result adds up to 99 percent.

SEE ALSO:

[Create a Poll](#)

Topics List

Use the topics list to see the topics that people are talking about in your organization. All topic names appear in this list, including topics that are used solely in private groups or on records.

Watch a Demo: [Discover and Organize with Chatter Topics \(Salesforce Classic\)](#)

To view the topics list, on the left side of the Chatter page, click  **Topics**.

In the topics list, you can:

- To see a topic's detail page, click the topic name.
- To see updates in your Chatter feed, click  **Follow**.
- To narrow what you're looking for, [filter the list of topics](#).
- Search for topics by name.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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 **Tip:** To search topic names and descriptions, use global search.

- Only users with the View All Data permission can filter by record name.

This topics list isn't available in Lightning Experience. However, in Lightning Experience, you can add topics to records and then filter your record list views by topics.

[Sort the Topics List with Filters](#)

Use topic filters to narrow the topics list to your favorite topics or the topics that you use. Use sorting options to sort the topics by the number of people talking about them or alphabetically by name.

[Topic Detail Pages](#)

Topic detail pages show a topic's description and a feed with topic updates from all users and public groups. You can also see a list of records that refer to the topic.

[Follow Topics](#)

Follow topics so you can see updates in your Chatter feed.

[Find and Endorse People Who Are Knowledgeable About a Topic](#)

Discover and recognize experts using the Knowledgeable People section of topic pages and the Overview tab of user profile pages.

[Add Topics to Posts](#)

Add topics to posts and comments to make it possible to search for all the items that touch on that topic. You can add topics to any posts at any time directly in the feed.

[Add Hashtag Topics to Posts and Comments](#)

Add topics to posts and comments to organize them and make them easy to find.

[Add Topics to Files](#)

Topics make it possible to search for all the items that touch on a given topic. Topics added to feed posts are also added to any files in the post or its comments. When you search for those topics, the files are included in results.

[Remove Topics from Posts](#)

If a topic no longer applies to a post, you can remove it.

[View the Topics That People Are Talking About](#)

The topics you're talking about appear in your Chatter profile in the Recently Talked About section.

[View the Topics That Groups Are Talking About](#)

The topics that a group is talking about appear on the group detail page in the Recently Talked About section.

[Trending Topics](#)

The Trending Topics area on the Chatter tab shows the topics that are being discussed right now in Chatter.

[Topics in Mobile](#)

Topics are available in Salesforce for Android and Salesforce for iOS, but there are some differences in mobile applications.

Sort the Topics List with Filters

Use topic filters to narrow the topics list to your favorite topics or the topics that you use. Use sorting options to sort the topics by the number of people talking about them or alphabetically by name.

Under **Show** on the [Topics list](#), you can find filters to use to adjust your view of topics.

All

All topics that have been added to posts in your organization

My Favorites

Topics that you added to your favorites

Topics I Use

Topics that you added to posts and topics on posts that you commented on

In your filtered view of topics, you can sort by the following columns.

People Talking About This

Sorts by the number of people talking about the topic. People talking about the topic include:

- The number of people adding the topic to updates
- The number of people commenting on posts with the topic

Name

Sorts alphabetically by the topic name.

 **Example:** Only users with the View All Data permission can filter by record name.

Topic Detail Pages

Topic detail pages show a topic's description and a feed with topic updates from all users and public groups. You can also see a list of records that refer to the topic.

To open a topic detail page, click a topic or hashtag. On the topic detail page, you can:

- [Search a topic feed](#) to quickly find relevant information. You can also scan the feed to learn about the topic and see the people and public groups that are interested in it.
- See all the records that refer to the topics. Use the Related tab in Lightning Experience. In Salesforce Classic, if Chatter is enabled, use the Records tab.
- To see updates to the topic in your feed, follow the topic.
- Edit the topic name and description. You can change only the capitalization and spacing of topic names.

 **Note:** Topic names and descriptions aren't private, even for topics that appear solely in private groups and on records. Posts and records that use topics have the same security and privacy as the posts and records that don't use them.

- Add a post directly to the topic feed in Salesforce Classic. Your followers automatically see the post, and you can even add the post to a group that you're a member of by using an @mention. Because you added the post on the topic feed, the topic is automatically added to your post.
- Discover interesting topic metrics. If you're using Lightning Experience, you can see the number of:
 - People following the topic
 - Posts that use the topic

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To add existing topics to posts and comments:

- Assign Topics

To edit topic names and descriptions:

- Edit Topics

 **Note:** The number of posts that use the topic can be inaccurate but provides a good comparative measure of how often people use the topic in posts.

- People who used the topic in the last 60 days
- If available, find out more about a topic using these lists.
 - Knowledgeable People—People who are knowledgeable about the topic.
 - Related Topics—Other topics that were also added with the current topic.
 - Recent Files—Files that you have access to that were most recently posted to the topic feed.
 - Groups Talking—Public groups and groups that you're a member of that used the topic most recently.

Follow Topics

Follow topics so you can see updates in your Chatter feed.

To follow a topic, click **Follow** in one of these locations:

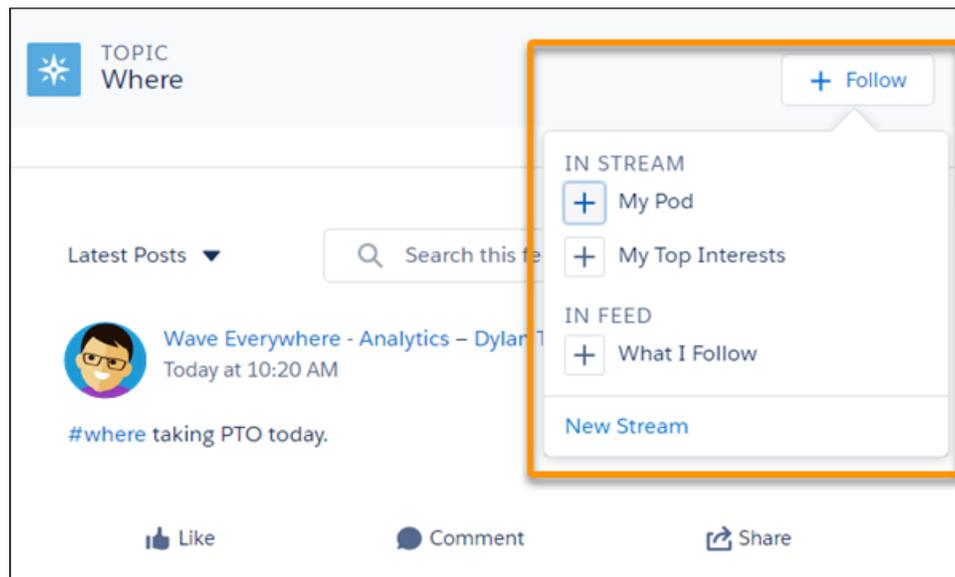
- Topic detail page

If the **Follow** button on the topic detail page has a **+** in front of it (Lightning Experience), you have more options. To see options for following the topic and for adding it to a new or existing stream, click the button. To follow the topic from the menu, click **What I Follow**.

EDITIONS

Available in: both Salesforce Classic (**not available in all orgs**) and Lightning Experience

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



 **Note:** You can find streams in Lightning Experience on the Chatter home page.

- Topics list (Salesforce Classic only)

You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

To stop following a topic, click **Following** (Lightning Experience) or click **x** next to Following (Salesforce Classic). After you stop following a topic, you don't see future updates to the topic in your Chatter feed.

If your administrator disables feed tracking for topics, you can't follow new topics. However, you continue to follow the ones that you followed when feed tracking was enabled. These topics count toward the maximum number of people, topics, and records that you can follow. To stop following a topic after your administrator disables feed tracking, you must use Connect REST API.

SEE ALSO:

[Create a Stream from a Profile or Record Detail](#)

Find and Endorse People Who Are Knowledgeable About a Topic

Discover and recognize experts using the Knowledgeable People section of topic pages and the Overview tab of user profile pages.

Available in: Salesforce Classic

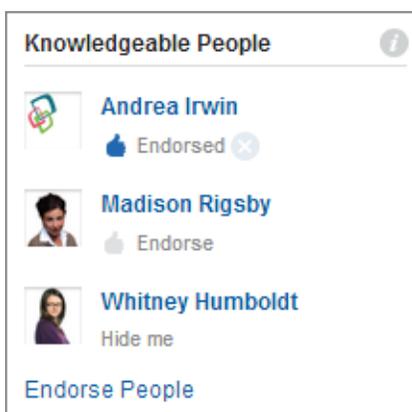
Available in: **Group, Enterprise, Professional, Performance, Unlimited, Contact Manager**, and **Developer** Editions

The topic page shows the five people who are most knowledgeable about the topic. Ranking is based on their activity on the topic and the recognition they've received for the topic. For example, Chatter considers how often people:

- Are mentioned in posts or in comments on posts with the topic
- Receive likes on comments on posts with the topic
- Receive endorsements for the topic

Endorsements are a strong signal of knowledge, so if someone endorses you, you're automatically included on the list of knowledgeable people.

 **Note:** Knowledgeable people are calculated and updated once a day.



To change endorsements:

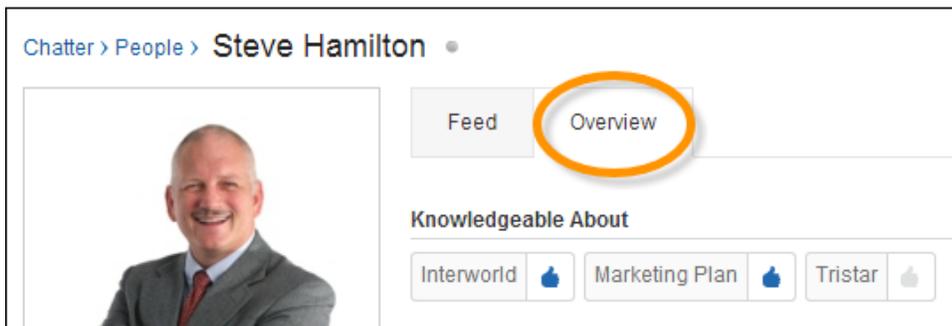
- Endorse someone you think is knowledgeable about a topic by clicking **Endorse** under the person's name. If the person you want to endorse doesn't appear in the Knowledgeable People section, click **Endorse People**. Endorse People shows the full list, which you can search. (You can't endorse Chatter Free users, customers, or yourself.)
- Remove your endorsement of someone at any time by clicking  next to **Endorsed** under the person's name. Removing your endorsement of someone doesn't necessarily remove them from the knowledgeable people list. Other people can still endorse them, or they could already have significant activity on the topic.

To remove yourself from the knowledgeable people list:

- Opt out by clicking **Hide me** under your name. No one can see you on the list after you hide yourself. If you change your mind, you can opt in again by clicking **Endorse People** and then **Show me** next to your name.

To see a person's full range of expertise:

- Navigate to their user profile page, and click the Overview tab.
 - To see topic detail pages, click a topic name.
 - To add or remove your endorsements, click the thumbs-up icon.



Add Topics to Posts

Add topics to posts and comments to make it possible to search for all the items that touch on that topic. You can add topics to any posts at any time directly in the feed.

These steps outline how to add topics in Salesforce Classic. In Lightning Experience, when you post or comment, add a topic by putting a hashtag (#) in front of your topic terms, for example, #sales quotas.

 **Note:** All topic names appear in the topics list and all topic names and descriptions are searchable. This visibility includes topics that are used solely in private groups or on records.

1. In the top corner of the post, click .
2. Click **Add Topics** or **Edit Topics**.
3. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

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

Posts can have up to 10 topics.

4. When you're done adding topics, click **Done** or press ENTER.

A topic becomes a link to its detail page. On the topic detail page, you can see all the posts that you have access to that use the topic.

When you add topics to posts that contain files, the topics are also added to those files.

SEE ALSO:

[Add Hashtag Topics to Posts and Comments](#)

[Add a Topic as a Favorite](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To add existing topics to posts and comments:

- Assign Topics

To add new topics to posts and comments:

- Create Topics

Add Hashtag Topics to Posts and Comments

Add topics to posts and comments to organize them and make them easy to find.

For example, let's say you post that you're working on a sales presentation for your customer Universal Paper. You can add the hashtag topic **#Universal Paper** in your update. Anyone can click the topic to find out more information about Universal Paper and to see which people and groups are talking about Universal Paper. Anyone can search for Universal Paper, and the topic appears in search results. Click the topic to see all the places that you have access to where the topic is assigned.

 **Note:** When you add topics to posts that contain files, the topics are also added to those files.

1. When writing an update, type # followed by any text. As you type, pick a topic from the list of suggestions or press ENTER to add a topic. Topics can be up to three words.

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

2. Click **Share**.

The hashtag topic becomes a link to the topic detail page. The topic (without the hashtag) is also automatically added to the top-level post in the update. For example, if you include **#Universal Paper** in a comment under your coworker's post, the topic **Universal Paper** is added to your coworker's post.

Once you post an update, the only way to remove a hashtag topic in Lightning Experience is to delete or edit the post or comment. In Salesforce Classic, you can remove the topic from the top-level post.

SEE ALSO:

[Add Topics to Posts](#)

Add Topics to Files

Topics make it possible to search for all the items that touch on a given topic. Topics added to feed posts are also added to any files in the post or its comments. When you search for those topics, the files are included in results.

To add topics to files posted in feeds, [add topics to the post](#) where the file is attached. You can add regular topics or [hashtag topics](#). The topics are automatically added to any files that are attached to the post or its comments.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To add existing topics to posts and comments:

- Assign Topics

To add new topics to posts and comments:

- Create Topics

USER PERMISSIONS

To add topics to files

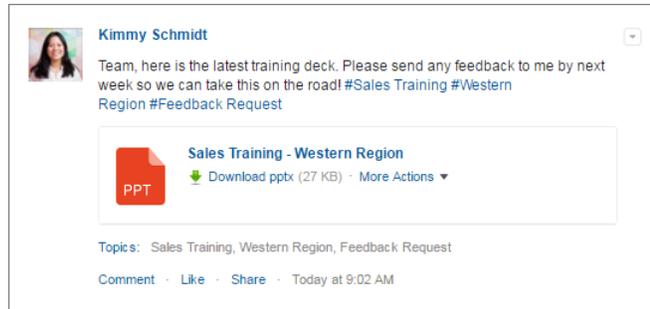
- Viewer access to the file

AND

Assign Topics (to add existing topics)

OR

Create Topics (to add new topics)



Example:

Since Kimmy added the topics `Sales Training`, `Western Region`, and `Feedback Request` to a post, these topics are also added to the attached file. Now, coworkers can click a topic to find other posts, files, and records associated with that topic.

In Lightning Experience, go to the **Related** tab to see all records with a topic. Click **View All** for the entire list, and sort by Object Type to see all the files with the topic.

In Salesforce Classic, go to the **Records** tab and choose **Files**. Otherwise, use the **Feed** tab to see all posts and files for the topic.

Remove Topics from Posts

If a topic no longer applies to a post, you can remove it.

You can remove topics from posts in the feed, whether they're regular topics or hashtag topics. Removing topics—whether below or inside the post, like hashtags—doesn't delete them altogether. It only removes them from the post. Before you remove a topic from a post, consider whether you or someone else added it. Someone that you're not aware of may be tracking updates using topics.

1. In the top corner of the post, click .
2. Click **Edit Topics**.
3. Click  next to the topic you want removed from the post.
4. Click **Done** or press ENTER.

Removing a topic from a post removes the post from the topic feed on the topic detail page and from the feeds of any followers.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To remove topics from posts:

- Assign Topics

View the Topics That People Are Talking About

The topics you're talking about appear in your Chatter profile in the Recently Talked About section.

This section helps people learn which topics you're knowledgeable about or interested in. These topics are the ones that you and others have frequently and recently (within the last two months) added to your posts and comments. For privacy reasons, Recently Talked About topics don't include topics used solely in private groups or record feeds. You can see up to five topics, with the most frequently and recently added topic appearing first. If you're new to topics or you haven't used topics in the last two months, the Recently Talked About section doesn't appear. Click a topic in the Recently Talked About section to see the topic detail page.



Note: On profile pages, if the Knowledgeable About list or WDC Skills is enabled, it replaces the Recently Talked About section.

View the Topics That Groups Are Talking About

The topics that a group is talking about appear on the group detail page in the Recently Talked About section.

This section helps people understand which topics a group is knowledgeable about or interested in. These topics are the ones most frequently and most recently added to group posts over the last two months. You can see up to five topics, with the most frequently and recently added topic appearing first. If a group isn't using topics, the Recently Talked About section doesn't appear. Click a topic in the Recently Talked About section to see the topic detail page.

Trending Topics

The Trending Topics area on the Chatter tab shows the topics that are being discussed right now in Chatter.

Trends result from how often people add a topic to their feeds and comment on or like posts with the same topic. For example, let's say your coworkers plan to attend an upcoming Dreamforce conference. They've started discussing it in Chatter. It's likely that you see a trending topic for Dreamforce.

A trending topic is not solely based on popularity. Trends usually relate to a one-time or infrequent event that has a spike in activity, like a conference or a project deadline. For privacy reasons, Trending Topics don't include topics that are used solely in private groups or record feeds.

SEE ALSO:

[View the Topics That People Are Talking About](#)

[View the Topics That Groups Are Talking About](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Topics in Mobile

Topics are available in Salesforce for Android and Salesforce for iOS, but there are some differences in mobile applications.

When using topics in Salesforce for Android and Salesforce for iOS, you can't:

- See trending topics.
- Edit topic details (name and description).
- Tag favorite topics.
- Assign topics to records.
- See the Related Topics and Knowledgeable on Topics related lists.
- See topics in auto-complete options when searching using hashtags.

Share a Chatter Post

Sharing lets you quickly copy a public post to your profile or a group. This feature is available in Salesforce Classic and Lightning Experience.

In Salesforce Classic, you can share public Chatter posts that contain text, links, or files. You can share to your profile, with a group, or using a link to the post. In Lightning Experience, you can share posts with your followers and with groups. In both cases, comments aren't shared. But a shared post links back to its original, where users can see the comments.

When you share a post, keep in mind:

- When you share with a group, you can share only with a group you're a member of.
- You can't share a post from a private group.
- You can't share a post to a private group that includes external users.
- In Salesforce Classic, you can share a post to your own profile, but not to another person's profile.
- In Salesforce Classic, you can share the original post, including any files and attachments, but you can't share any comments or likes.
- In Lightning Experience, you share only the post. Attachments, comments, and likes aren't shared.
- You can comment on a shared post.
- In Lightning Experience, when you edit the original of a post that's shared, the shared version is updated.
- You can't share feed tracked items and custom feed items, such as approvals, dashboard snapshots, or case interactions.
- You can't share a post from a record feed.
- Only Chatter users inside your company can see a post that you shared through a link in an email or an instant message.

The Chatter email notification setting for post sharing applies only to posts shared in Salesforce Classic. If notification for sharing is enabled, when someone shares your post in Salesforce Classic, you receive an email notification.

 **Tip:** To change your email notifications, go to Settings, enter *email notifications* in the Quick Find box, then select **Email Notifications**.

In Lightning Experience, when someone shares your post, you don't receive an email notification.

[Share a Chatter Post to Your Profile](#)

In Salesforce Classic, copy a public post to your profile to share it with the people who follow you.

EDITIONS

Available in: Salesforce for Android, Salesforce for iOS

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

EDITIONS

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

[Share a Chatter Post with a Group](#)

You can share posts with public groups and groups that you're a member of. You can't share a post to a private group that includes external users. You can share public posts, but you can't share feed tracked items and custom feed items, like approvals, dashboard snapshots, or case interactions. You can't share posts with archived or unlisted groups or private groups that include external users. A post's comments aren't shared. But the shared post links back to the original, where comments are available. In Salesforce Classic, files attached to the shared post are included, but in Lightning Experience attached files aren't shared.

[Share a Link to a Chatter Post](#)

In Salesforce Classic, share a post with other Chatter users via email or instant message.

[Share a Link to the Detail View of a Chatter Post](#)

The Share feature in the Chatter publisher includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like. Paste it in the Chatter publisher to see a preview of the post that you're linking to.

[View a Single Chatter Post](#)

You can navigate to a detailed view of a Chatter post in a feed for a user, record, or group.

SEE ALSO:

[View a Single Chatter Post](#)

[Share a Link to the Detail View of a Chatter Post](#)

Share a Chatter Post to Your Profile

In Salesforce Classic, copy a public post to your profile to share it with the people who follow you.

Available in: Salesforce Classic

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

In Salesforce Classic, you can share public posts, but you can't share feed tracked items and custom feed items. Examples of custom feed items include approvals, dashboard snapshots, and case interactions.



Note: Depending on their Chatter email notification settings, when you share a post, the person who posted the original is notified. In Lightning Experience, the person who posted the original isn't notified. The email notification setting applies only to posts shared in Salesforce Classic.

1. In Chatter, go to the post you want to share.
2. Click **Share**.
3. From the dropdown list, select **My Followers**.
4. Optionally, write a comment about the post.
5. Click **Share**.
The shared post appears in the Chatter feed on your profile.

SEE ALSO:

[Post Visibility](#)

Share a Chatter Post with a Group

You can share posts with public groups and groups that you're a member of. You can't share a post to a private group that includes external users. You can share public posts, but you can't share feed tracked items and custom feed items, like approvals, dashboard snapshots, or case interactions.

You can't share posts with archived or unlisted groups or private groups that include external users. A post's comments aren't shared. But the shared post links back to the original, where comments are available. In Salesforce Classic, files attached to the shared post are included, but in Lightning Experience attached files aren't shared.

You can share a post with your followers and with a group. The posts you share with your followers appear in your profile feed.

 **Note:** The sharing email notification setting applies only to posts shared in Salesforce Classic. If notification for sharing is enabled, when you share a post, the person who posted the original is notified. In Lightning Experience, the person who posted the original isn't notified.

1. In your Chatter feed, go to the post you want to share.
2. Click **Share**.
3. From the Share menu, select **A Group**.
In Lightning Experience, the option is **Share with Group**.
4. Enter part of the group name and select the group from the list.
5. Type a comment about the post or leave the comment field blank.
6. Click **Share**.
The shared post appears in the selected group's feed.

SEE ALSO:

[Post Visibility](#)

Share a Link to a Chatter Post

In Salesforce Classic, share a post with other Chatter users via email or instant message.

Available in: Salesforce Classic

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

When sharing a link to a post in Salesforce Classic, keep in mind:

- You can't share a link to a post from a private group.
 - You can't share a post to a private group that includes external users.
 - You can share public posts, but you can't share feed tracked items and custom feed items, like approvals, dashboard snapshots, or case interactions.
 - To see the post, the people to whom you send the link to the post must be Chatter users.
1. In the Chatter feed, go to the post you want to share.
 2. Click **Share**.
 3. In the top corner, click **Show link to post**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

- Copy the link, paste it in an email or instant message, and send it. When recipients of the email or instant message click the link, the post appears in their Chatter updates.

 **Note:** You can also share a link to a post in Lightning Experience. For more information, see [Share a Link to the Detail View of a Chatter Post](#).

SEE ALSO:

[Post Visibility](#)

Share a Link to the Detail View of a Chatter Post

The Share feature in the Chatter publisher includes a Copy Link option. Use it to grab a link that jumps directly to the detail view of a post. Copying places the link on your clipboard. You can paste the link wherever you like. Paste it in the Chatter publisher to see a preview of the post that you're linking to.

The version of copy link presented in this topic is available in Lightning Experience. Salesforce Classic also has a copy link feature. For more information, see [Share a Link to a Chatter Post](#).

 **Note:** You aren't notified when someone shares a link to one of your posts.

- In your Chatter feed, go to the post you want to share.
- Click **Share**.
- In the dropdown list, select **Copy Link**.
- In the Copy Link to Thread dialog, click **Copy Link**.
The link is copied to your clipboard.
- Paste the link wherever you like, in an email, a message, or to a post on another feed.
When you click the link, it jumps to the detail view of the post. In detail view, you can see the post, its attachments, and its comments.

View a Single Chatter Post

You can navigate to a detailed view of a Chatter post in a feed for a user, record, or group.

- In a feed, click the date and time stamp below the post, for example, **July 23, 2019 at 2:40 PM**.

EDITIONS

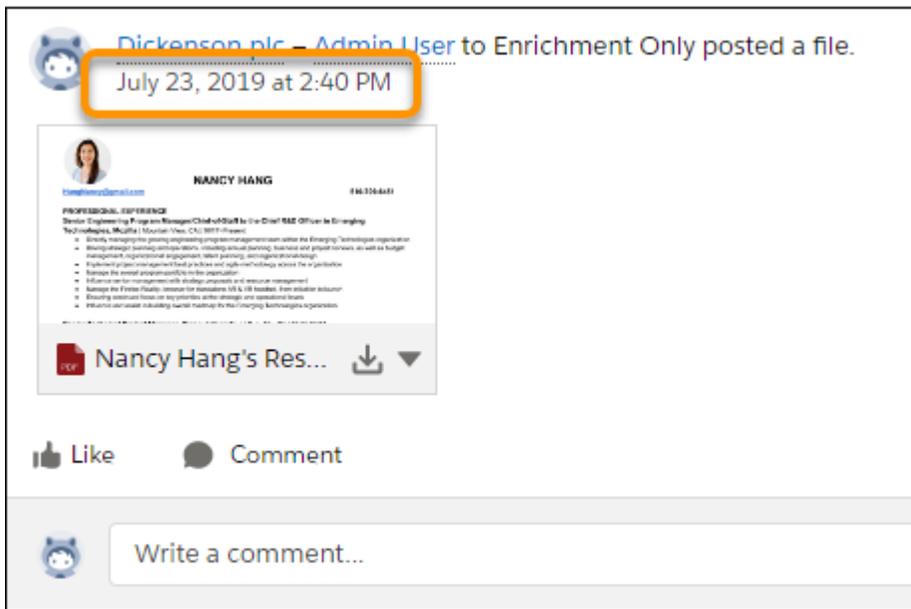
Available in: Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



- In a Chatter email notification, click the link in the body of the email.
- To return to a view of the full feed, select the **All Updates** filter.

SEE ALSO:

[Share a Link to a Chatter Post](#)

People in Your Organization

Update your personal profile, and view the profiles of other people in your organization.

[People Overview](#)

The People tab and the People list on the Chatter tab show a list of recently viewed users in your organization. If your org has 25 people or fewer, these lists show everyone.

[Chatter Profile Overview](#)

Customize your personal Chatter profile. Add a photo and information about yourself so others can learn more about you.

[Profile Best Practices and Considerations](#)

Tips and limitations for using profiles.

[Set an Out of Office Message in Chatter](#)

Taking some time off? It's easy to set up an out-of-office message in Chatter. Schedule your message, and decide what it says. Out of Office is available only in Lightning Experience.

[Use the Following and Followers Lists in Salesforce Classic](#)

View the Following and Followers lists on your profile to see who, what, and how many items you're following, and who's following you.

[People Recommendations](#)

Chatter recommends people for you to follow based on similar interests.

[Give Thanks to Your Coworkers](#)

Recognize your coworkers with badges and post your thanks directly to their Chatter feed.

[Files Owned Lists on Profile Pages](#)

The Files Owned list on a person's profile page shows the files that the person most recently attached to a Chatter post.

[Chatter Activity and Influence](#)

Check your Chatter influence, and see your personal Chatter activity statistics. Check such statistics as how many posts you've made and how many likes or upvotes you've received.

[Invite People to Join Chatter](#)

If enabled by your administrator, you can invite people to use Chatter who also work for your company but don't have Salesforce licenses.

[Moderate Chatter Free Users](#)

A moderator is a Chatter user with some additional privileges.

People Overview

The People tab and the People list on the Chatter tab show a list of recently viewed users in your organization. If your org has 25 people or fewer, these lists show everyone.

- To view someone's profile, click their name or photo.
- In profile view, if you want to see a person's updates in the Chatter feed, click **Follow**. In Lightning Experience, after you click **Follow**, click the plus sign next to What I Follow. In both environments, you can't follow [customers](#).
- In profile view, to stop seeing a person's updates in the Chatter feed, click **Following**. In Lightning Experience, after you click **Following**, click the check mark next to What I Follow.
- To sort the list, click a column header, for example, the **Full Name** column sorts alphabetically by first name. By default, the list is sorted alphabetically, in ascending order.
- Search for users by entering a first or last name in the search box at the top of the page. The list automatically filters based on what you type.
- As of Spring '19 external users appear in the user lookup for people who use Lightning Experience.
- Your organization's size determines what you see in the people list. For example, in the largest organizations, we don't display any users until you start searching for a person's name. We count all Salesforce user license types when calculating the approximate number of users, including internal users, Experience Cloud site users, and Chatter users.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Approximate number of users	Defaults to view	All People filter defaults to
25 or fewer	All People	Everyone in the organization
26 to 25,000	Recently Viewed People	People whose profiles you recently viewed
More than 25,000	Recently Viewed People	No one until you start searching

- [Invite people](#) to join your Chatter network. Invited users can view profiles, post on their feed, and join groups, but they can't see your Salesforce data or records.
- View the people that Chatter recommends that you follow. Click **More** in the Recommended People section to view all of your recommendations. If no recommendations appear, then you're already following all the recommended people.

Chatter, Profile, People, Groups, and Files tabs are available by default in the Chatter app. If you don't see Chatter, you can open it using the App Launcher at the top-right corner of any page. If your administrator has added these tabs to other apps, you see the tabs in those apps unless you previously customized your display. In that case, you can add the tabs to those apps.

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different between desktop and mobile for People and Profiles. When using People to view profiles, you can't:

- Edit profile information in Salesforce for iOS.
- Upload a profile photo using the Good Access™ secure mobile browser.
- Hover on user profile photos to quickly see user information.
- Use custom profiles.
- Filter the Following related list on your profile.

SEE ALSO:

[Moderate Chatter Free Users](#)

Chatter Profile Overview

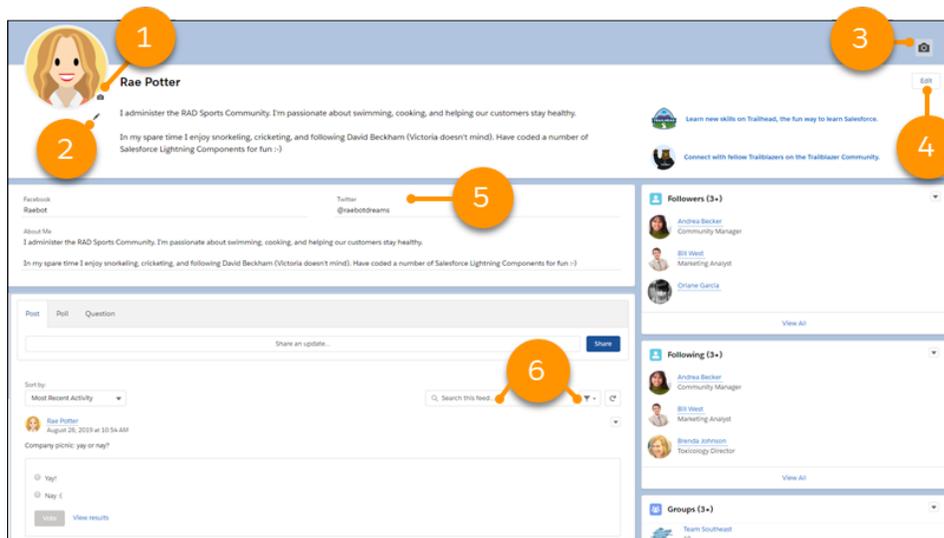
Customize your personal Chatter profile. Add a photo and information about yourself so others can learn more about you.

Click your name anywhere in Salesforce to view your profile. If available, you can also click the Profile tab or *Your Name* > **My Profile** at the top of the page. In Lightning Experience, click *Your Name*, and then click *Your Name* again in the dialog. View other people's profiles by clicking their name.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



From this page you can:

- Change your profile picture. (1)
- Edit your About Me statement by clicking the pencil icon under your profile image. (2)
- Edit your page banner. (3)
- Edit your personal statement. (4)
- Add links to your social media accounts. (5)
- Search and filter your profile feed. (6)

SEE ALSO:

[Profile Best Practices and Considerations](#)

[People Recommendations](#)

Profile Best Practices and Considerations

Tips and limitations for using profiles.

- Information in the About Me section is searchable and makes you more visible to others.
- Your posts appear in your profile feed and the What I Follow feeds of the people who are following you. To delete your posts, in Salesforce Classic mouse over the post and click ; in Lightning Experience, select **Delete** from the post's actions menu.
- To change your email address, in Salesforce Classic click the edit icon next to the Contact heading; in Lightning Experience, edit your profile.
- Not all users have profiles. For example, portal users and the Connection User in organizations that use Salesforce to Salesforce don't have profiles.
- Chatter External Users have access to a limited number of fields. Available fields include:
 - Name
 - Title
 - Email
 - Company
 - Nickname
- You can't choose what displays when a user mouses over a profile.

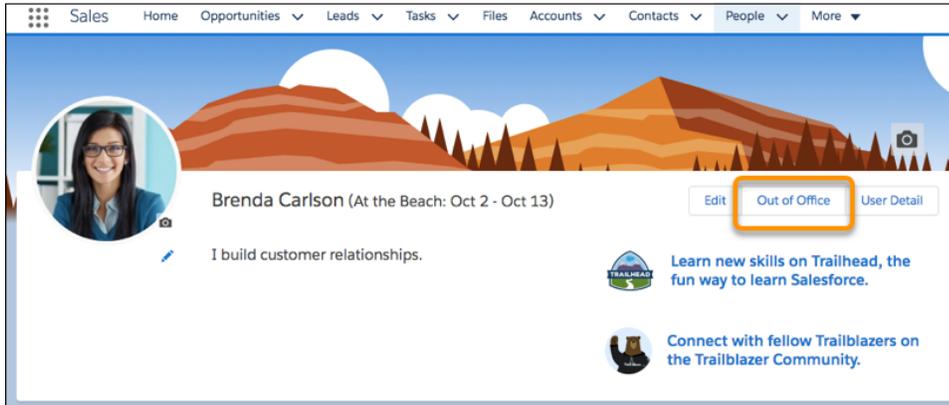
EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Set an Out of Office Message in Chatter

Taking some time off? It's easy to set up an out-of-office message in Chatter. Schedule your message, and decide what it says. Out of Office is available only in Lightning Experience.



1. On your profile, click **Out of Office**.
2. Enable **Set Out of Office message**.

Out of Office

Set Out-of-Office message

* Start Date

* End Date

* Message

3. Select the start date for the time you're out of the office. The start date is just to let people know when you're out. The message appears next to your name when you save it. It doesn't wait for the start date.
4. Select the end date. Your message expires after the end date.
5. Leave the message as it is, or customize it.
6. Click **Save**.
7. Enjoy seeing your custom (or not so custom) message appearing nearly everywhere your name appears in Chatter.

Use the Following and Followers Lists in Salesforce Classic

View the Following and Followers lists on your profile to see who, what, and how many items you're following, and who's following you.

If you're not following anyone, click **Find people to follow** in the Following list to view the People list and start following people. You can also see the Following and Followers lists on other people's profiles. When your Salesforce admin enables Chatter, you automatically follow some users and records in your org.

In either list, click **Show All** to view the full list in alphabetical order.

- Use the **Next** and **Previous** links to see more of the list.
- Optionally filter the Following list by people or objects, for example, accounts or files.
- In your Following list, click  to stop following a person or record.
- In another person's Following list, click  **Follow** to follow a person or record.
- In any Followers list, click  **Follow** to follow a person, or  to stop following them.
- To close the window, click **Done**.

SEE ALSO:

[Post Visibility](#)

[People Recommendations](#)

People Recommendations

Chatter recommends people for you to follow based on similar interests.

Chatter recommends people who:

- Follow the same people as you.
- Are in your management hierarchy, such as your manager, people who report to your manager, and people who report to you.

Salesforce uses the `Manager` field on your personal information page to determine these recommendations. If this field is blank, Chatter doesn't recommend people based on your management hierarchy. Only your Salesforce administrator can edit the `Manager` field.

- Are popular, which means they have many followers.
- Are new to Chatter.
- Are interested in the same records as you. For example, someone who has looked at or edited an account that you've recently viewed.
- Are followed by the people who follow the same people as you. For example, let's say you follow Madison Rigsby. Many people who follow Madison also follow Suzanne Powell, so Chatter recommends Suzanne to you.

To see an expanded list of your recommendations, click **More** in the Recommendations section. If no recommendations appear, then you're already following all the recommended people.

SEE ALSO:

[Chatter Profile Overview](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Give Thanks to Your Coworkers

Recognize your coworkers with badges and post your thanks directly to their Chatter feed.

-  **Note:** The Chatter Free license has limited functionality with Thanks features. Rewards features require a WDC license. This includes giving, creating, or receiving badges tied to rewards.

Thank someone if they've done a great job or to recognize an achievement.

1. From the Chatter publisher, click **Thanks**.

If **Thanks** isn't displayed, click **More** and select **Thanks** from the publisher's drop-down menu.

2. Type the name of the person you want to thank.

Currently, you can only thank one person at a time, but you can mention other people in your post's message.

3. Select **Change Badge** to select a different badge for your post or keep the default badge.

You can choose from twelve pre-defined badges. Select the badge image to see more information about the badge.

4. Type a message for the person you're thanking.

5. Select your audience.

- **My Followers** to post to all your followers
- **A Group** to post to a specific group. Search for the group and select the group from the list. The person you're thanking is @mentioned at the beginning of the post's message. When you post to a private group, only the group's members can see your post to the group. However, the badge will also appear publicly on the Recognition tab of the recipient's profile.

6. Click **Share**.

Your Thanks post appears in your feed and the feed of the person you're thanking. If you're posting to a public group or a record page, the post appears on the group or record feed and their profile. If you're posting to a private group, only members of the private group can see your post to the group. However, the badge will also appear publicly on the Recognition tab of the recipient's profile.

Files Owned Lists on Profile Pages

The Files Owned list on a person's profile page shows the files that the person most recently attached to a Chatter post.

The list includes files that the profile owner attached to a profile post, a group, or a record, or uploaded to Salesforce CRM Content libraries. To see available file options, mouse over the file's name. To go to a file's detail page, click the file's name.

Click **Show All** to see a list of all the files that the profile owner attached and uploaded. The list doesn't include files that you don't have access to, documents from the Documents tab, or attachments from the Notes and Attachments list. On the files list you can:

- Upload private files or share files with people, groups, or via a link
- Preview a file, if a preview is available
- To receive updates in your feed, follow a file
- To view the file detail page, click the file name

SEE ALSO:

[Filter Your Files List](#)

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** that have Chatter enabled.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Chatter Activity and Influence

Check your Chatter influence, and see your personal Chatter activity statistics. Check such statistics as how many posts you've made and how many likes or upvotes you've received.

Chatter activity statistics include the number of your posts and comments, comments received, and people who like or upvote your posts and comments. Chatter influence shows how your activity stacks up to other people's.

- Top Influencers lead collaboration efforts by regularly sharing essential content.
- Active Influencers encourage others to get involved and share knowledge.
- Observers are quiet participants or just getting started in Chatter.

You can see your Chatter activity statistics and influence on your profile under your photo. You can also see your coworkers' Chatter activity and influence on their profiles. When viewing a profile, hover over  under the profile photo for details about how that person is uniquely influential.

SEE ALSO:

[Chatter Profile Overview](#)

Invite People to Join Chatter

If enabled by your administrator, you can invite people to use Chatter who also work for your company but don't have Salesforce licenses.

Invite Unlicensed Co-Workers to Chatter

Invited users can view profiles, post on their feed, and join groups, but they can't see your Salesforce data or records.

You can [invite users](#) from the People tab or when adding members to a group.

Also, you can add customers to private groups that you own or manage.

To invite people to Chatter:

1. On the Chatter page, click **Invite Coworkers!**



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

Portal users can't send invitations.

2. To send invitations from Chatter, enter email addresses and click **Send**.
3. To send invitations using your own email account, click **send your own email invitation**.

If you have set a default email client, an email with an invitation link opens in your mail program. Otherwise, you see an invitation link that you can copy and paste into an email.

Invite Unlicensed Co-Workers to a Public Chatter Group

You can also invite coworkers to join a public group, even if they don't use Chatter yet. Owners and managers of private groups can send invitations. If customer invitations are enabled, owners and managers can also invite customers. When someone accepts an invitation to join the group, they join Chatter as well.

1. Click the **Groups** tab, and click a group name.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To invite people to Chatter:

- Allow Invitations

- In the Manage Members section on the group detail page, click **+ Add** next to a member's name to add them to the group. You can also search for members.

If you're the group owner or manager, you can also click **Add/Remove Members**, then click **Invite them to Salesforce Chatter!**.

- Enter email addresses, and click **Send**.

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

A user has up to 60 days to accept an invitation to join Chatter. If during that time, an administrator deselects **Allow Invitations** or removes the user's domain from the list, the user can't accept the invitation.

When delegated authentication single sign-on is enabled in your organization, invited users bypass the password registration page. If their username exists, they can't accept the invitation.

SEE ALSO:

[Chatter Customers in Private Groups](#)

Moderate Chatter Free Users

A moderator is a Chatter user with some additional privileges.

These privileges include:

- [Activate or deactivate Chatter Free users](#)
- [Assign a Chatter Free user as moderator or take the privilege away](#)
- Delete the posts and comments that they can see

You can tell if someone is a moderator by the special banner on their profile picture.



[Assign Moderator Privileges to Chatter Free Users](#)

As a moderator, you can assign moderator privileges to Chatter Free users in your organization. If needed, you can also remove moderator privileges.

[Deactivate Chatter Free Users](#)

As a moderator, you can deactivate Chatter Free users if, for example, they left the company.

SEE ALSO:

[What Your Chatter Group Role Lets You Do](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

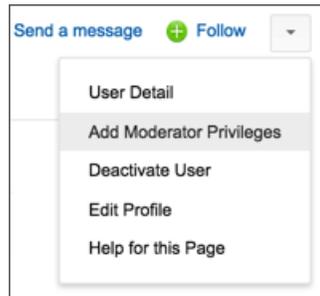
To moderate Chatter:

- Moderate Chatter

Assign Moderator Privileges to Chatter Free Users

As a moderator, you can assign moderator privileges to Chatter Free users in your organization. If needed, you can also remove moderator privileges.

1. To go to the person's profile page, click their name in the People tab or on a feed.
2. On the profile page, the user action menu provides options for adding or removing moderator privileges and deactivating a user.



- If you want the person to be a moderator, select **Add Moderator Privileges**.
- If the person is a moderator and you want to revoke those privileges, select **Remove Moderator Privileges**.

SEE ALSO:

[Change Chatter Group Roles](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To assign moderator privileges to Chatter Free users:

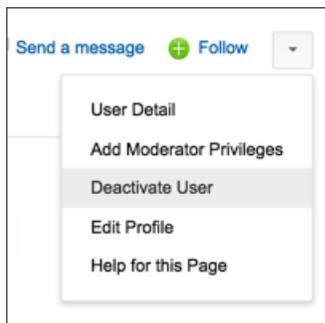
- Moderate Chatter

Deactivate Chatter Free Users

As a moderator, you can deactivate Chatter Free users if, for example, they left the company.

When the owner of a Chatter group is deactivated, the deactivated user still owns the group. But a user with the Modify All Data permission can assign a new owner for a public or private group. For unlisted groups, a user with the Manage Unlisted Groups permission can assign a new owner.

1. To go to the person's profile page, click their name in the People tab or on a feed.
2. On the profile page, click **Deactivate User** from the user action menu.



If you want to reactivate a Chatter Free user, use global search to find their profile. You use global search because deactivated users don't appear on the People tab.

Records and List Views

Configure your follow settings for records, view a Chatter feed on a list view, and learn more about record recommendations.

[Automatically Follow the Records That You Create](#)

When you follow a record, information about updates to tracked record fields are sent to your What I Follow feed.

[Viewing Record Feeds](#)

View the Chatter feed associated with a record you follow to see updates about the record.

[Record Recommendations](#)

Following records helps keep you up-to-date on important changes to accounts, contacts, opportunities, and more.

[Record Feed List View Limitations](#)

Limitations for list views on record feeds.

[View Chatter Feeds on List Views](#)

Switch to an object's Chatter feed directly from a list view to see updates for the records included in the list view.

[Follow Dashboards and Post Snapshots](#)

Chatter lets you track updates to your feed-tracked dashboards and post dashboard snapshots. The snapshot posts help other users follow changes in the dashboard data.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To deactivate Chatter Free users:

- Moderate Chatter

Automatically Follow the Records That You Create

When you follow a record, information about updates to tracked record fields are sent to your What I Follow feed.

By default, you don't automatically follow the records that you create. If you want to automatically follow such records, you can enable auto-follow in your Chatter Settings.

1. To open your personal settings, click your profile image at the top of the page, and then click **Settings**.
2. Enter *My Feeds* in the *Quick Find* box, then click **My Feeds**.
3. Select *Automatically follow records that I create*.
4. Click **Save**.

Consider the following tips for auto-following records:

- By default, when you create a child record, the owner of the parent record becomes the owner of the child record. But, despite your **Automatically follow** setting, you don't automatically follow the child record. You must follow the child explicitly, even when you're the owner of the parent.
- The `Account Owner` record field is updated to change the account owner. The new account owner follows the account automatically only if the `Account Owner` field is feed-tracked and the new account owner has auto-follow enabled.
- If a workflow changes the `Account Owner` field while the record is created, the user who created the record doesn't automatically follow the account.

Consider the following scenario. You're creating a record. Saving the record starts a workflow that immediately reassigns the `Account Owner` field to another user and then saves the record. The workflow changes the `Account Owner` field before the record is saved. So, you don't follow the record automatically because you never were the record owner, even though you technically created the record.

SEE ALSO:

- [Viewing Record Feeds](#)
- [Record Recommendations](#)

Viewing Record Feeds

View the Chatter feed associated with a record you follow to see updates about the record.

Available in both: Salesforce Classic and Lightning Experience

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

Record feeds allow you to track information for records you have access to. On the record detail page, click **Show Feed** to display the record feed above the account details.

-  **Note:** Access is all-important. For example, let's say you reassign a record and then realize it needs an update. Often, you can open and update the record. But if, after the reassignment, you no longer have access, then you won't be able to see or update the record.

In the record feed, you can

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To view a record:

- Read on the record

- View posts, comments, and tracked field changes.
- Write an update about the record and share it with other people who follow the record.

Updates on the record detail page also appear on the Chatter page of people who follow the record. Anyone who has access to the records can see the update in the All Company (Salesforce Classic) feed. They may see the update in the Company Highlights (Lightning Experience) feed, depending on the update's popularity ranking and engagement (such as comments, likes, and views).

- See who is following the record.
- Search the [record feed](#) ().

 **Note:** Record field changes in the feed aren't included in search results.

Record Recommendations

Following records helps keep you up-to-date on important changes to accounts, contacts, opportunities, and more.

Chatter recommends records that you've viewed or edited, records that you own (but aren't following), and parent accounts of records that you're following.

Chatter doesn't recommend records that your Salesforce administrator has disabled feed tracking for. Only opportunities, accounts, leads, contacts, and articles are included in record recommendations.

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

If no recommendations appear, then you're already following all the recommended records.

SEE ALSO:

[Viewing Record Feeds](#)

Record Feed List View Limitations

Limitations for list views on record feeds.

Click  **Feed** on a standard or custom object list view to see a Chatter feed with updates from the records that are included in the list view. The feed shows updates from the last 30 days.

The following limitations apply to Chatter feeds on list views:

- Some feed-tracked objects don't have a Chatter feed associated with their list view. Currently, you can view Chatter feeds on list views for opportunities, accounts, cases, leads, campaigns, contacts, and custom objects.
- If drag-and-drop scheduling on list views is enabled, you don't see Chatter feeds on the list views for accounts, contacts, or leads.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

View Chatter Feeds on List Views

Switch to an object's Chatter feed directly from a list view to see updates for the records included in the list view.

If Chatter is enabled for your organization, Chatter feeds on list views are available for most feed-tracked objects in Salesforce Classic. Some feed-tracked objects don't have a Chatter feed associated with their list view. You can view Chatter feeds on list views for opportunities, accounts, cases, leads, campaigns, contacts, and custom objects.

- To see the feed on a standard or custom object list view, go to the view and click  **Feed**. For the records in this list view, the feed contains updates from the last 30 days.
If drag-and-drop scheduling on list views is enabled, you don't see Chatter feeds on the list views for accounts, contacts, or leads.
- Click **List** to display the list view again.

SEE ALSO:

[Viewing Record Feeds](#)

Follow Dashboards and Post Snapshots

Chatter lets you track updates to your feed-tracked dashboards and post dashboard snapshots. The snapshot posts help other users follow changes in the dashboard data.

[Follow Dashboards and Dashboard Components](#)

If feed tracking is enabled for dashboards, you can view updates and field changes in the Chatter feed.

[About Posting Snapshots to User and Group Feeds](#)

When you post a widget snapshot to a Chatter feed, consider who you want to share the widget with.

[Post Snapshots of Dashboard Widgets to Chatter](#)

Post a snapshot of a dashboard widget to a Chatter feed to help other users follow changes in the data.

EDITIONS

Available in: Salesforce Classic

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

Follow Dashboards and Dashboard Components

If feed tracking is enabled for dashboards, you can view updates and field changes in the Chatter feed.

Only unfiltered data is used to generate alerts.

If you don't see feeds, ask your administrator to enable feed tracking for dashboards.

1. To follow a dashboard, click **Follow**.

In Salesforce Classic, you follow all eligible components individually. You can choose to follow specific dashboard components.

In Lightning Experience, you follow the entire dashboard. If you want to follow a specific dashboard component, switch to Salesforce Classic.

2. To follow a specific dashboard component in Salesforce Classic, hover over a component to

display the  menu, and select **Follow this Component**.

To clear the hover menu, click an empty part of the screen.

To stop following a component, click  and select **Following**.

SEE ALSO:

[Viewing Record Feeds](#)

About Posting Snapshots to User and Group Feeds

When you post a widget snapshot to a Chatter feed, consider who you want to share the widget with.

In Salesforce Classic, widgets are called components.

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

Each snapshot has a Viewing As label, which is the name of the running user whose dashboard widget that you're viewing.

You can also post snapshots of filtered widgets (except Visualforce or s-control widgets). When viewers click the snapshot title in the feed, they're taken to your filtered view of the dashboard if the filters are still valid. If the filters aren't valid, they see the unfiltered dashboard.

To post a dashboard widget snapshot to a user or group feed in Lightning Experience, post the snapshot to the dashboard feed and mention a user or group.

If you don't see the option to post a snapshot, contact your administrator about enabling dashboard component snapshots.

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

- Posting to a user feed makes the snapshot public. Anyone who can view that user's profile can see it.
- Posting to a public group makes the snapshot public. Anyone who can view your profile or the group feed can see it.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, Group** (View Only), **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view dashboards:

- Run Reports AND access to the dashboard folder

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, Group** (View Only), **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view dashboards:

- Run Reports

- Posting to a private group shows the snapshot to all group members.

People can see it whether they have access to the dashboard. Make sure that the widget doesn't contain sensitive information.

Post Snapshots of Dashboard Widgets to Chatter

Post a snapshot of a dashboard widget to a Chatter feed to help other users follow changes in the data.

In Salesforce Classic, widgets are called components.

A snapshot is a static image of a dashboard widget at a specific point in time posted to a Chatter feed.

- Post a widget snapshot to its dashboard feed to share information with everyone following the dashboard. For example, post a snapshot of a regional sales chart to let your team know that sales are down in the Midwest.
- To spark comment or action from a user or group, post a widget snapshot in the user or group feed.

Each snapshot has a Viewing As label, which is the name of the running user whose dashboard widget you're viewing.

You can also post snapshots of filtered widgets (except Visualforce or s-control widgets). When viewers click the snapshot title in the feed, they're taken to your filtered view of the dashboard if the filters are still valid. If the filters aren't valid, they see the unfiltered dashboard.

If you don't see feeds, ask your administrator to enable feed tracking for dashboards.

1. In Salesforce Classic: To display the  menu, hover over a component. To clear the hover menu, click an empty part of the screen.

In Lightning Experience: Expand a widget by clicking , and then click .

2. In Salesforce Classic: Choose where you want your snapshot to appear.
 - To show it in a dashboard, click **Post Snapshot to Dashboard Feed**.
 - To show it to a user or group, click **Post Snapshot to User or Group Feed**.

In Lightning Experience: Compose a post. Mention people and groups, use rich text formatting, and scroll down to see past posts to the dashboard feed. In Lightning Experience, you always post to the dashboard feed.

3. Write a comment in the text box. In Salesforce Classic, click **OK**. In Lightning Experience, click **Share**. If you're posting a filtered widget, consider mentioning in your post that the widget is filtered.

The snapshot and comment immediately post to Chatter.

 **Note:** In Salesforce Classic, Snapshot images display in feeds for 4 months. After 4 months, only the comments remain.

In Lightning Experience, dashboard widget images shared on feeds behave like other images attached to a feed post, and aren't subject to a 4-month display window.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **Essentials, Group (View Only), Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view dashboards:

- Run Reports

Collaborate in Chatter Groups

Use public, private, or unlisted Chatter groups to collaborate with specific people in your company.

Chatter Groups

If you're working on a team, you can create a group for your team to share mission-related files and information. Share information through the group feed.

Unlisted Groups

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

Seen-By Information in Private and Unlisted Groups

Posts in private and unlisted Chatter groups have a seen-by count that shows the number of people who have seen a post. Click the count to see the names of people who have seen the post.

Broadcast Groups

Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can post to the group. Group members can read posts and comment on them.

Filter Group Feeds

In Lightning Experience, many filtering options are available in group feeds to help you get to information quickly.

Group List Page

The Groups page displays a list of the Chatter groups in your company.

Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group. Leave the groups that are no longer relevant to you.

Group Limitations in Mobile App

There are limitations when you use the Groups feature in the Salesforce mobile app.

Create and Manage Chatter Groups

Create a group for your team or a project. Add members, and update group settings.

Work in Chatter Groups

To make the best use of your groups, it helps to understand the information they offer and different ways to interact with them.

Records in Chatter Groups

You can interact with your records through your Chatter groups. For example, you can create records and add and remove them from a group

Chatter Groups

If you're working on a team, you can create a group for your team to share mission-related files and information. Share information through the group feed.

You can join up to 300 groups, and your company can have a total of 30,000 groups. Chatter groups can be public, private, unlisted, and archived.

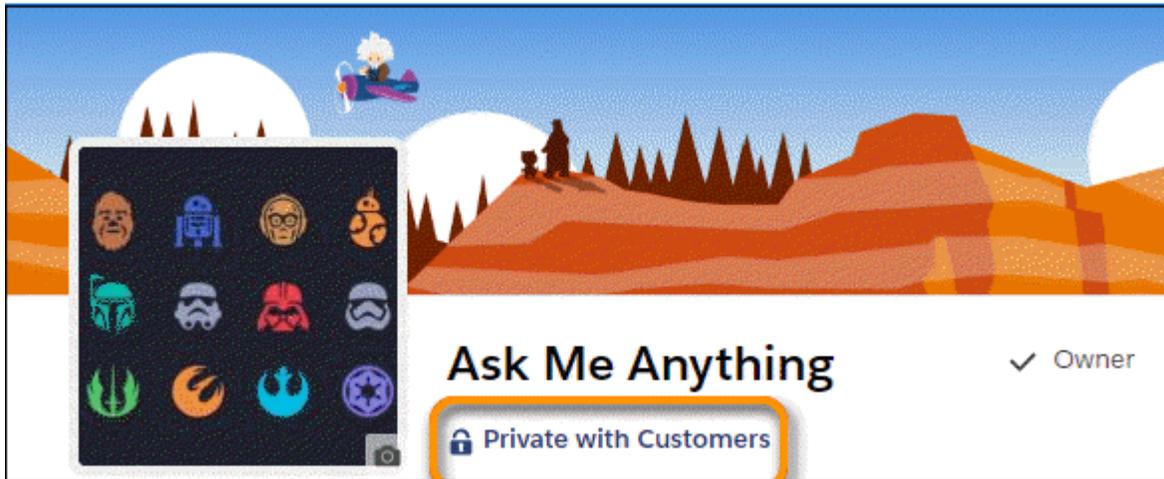
- **Public:** Anyone can see and add posts, comments, and files. Anyone can join a public group.
- **Private:** Only group members can see and add posts, comments, and files. All Experience Cloud site users can see the group picture, name, description, and members. If you want complete privacy, make the group Unlisted. People must ask the group's [owner or managers](#) to join the group. Users with the "Modify All Data" and "View All Data" permission can see group posts, updates, and files across the organization. Users with the "Manage All Data" permission can also join private groups directly and change group settings.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

- **Unlisted:** Only group members and users with the “Manage Unlisted Groups” permission can see and add posts, comments, and files. People can’t ask to join the group. The group’s owner or managers must invite the group members. Unlisted groups offer [more privacy](#) and nonmembers can’t see or access unlisted groups in list views, feeds, or search results.
- **Groups with Customers:** Private and unlisted groups can allow customers. You can identify groups with customers in Salesforce Classic by the orange upper left corner of the group photo. You can identify groups with customers in Lightning Experience by a caption in the group header.



- **Archived:** Some groups can be archived. When a group is archived, people can no longer create posts but previous posts are retained for reference.
- **Note:** In Lightning Experience, group feeds are live. Posts appear the moment they’re published so they don’t require a page refresh to update. Live group feeds are new in Lightning Experience, so they have lots of potential for enhancement and a few known issues.
 - Content posted to the group is live, but mentions aren’t. If you post to group A, the post is live. If you mention group A in another feed, group A requires a page refresh to show that mention.
 - When a group has a new post, you receive notifications only in Lightning Experience.
 - When people add comments to a post that you’re engaged in, you’re notified only in Lightning Experience. And you’re notified only when you’re actively entering comments or you’ve clicked in the comments box.
 - The number of participants supported in a live feed depends on your org’s subscription limits. If you’re not getting a live group feed or live comments, refresh the page or click in a comments field. If the feed still isn’t live, your org has likely hit its limit. You can still get updates the old-fashioned way by refreshing the page.
 - If you’re in a group feed that doesn’t seem live anymore, it’s a known issue that we’re working on (Safe Harbor).
- **Note:** In Salesforce Classic, you can use the Collaboration Group Engagement report to monitor your group’s activity, such as members, posts, comments, and likes. If you use the report, you must add a group ID to see the number of post comments and likes. If you leave the Group ID field blank, the report doesn’t calculate those fields. The Group ID field is not available in Lightning Experience.

SEE ALSO:

[What Your Chatter Group Role Lets You Do](#)

[Chatter Customers in Private Groups](#)

[Live Feeds](#)

Unlisted Groups

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

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

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

Limitations

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

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

Seen-By Information in Private and Unlisted Groups

Posts in private and unlisted Chatter groups have a seen-by count that shows the number of people who have seen a post. Click the count to see the names of people who have seen the post.

 **Note:** Seen-by information isn't available in Experience Cloud sites.

EDITIONS

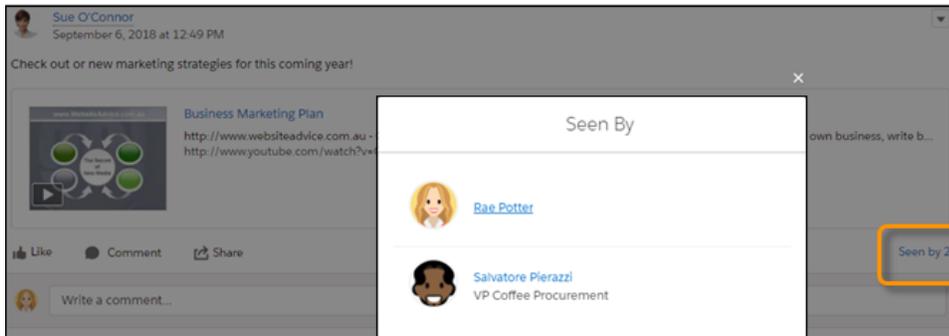
Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: Lightning Experience

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

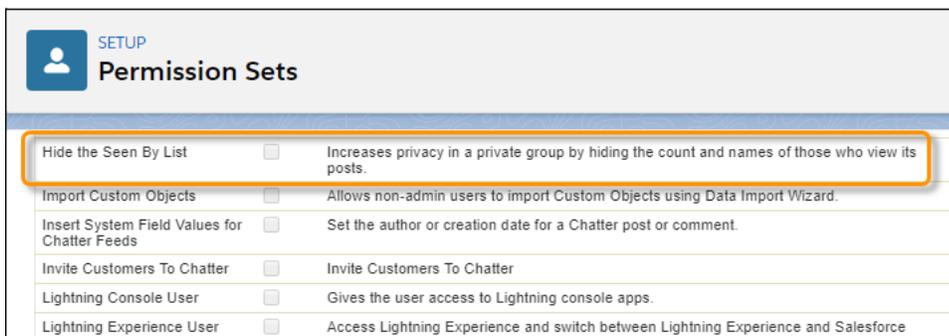


What counts as being seen? Liking, commenting, editing, and viewing in detail. An item is also considered seen when a user has it in view on the screen or when they scroll past it. Taking all of these actions into account can mean that the seen-by count is greater than the view count.

The person who posted the item isn't included on the item's Seen by list. When no one has liked, commented on, edited, or visited the item detail view, the view count is shown instead of the Seen by count.

The actions that you take in Salesforce Classic are tracked and counted, but only Lightning Experience shows the seen-by count and list.

A user permission, Hide the Seen By List, is available to disable this feature for selected users. Admins can use this permission to control who sees the count and the list.



Note:

- With a couple of exceptions, only people with access to a private or unlisted group can see seen-by information. Users with Modify All Data or View All Data permission can almost always see seen-by information in all feeds. Such users can also get the information using API calls. That is, their access is the same as with any feed item.
- If **Hide the Seen By List** is enabled for a user with Modify All Data or View All Data, that user doesn't see seen-by information.
- When a private group is at-mentioned in a public group, group members can access the seen-by information from the feed item.
- Seen-by information isn't available in any reports.
- When seen-by information isn't available, view count is displayed instead.

SEE ALSO:

[Characteristics of Chatter Counts](#)

[Seen-By Information in Private and Unlisted Groups](#)

Broadcast Groups

Broadcast groups are a special type of public, private, or unlisted group where only group owners and managers can post to the group. Group members can read posts and comment on them.

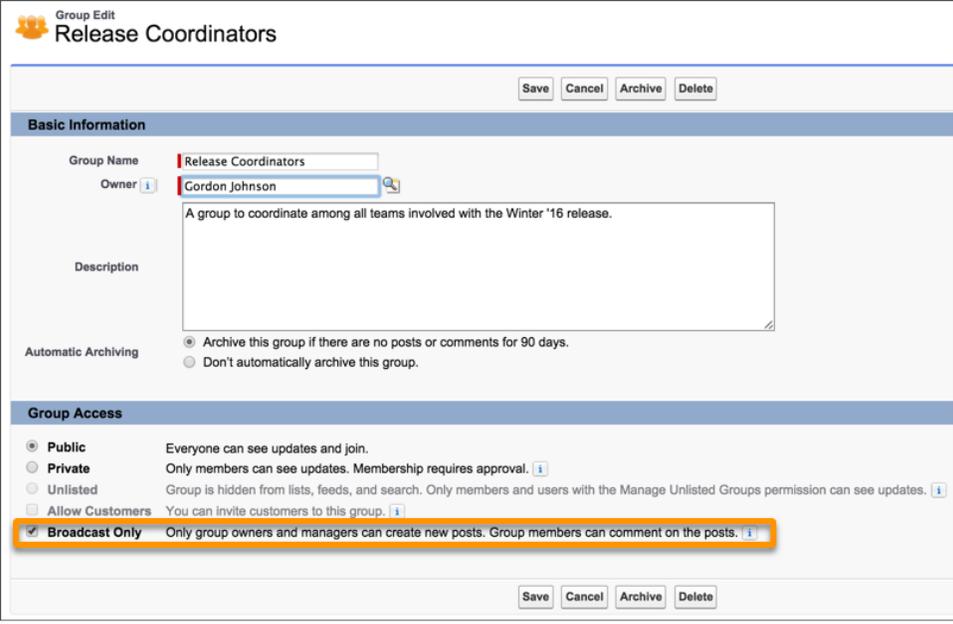
By restricting the ability to post, group owners and managers can keep group discussions focused and relevant by cutting down noise. You can configure public, private, and unlisted groups to be broadcast groups.

To set a group to broadcast mode, select **Broadcast Only** in the group settings.

 **Example:** Creating broadcast groups are ideal when a limited and consistent set of individuals must regularly communicate with a large group of people. Some examples include:

- Organization-wide updates from the executive leadership in the company
- Policy changes from your company's HR department
- Event updates from the organizer of large events or company conferences
- Important action alerts from key IT personnel, including their awesome Salesforce administrator

Broadcast group setting in Salesforce Classic.



The screenshot shows the 'Group Edit' interface for a group named 'Release Coordinators'. The 'Basic Information' section includes fields for 'Group Name' (Release Coordinators), 'Owner' (Gordon Johnson), and a 'Description' (A group to coordinate among all teams involved with the Winter '16 release.). The 'Automatic Archiving' section has two radio buttons: 'Archive this group if there are no posts or comments for 90 days.' (selected) and 'Don't automatically archive this group.'. The 'Group Access' section lists four options: 'Public' (selected), 'Private', 'Unlisted', and 'Allow Customers'. The 'Broadcast Only' option is highlighted with an orange box and is checked, with the description 'Only group owners and managers can create new posts. Group members can comment on the posts.'

Broadcast group setting in Lightning Experience.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Group Details

Name *

Description

Information

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☰ ☰ ☰
⚙️ ⚙️

[2015 Ad Campaign Budget Allocations](#)
[Q4 Campaign Statuses](#)

For Marketing recruitment, see the [MKTG Recruits 15](#) group.

Owner *

Disable Automatic Archiving

Access Type *

Allow Customers

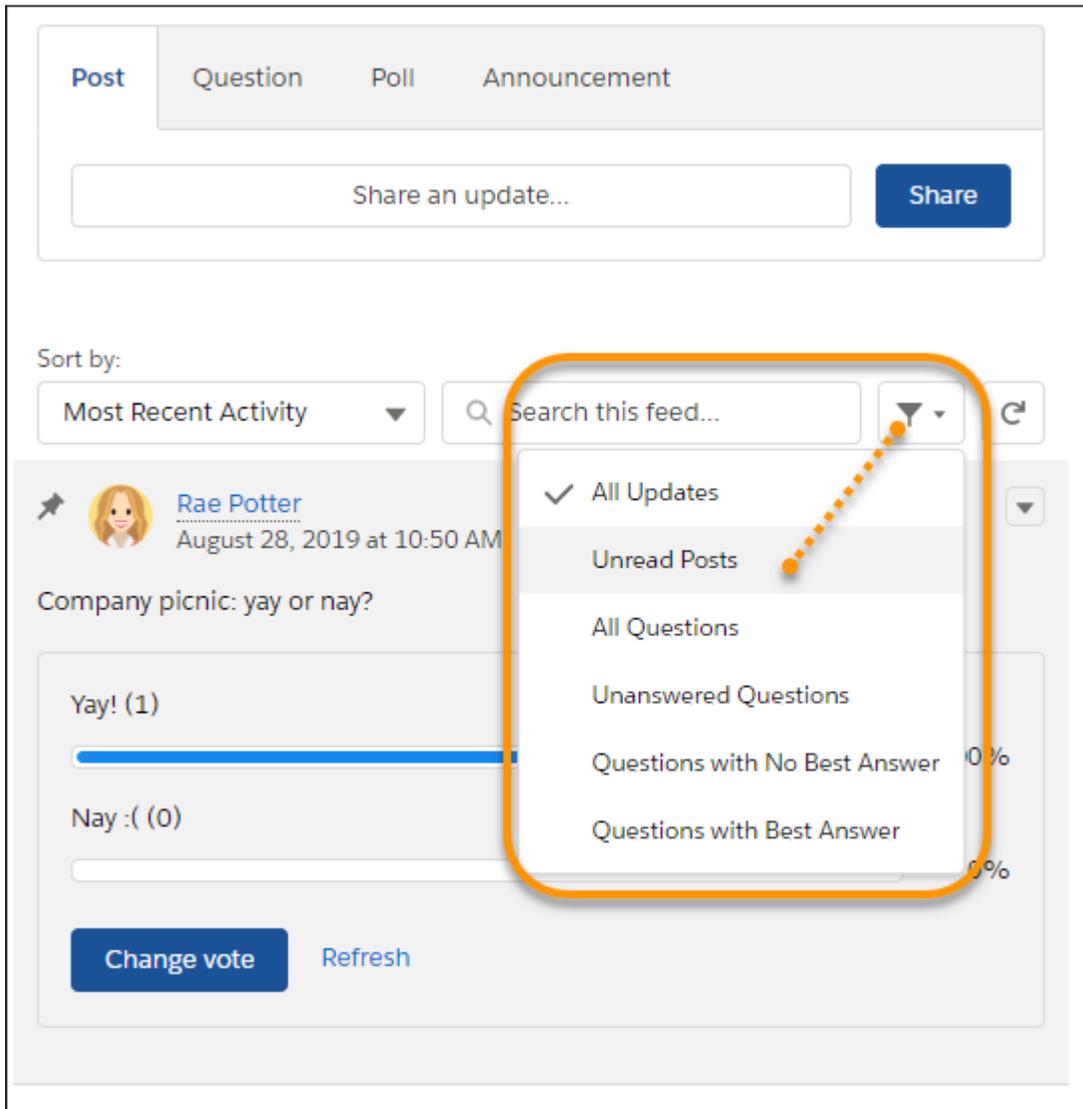
Broadcast Only

Filter Group Feeds

In Lightning Experience, many filtering options are available in group feeds to help you get to information quickly.

EDITIONS

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



Here are the filters you find in group feeds:

- **All Updates**—Shows all content in the feed.
- **Unread Posts**—Limits the feed to the posts that you haven't read. To see this filter, you must be a member of the group. A post is considered read when you've liked it, commented on it, edited it, scrolled by it, or viewed it in detail.
- **All Questions**—Limits the feed to all questions posted through the question publisher.
- **Unanswered Questions**—Limits the feed to all questions posted through the question publisher that don't have an answer.
- **Questions with No Best Answer**—Limits the feed to all questions posted through the question publisher where a Best Answer hasn't been selected.
- **Questions with Best Answer**—Limits the feed to all questions posted through the question publisher where a Best Answer is selected.

Group List Page

The Groups page displays a list of the Chatter groups in your company.

Click **Groups** on the sidebar of the Chatter page to display a list of the Chatter groups in your company. On the Groups page, you can

Create a group

To open a New Group dialog and create your group, click **New Group**.

Filter and sort the groups list

Use the following filters to filter your groups.

- **Recently Viewed** and **Recently Viewed Groups** show the groups that you recently looked at, starting with the group you viewed last
- **My Groups** shows the groups that you belong to, own, or manage
- **Active Groups** shows the active groups in your company
- **My Archived Groups** shows the archived groups that you belong to, own, or manage.



Note: In Lightning Experience, click the pin view icon  to pin a selected list view. The pinned view becomes your default view until you unpin it.

To sort the list, click a column header.

- The **Group** column sorts by group name.
- The **Last Activity** column sorts by the date of the last post or comment on a group.
- The **Membership** column sorts based on your membership status.

Search for a group

Search for groups by entering two or more letters of a group name or description in the **Find Groups** box. The list automatically filters based on what you type.

View a group

To view a group, click its name. You can view all groups, but you see only updates and files for public groups and private groups that you belong to. Groups that [allow customers](#) display the parenthetical (With Customers).

Join a public group or ask to join a private group

To join a public group, click **Join**. For private groups, click **Ask to Join** to send a request to join to the group's owner and managers. Users with the Modify All Data permission can directly join private groups; so they see **Join** for private groups.

Leave a group or withdraw a request for membership

To leave a group or to withdraw a request to join a group, click .

View the group owner's profile

To see a group owner's [profile](#), Click the group owner's name.

Get a group recommendation

View the groups that Chatter recommends that you join in the Recommendations section. Recommendations are based on a group's popularity and the number of people that you follow who are in the group. To see the full list of recommendations, click **More**. If you don't see recommendations, then you already belong to all the recommended groups.

SEE ALSO:

[Group Files Lists](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group. Leave the groups that are no longer relevant to you.

1. Go to group's detail page.
2. To join a public group, click **Join** or **Join Group**. To join a private group, click **Ask to Join**. Your request is sent to the private group's owner and managers, who accept or decline your request.

You can join up to 300 groups and your org can have up to 30,000 groups. Archived groups count toward your org's group limits (30,000) but not toward a user's group membership limits (300).

To leave a group that you joined or to withdraw your request to join a private group, go to the group detail page and click  or **Leave Group**. If you don't see these options, ask your Salesforce admin to adjust the page layout.

Group Limitations in Mobile App

There are limitations when you use the Groups feature in the Salesforce mobile app.

When using groups in the Salesforce mobile app, you can't:

- See live feed updates.
- Invite customers to join private customer groups.
- Add records to Chatter groups with customers using the **Add Record** action.
- Withdraw requests for joining private groups.
- Change email and in-app notification settings for groups in Experience Cloud sites.
- See or customize group member engagement data.
- Share files with a group unless you're a member or admin (iOS only)

Group owners and managers can't remove files from the group files list.

Create and Manage Chatter Groups

Create a group for your team or a project. Add members, and update group settings.

[Create Chatter Groups](#)

Create public, private, and unlisted Chatter groups to collaborate with your teams and work together on projects.

[Change the Owner of a Group](#)

To change a group's owner, edit group settings. Only the current group owner and people with the Modify All Data permission can change the owner.

[Customize Groups](#)

Use record types to create group types with the layout and branding that you want. Then you can create custom groups.

[Change the Access Level of a Group](#)

Edit a group's settings to change its access level. For example, you open up an unlisted group to a wider audience by converting it to a private or public group. You can edit the settings for Chatter groups that you own or manage.

[Add and Remove Chatter Group Members](#)

Own or manage a Chatter group? Here's how you add or remove group members.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in **Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager** editions.

Accept or Decline Private Group Requests

As the owner or manager of a private Chatter group, you can accept or decline requests to join the group.

What Your Chatter Group Role Lets You Do

The actions that you can perform in a Chatter group depend on whether you're a member, owner, or manager of the group.

Archived Chatter Groups

When a Chatter group is archived, group members can't post content or share files with the group. Previous posts, comments, and files remain available.

Delete Chatter Groups

Deleting a group permanently deletes all group updates, including feed posts and any links that were posted to the group. To delete a group, you must be the group owner or a user with the Modify All Data permission. Group managers can't delete a group.

Create Chatter Groups

Create public, private, and unlisted Chatter groups to collaborate with your teams and work together on projects.

-  **Note:** If you want to prevent some users from creating groups, you can do so by editing the user's assigned profile. The permission "Create and Own New Chatter Groups" controls a user's ability to create groups (public, private, or unlisted). The permission is enabled by default, but administrators can disable it on select user profiles. After an administrator disables this permission, a user with the affected profile can no longer create or be assigned as owner of new Chatter groups.

If the user was already the owner of any groups, that ownership is not revoked.

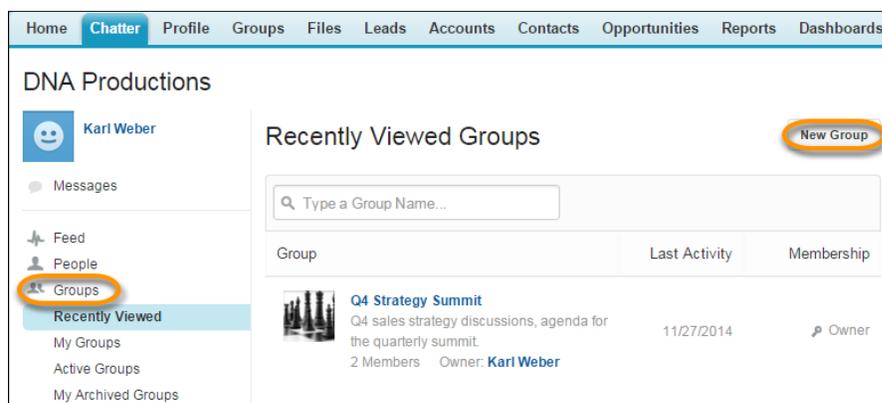
1. Click the Groups tab.

If you don't see the Groups tab, open the App Launcher, search for *groups*, and click your result.

2. On the Groups list page, click **New Group**, and enter a group name and description.

-  **Note:** Group names must be unique across public and private groups. Unlisted groups don't require unique names.

In Experience Cloud sites, both public and private group names must be unique within the



3. Select an access level for your group.

EDITIONS

Available in: both Salesforce Classic (**not available in all orgs**) and Lightning Experience

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

USER PERMISSIONS

- To create groups
- Create and Own New Chatter Groups

- **Public**—Anyone can see and add posts, comments, and files. Anyone can join.
- **Private**—Only group members can see and add posts, comments, and files. People must ask to join, and the group's **owner or managers** must add them. Users with the “Modify All Data” and “View All Data” permission can see group posts, updates, and files across the organization. Users with the “Manage All Data” permission can also join private groups directly and change group settings.
- **Unlisted**—Only group members and users with the “Manage Unlisted Groups” permission can see and add posts, comments, and files. People can't ask to join. The group's owner or managers must invite them. Unlisted groups offer **more privacy**. Nonmembers can't see or access unlisted groups in list views, feeds, and in search results. Unlisted groups aren't available by default; your administrator must enable them for your organization.

To allow customers to join a private or unlisted group, select **Allow Customers**. In Salesforce Classic, you can identify groups with customers by the orange upper left corner of the group photo. In Lightning Experience, you can identify groups that allow customers by a caption on the group page's banner. If you allow customers in a group, you can't change the group access level later.

If your Salesforce admin has enabled group archiving, you can change the automatic archiving settings for the group. Disable automatic archiving only if a group must remain active always, despite extended periods of inactivity.

4. Save your changes.



Note: You **own** the groups that you create. To assign a new owner, finish creating the group, then [edit the group settings](#).

Change the Owner of a Group

To change a group's owner, edit group settings. Only the current group owner and people with the Modify All Data permission can change the owner.

1. In Salesforce Classic, go to the group detail page and click **Group Settings**. In Lightning Experience, go to the header on the group detail page and click **Edit Group**.
2. Choose the owner from existing members. In the **Owner** field, enter a name or click the look-up icon to search group members.
3. Save your changes.

SEE ALSO:

[Add and Remove Chatter Group Members](#)

EDITIONS

Available in: both Salesforce Classic (**not available in all orgs**) and Lightning Experience

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

USER PERMISSIONS

To edit public or private Chatter groups:

- Group owner or group manager role
- OR
- Modify All Data to edit public and private groups
- OR
- Manage Unlisted Groups to edit unlisted groups

Customize Groups

Use record types to create group types with the layout and branding that you want. Then you can create custom groups.

Creating a group record type creates a group type that users can choose when they create Chatter groups.

1. From Setup, enter *Groups* in the Quick Find box, then select **Record Type**.
2. Click **New**.
3. Choose an existing record type as the basis for the new group type.
4. Enter a label and the name of the new record type.
The label appears when users select a group type. The name is the unique API name.
5. Enter a description, which is visible to users.
6. To activate the record type, select **Active**.
7. To make the record type available to users with a particular profile, select **Make Available** next to that profile. To enable it for the group type for all profiles, select the checkbox in the header row.
8. Click **Next**.
9. Choose a page layout option for records of this type.
10. Save the record type.

EDITIONS

Available in: **Lightning Experience**

USER PERMISSIONS

To create record types for groups:

- "Create and Edit Record Types for Groups"

Change the Access Level of a Group

Edit a group's settings to change its access level. For example, you open up an unlisted group to a wider audience by converting it to a private or public group. You can edit the settings for Chatter groups that you own or manage.

As a group owner or manager, you can change groups from private to public, or from public to private by [editing the group settings](#).

When you change a private group to public, a few things happen:

- Updates and files are visible to all users.
- All pending requests to join the group are accepted.
- Anyone can join the group.

Private groups with customers can't be converted to other group types. You can't change the group access level for private groups that allow customers.

1. In Salesforce Classic, click **Group Settings** on the group detail page. In the Lightning Experience, click the **Edit Group** button in the group header.
2. Change the access level for the group.
3. Save your changes.

Add and Remove Chatter Group Members

Own or manage a Chatter group? Here's how you add or remove group members.

1. In Salesforce Classic, go to the group's detail page, and click **Add/Remove Members**. In Lightning Experience, go to the group highlights panel, and click **Add Member** (your administrator must add this quick action).
2. To filter the list of users, start entering the name of the user you want to add or remove.
3. To add a member, click **Add**; to remove a member, click **X**. For people who have requested to join, click **Accept** to accept the request, or **X** to decline.
4. When you're finished, click **Done**.

SEE ALSO:

[View Chatter Group Members](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To edit public or private Chatter groups:

- Group owner or group manager role
- OR
- Modify All Data to edit public and private groups
- OR
- Manage Unlisted Groups to edit unlisted groups

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Accept or Decline Private Group Requests

As the owner or manager of a private Chatter group, you can accept or decline requests to join the group.

1. On a group detail page, click **Request**.

You can also click the link in the email request.

2. Accept or decline the requests.

Salesforce sends an email to each person to inform them that their request was accepted or declined.

If you make a private group public, any pending requests are automatically accepted.

What Your Chatter Group Role Lets You Do

The actions that you can perform in a Chatter group depend on whether you're a member, owner, or manager of the group.

This table describes the actions that are available to members, managers, and owners of public and private Chatter groups. [Customers](#) can be group members and managers, but not owners.

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

- To create groups
- Create and Own New Chatter Groups

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

In unlisted groups:

- Users with the Manage Unlisted Groups permission can perform all of these actions in unlisted groups, even if they aren't members.
- Users with the Modify All Data or View All Data permission can find and access unlisted groups only if they are members. Unlike public and private groups, users with the Modify All Data permission can't perform group owner actions in unlisted groups. If the Modify All Data user has the group manager role in the unlisted group, then they can perform group manager actions.

Change Chatter Group Roles

In Salesforce Classic, you can change group roles for the groups that you own or manage.

Change Chatter Group Roles

In Salesforce Classic, you can change group roles for the groups that you own or manage.

 **Note:** When the owner of a Chatter group is deactivated, the deactivated user still owns the group. But a user with the Modify All Data permission can assign a new owner for a public or private group. For unlisted groups, a user with the Manage Unlisted Groups permission can assign a new owner.

1. On the group's detail page, click **Change Roles**.
2. To search for members, start entering a name in the search box.
You can sort the list between **Managers** and **All Members**
3. Select the **Manager** checkbox for the people that you want to be managers.

Customers who are group managers can see people who ask to join the group, even if they aren't in other common groups. They can also approve requests.

To [change the group owner](#), you must own the group or have the right permission. Anyone with the Modify All Data permission can change the owner in public and private groups. Anyone with the Manage Unlisted Groups permission can change the owner for unlisted groups. To assign a new owner, click the **Group Settings** link next to the current owner.

4. Click **Done**

Archived Chatter Groups

When a Chatter group is archived, group members can't post content or share files with the group. Previous posts, comments, and files remain available.

In an archived group, users can still comment on existing posts, mention people, and search the feed. Users can also join and leave archived groups, create reports that include archived groups, and use global search to find archived groups and their content. Group owners and group managers can [archive](#) groups, [reactivate](#) them, and [enable and disable automatic archiving](#) at any time. Users with the "Modify All Data" permission can perform these actions on the public and private groups in their organization. Users with the "Manage Unlisted Groups" permission can perform these actions on unlisted groups.

Archived groups help users focus on the active groups in your organization:

- Archived groups don't count toward a user's group membership limits.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- Unless someone adds a comment, posts from archived groups don't appear in Chatter feeds. Posts with new comments appear in the All Company (Salesforce Classic) feed. They appear in the Company Highlights (Lightning Experience) feed, provided they rank highly in popularity or degree of engagement (their comments, likes, and views). In an archived feed, posts with new comments also appear in the What I Follow feed of each group member.
- File and feed sharing is limited to active groups only, making group searches more efficient.
- Archived groups appear only on the My Archived Groups list and not on the Active Groups list.



Example: Group archiving is useful for groups that have little or no feed activity, but contain useful information that you want to retain. For example:

- A group that a sales team created while pursuing a deal. Though there probably isn't much group activity after lead conversion, the sales team can still access important information about the customer.
- A group that is used for planning a company event. It can be archived after the event, but revisited for historical vendor information and planning discussions.
- A service desk type group that is used to track key issues for a major deployment for a customer. Archiving it after deployment issues are resolved still gives support agents access to relevant information for future troubleshooting.
- When a new group replaces a legacy group with the same or broader purpose, the legacy group can be archived. Then you can redirect traffic to the new group.
- Team groups can be archived when a team changes or team members leave the company. Team discussions are preserved for future reference.

Turning off automatic archiving is useful for groups that contain important information but aren't updated regularly. Think of a group that is used for company-wide announcements. When automatic archiving is turned off, groups without activity for more than 90 days don't get archived, and users don't miss any important posts.

Archive Chatter Groups

Archive a group manually, or edit automatic archiving settings.

Activate Archived Chatter Groups

Group owners, group managers, and users with the "Modify All Data" permission can activate an archived Chatter group from the group detail page.

Archive Chatter Groups

Archive a group manually, or edit automatic archiving settings.

Salesforce runs a weekly review of feed activity in groups. If a group has no new feed posts or comments for 90 consecutive days, the group is archived automatically. Mentioning a group doesn't count as feed activity and doesn't delay group archiving. Group owners, group managers, and users with the "Modify All Data" permission can manually archive or edit automatic archiving settings for groups at any time.

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

After you archive a group:

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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

Use the **My Archived Groups** filter in the Groups list to find the archived groups that you own, manage, or belong to. You can also use global search to find archived groups or associated content. Archived groups don't count toward your group membership limit.

 **Note:**

- Group members don't receive email notifications when a Chatter group they own, manage, or belong to is archived or activated.
- If your administrator disables archiving for groups, you can't archive groups or edit automatic archiving settings. You can reactivate archived groups at any time, even if archiving has been disabled.

SEE ALSO:

[Archived Chatter Groups](#)

[Activate Archived Chatter Groups](#)

Activate Archived Chatter Groups

Group owners, group managers, and users with the "Modify All Data" permission can activate an archived Chatter group from the group detail page.

1. Navigate to the archived group that you want to activate.
 - To find the archived groups that you own, manage, or belong to, use the **My Archived Groups** filter on the Groups list view.
 - To find other archived groups, use global search, run a report, or ask your administrator for help.
2. On the group detail page, click **Activate**.
You can also activate an archived group from the group settings page.

After an archived group is reactivated, the group detail page displays. The Chatter publisher is enabled so members can create posts and share files with the group.

 **Note:**

- Group members don't receive email notifications when a Chatter group they own, manage, or belong to is archived or activated.
- You can activate only one group at a time. To activate multiple groups at once, use the Salesforce API.

SEE ALSO:

[Archived Chatter Groups](#)

[Archive Chatter Groups](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Delete Chatter Groups

Deleting a group permanently deletes all group updates, including feed posts and any links that were posted to the group. To delete a group, you must be the group owner or a user with the Modify All Data permission. Group managers can't delete a group.

 **Tip:** To retain group data for future reference, [archive groups](#) instead of deleting them.

In Lightning Experience, delete a group by clicking **Delete Group** from the buttons in the group highlights panel.

In Salesforce Classic:

1. On a group detail page, click **Group Settings**.
2. Click **Delete**.
3. Click **OK**.

When you delete a group that includes files, you're not deleting the files, just references to them.

The files remain in their original location. For example, you can see the files that you own by applying the **Owned by Me** filter on Files home. If files were posted to the group and not shared in other locations, deleting the group also removes the references to the files. The files remain in the file owner's **Owned by Me** filter on Files home, where the files are private but can be shared again later.

SEE ALSO:

[Archive Chatter Groups](#)

[View Where a File Is Shared](#)

Work in Chatter Groups

To make the best use of your groups, it helps to understand the information they offer and different ways to interact with them.

[Get Familiar with Your Chatter Group](#)

To see group updates, files, and members, click a group's name in a feed, in the Groups list, or on someone's profile.

[View Chatter Group Memberships](#)

In Salesforce Classic, the Groups list on your profile shows you the Chatter groups that you belong to.

[View Chatter Group Members](#)

The Members section on a Chatter group page shows all members of a group, including any customer members.

[Chatter Group Recommendations](#)

Chatter recommends groups for you to consider joining.

[Use Email to Post to Chatter Groups](#)

In Salesforce Classic, email posts to the Chatter groups that you have access to.

[Post an Announcement to a Chatter Group](#)

Post group announcements to highlight important messages on the group page.

[Group Files Lists](#)

In Salesforce Classic, the Group Files list shows a group's recently posted files.

EDITIONS

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Get Familiar with Your Chatter Group

To see group updates, files, and members, click a group's name in a feed, in the Groups list, or on someone's profile.

The amount of detail that you see and the kinds of things you can do on a group's page depends on a few things. The group type; your membership, your ownership or management of the group, and your group role all affect what you can do.

Non-Members of Public Groups

If you're viewing the group detail page of a public group that you're not a member of, you can:

Post and comment

Post an update or add a comment, and click **Share**.

Join the group

To join the group, click **Join**.

View group description and information

The group description and information appear in a separate column next to the feed.

View the group's members

The Group Members section shows the group's current members, including external customers who are members of the group.

View, download, and search files posted to the group

Files posted to the group feed or shared with the group appear in the Group Files section.

View the topics the group is talking about

The group's topics appear under posts in the group feed.

Search for group information

To search for information in the group, click  above the feed.

Non-Members of Private Groups

If you're viewing the group detail page of a private group that you're not a member of, you can only:

Ask to join the group

To request to join a group, click **Ask to Join**. This action sends an email to the owner and managers of the private group.

View the group's picture and description

The group description appears below the group photo.

View the group's members

The Group Members section shows the group's current members, including any external customers who are members of the group.

Nonmembers of Unlisted Groups

If you're not a member of an unlisted group, you can't view the group detail page.

Group Members of Public, Private, and Unlisted Groups

When you're a member of a public, private, or unlisted group, you can also:

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Change Your Email Settings and In-App Notifications for the Salesforce Mobile App

In Salesforce Classic, click **Email Me...** to set up email about activity in the group, either whenever someone posts, daily, or weekly. Selecting **Every Post** also turns on in-app notifications for groups in the Salesforce mobile app. To stop receiving email and mobile notifications for the group's activity, click **Turn Off Group Email**. To modify all your Chatter email settings, click **Email Settings**.

In Lightning Experience, click **Email Notifications** from the group highlights panel to modify your group email settings.

 **Note:** Group updates appear in your in-app notifications. When someone creates a group post, you see the individual user's picture and post. When you select the picture, you jump to the user's profile page. If multiple users create posts in a short amount of time, you see the group picture. When you select the picture, you jump to the group page.

Invite People

If your administrator has enabled invitations, click **Invite People** to [invite people](#) to join the group. For private groups, only the group manager, group owner, or users with the Modify All Data permission can invite people. For unlisted groups, only the group manager, group owner, or users with the Manage Unlisted Groups permission can invite people.

Leave the group

To leave a group, or withdraw a request to join a private group, click . To leave a group that you own, you must first [assign a new owner](#).

Group Owners and Group Managers

When you're the owner or manager of a public, private, or unlisted group, you can also:

[Add or remove group members](#)

[Change the group photo](#)

[Edit group settings](#)

[Edit the Information section](#)

To add information for the group's members, click **Add Information** or  in the Information section. You can customize this section, including its title.

[Edit the Description section](#)

To add a description of the group, click **Add Description** or  in the Description section.

[Change member roles](#)

[Accept or decline requests for private groups](#)

SEE ALSO:

[Group Files Lists](#)

View Chatter Group Memberships

In Salesforce Classic, the Groups list on your profile shows you the Chatter groups that you belong to.

By default, the list is sorted by the most recent activity date. On the Groups tab, you can join or create groups. You can also view the Groups list on other people's profiles to see their group memberships. On other people's profiles, you can see unlisted group memberships only if you're also a member of the unlisted group.

- To view the full list in alphabetical order, click **Show All**.
- To see more of the list, use the **Next** and **Previous** links.
- To leave a group or withdraw a request to join, click **x**.
- To join a public group on another person's groups list, click **Join**.
- To send a request to join a private group on another person's groups list, click **Ask to Join**.

SEE ALSO:

[What Your Chatter Group Role Lets You Do](#)

View Chatter Group Members

The Members section on a Chatter group page shows all members of a group, including any customer members.

1. To view the full group member list in alphabetical order, click **Show All** in the Members section.

In the Members window, you can:

- Filter the list to see all members, managers, or the owner
- Use the **Next** and **Previous** links to see more of the list
- Search using the `Find Members` search box
- To start or stop following someone, click **Follow** or **x** next to their name.

You can't follow customers.

2. To close the window, click **Done**.

Chatter Group Recommendations

Chatter recommends groups for you to consider joining.

We base our recommendations on:

- The popularity of the group determined by the number of members
- The number of people that you're following in the group (Chatter recommends groups with the most members that you're following.)
- If the group is new (created in the last month)

To see an expanded list of your recommendations, click **More** in the Recommendations section. If no recommendations appear, then you already belong to all the recommended groups. Mouse over the recommendations and click **x** to dismiss them. They don't appear again.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Use Email to Post to Chatter Groups

In Salesforce Classic, email posts to the Chatter groups that you have access to.

If your admin has enabled this feature, you can email your posts to any public group. Your admin can also let you include attachments. You can email posts to a private or unlisted group only if you're a member. Use the email address associated with your Salesforce user account.

1. To launch a blank email to the group using your local email client, go to the group detail page, and click **Post by email** below the group description.
2. Enter your message in the email body, including attachments if needed, and send the email. Attachments to the email are added as files in Chatter and shared with the group.

The email content displays as a post on the group detail page. Any hashtags that you include in the email body (for example, #TeamExcellence) are converted to topics on the post. If you include more than one attachment, the first attachment is added as part of the post and other attachments are added in comments.

 **Tip:** Save the group's email address as a contact in your mail client or mobile device for easy access in the future. If you copy and paste the mailto: link directly into the contact's email field, some mail clients can consider the link invalid and prevent you from sending email to the contact. Try removing the parenthetical group name from the first part of the email address. For example, remove (My Group) from (My Group) 0f9b00000004cmkaq@post.k-pxyvmac.kp0.chatter.salesforce.com.

The following limitations apply to posting to a group using email:

- The 10,000 character limit for Chatter posts also applies to posts created through email. Any text in your email beyond this limit is not included in the post.
- The maximum message size is 25 MB, including text and attachments.
- The email subject is not included in the post.
- You can create text posts using email and include links in the text. You can also include up to 25 attachments. You can't mention people, create polls, or give titles to links when posting to the group by email.
- Character-level formatting, such as the use of bold or different type sizes, is not supported.
- Email addresses must be unique at the group level. Imagine that multiple user profiles in your organization use the same email address. If that address is used to post to a group, then the user profile associated with the group is used on the post. If the email address is shared between multiple user profiles in the same group, the email is blocked.
- Signature text is treated as part of your post. Default signatures inserted by mobile devices, such as *Sent from my iPhone*, are automatically removed. Before sending your email, delete custom signatures and any extra text that you don't want posted to Chatter. Or, add a separator line to the top of your signature to have it automatically removed. The separator line must have a minimum of one of the following characters:
 - Dash (–)
 - Equal sign (=)
 - Underscore (_)

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Post an Announcement to a Chatter Group

Post group announcements to highlight important messages on the group page.

 **Note:** By default, groups use the global publisher layout. If the Announcement action doesn't appear in groups, ask your administrator to override the global publisher layout. Then have them add the Announcement action to a custom group publisher layout.

Only group owners, group managers, and users with the "Modify All Data" permission can post and delete group announcements.

1. On the group page, click **Announcement** in the publisher.
2. Enter your announcement. The character limit is 5,000, and you can include links or mention users and groups. Because of space constraints, approximately 137 characters of the announcement appears on the group page. Users can click **More** to see the rest of the message.
3. Specify an expiration date for the announcement.
4. Click **Share**.

A group announcement appears until 11:59 p.m. on the selected expiration date, unless a new group announcement replaces it. In the group feed, users can discuss, like, and post comments on announcements. When you post an announcement, group members receive an email notification, just like they do for other posts, depending on their notification settings.

Deleting the feed post deletes the announcement. From Salesforce Classic, you can remove the announcement from the group page without deleting the feed post. Click  in the top corner of the announcement, and then select the option to dismiss the banner.

 **Note:** Rich text is not currently supported in Chatter Announcements. Even if the user edits the related feed post to add rich text, the new edits aren't applied to the announcement card.

Send Email Notifications for Announcements

For group announcements, group owners and managers can send email notifications to all group members, despite the members' notification settings. Previously, only group members who opted to be notified for each post in the group were notified. Group owners and managers require the "Send announcement emails" permission to use the send email feature. To notify all group members, select **Email all group members** next to the announcement expiration date.

 **Note:** The **Email all group members** feature is available only to groups with fewer than 10,000 members.

Group Files Lists

In Salesforce Classic, the Group Files list shows a group's recently posted files.

To see available file options, mouse over the file's name. To go to a file's detail page, click the file's name. To expand the files list, click **Show All**. On the files list you can:

- See a list of all the files that are posted to a group, search for a specific file, and perform actions on a file.
- Search for files that have been posted to the group. The list includes files that you and other people have attached to the Chatter feed on the group.
- Upload private files or upload and share files with people, groups, or via a link.
- Preview a file without downloading it.
- Follow a file and receive updates about it in the Chatter feed. To stop receiving updates about a file, click  next to the file that you're following (requires Chatter).
- To download, share, get a public link, view file details, upload a new version, edit file details, and delete files, click .

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

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- To view the file detail page, click a file name.
- To see a file owner's profile, click the owner's name.

 **Note:**

- You can't preview files larger than 25 MB, unknown file types, password-protected files, and copy-protected PDFs. For files that you can't preview, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce admin to request to regenerate the preview.
- Files without a file extension or with an unrecognized file extension show "unknown" in the Type column.

SEE ALSO:

[View Chatter Group Members](#)

Records in Chatter Groups

You can interact with your records through your Chatter groups. For example, you can create records and add and remove them from a group

[Create Records in Chatter Groups](#)

Use the group publisher to create records in Chatter groups.

[Make Records Available in Chatter Groups](#)

Add records to groups to collaborate on and discuss the records as a team.

[Remove Records from Chatter Groups](#)

Remove the records that you no longer use from your Chatter groups.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Create Records in Chatter Groups

Use the group publisher to create records in Chatter groups.

The actions that are available to you in the group publisher depend on a few things:

- Your permissions
- Your role in the group
- The group type
- The way your administrator has configured the group publisher

Here are some facts about records in group feeds:

- Depending on how your administrator configures the groups publisher layout, you can create account, contact, lead, opportunity, contract, campaign, case, and custom object records. Other objects aren't supported.
- When you create a record in a group, a record creation post appears in several places. For example, it appears in the group feed, on your profile, in the record feed, and in your company's Chatter feed. Only users with the necessary permissions (via license, profile, permissions, and sharing rules) can view the record and the record creation feed post.

 **Tip:** Filter the group feed to **Show All Updates** to view record creation posts.

- All comments on the record creation post appear in the group feed. In the group feed, you see the comments that are made in the record feed and by users who don't belong to the group.

For example, John creates a record in a private group. The record creation post appears in the group feed and in the record feed. Sally isn't a member of the same private group, but she has access to the record detail page and the record feed. Sally comments on the record creation post in the record feed, and it appears in the private group's feed.

- Record visibility in groups respects user permissions and sharing access rules in your organization. Group members with permissions can view the record and comment on it from any context. For example, they can comment in a group, on the owner's profile, on the record detail page, and in the company's Chatter feed.

Group members without permissions, such as Chatter Free users, can't see the record or the record feed in the group or anywhere else.

- You can't create records in groups that allow customers.
- If your administrator has enabled [adding records to groups](#):
 - Creating a record within a group automatically creates a group-to-record relationship. This relationship is the same as when you add an existing record.
 - The group records list displays the records that you create, in addition to the records that you add.

You can [remove records from Chatter groups](#).

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To create a record in Chatter groups:

- Create on the object

Make Records Available in Chatter Groups

Add records to groups to collaborate on and discuss the records as a team.

1. From the group publisher, click **Add Record**.

 **Note:** If you don't see this option, ask your administrator to include the Add Record action in the group publisher. You can't add records to groups that allow customers.

2. From the **Record** list, select a record type.

You can add account, contact, lead, opportunity, contract, campaign, case, and custom object records. Other objects aren't supported.

3. In the blank search field, enter the name of the record to search for and click . To search for all available records of the selected type, leave the field blank.

4. From the lookup search results list, select the record to add to the group.

5. Click **Create**.

A success message confirms when the record is added to the group. The record appears in the Group Records list. If the Groups related list appears on the record detail page, you can see the list of groups that the record is associated with. There is no limit to the number of records you can add to a group.

 **Note:** Adding a record to a group doesn't affect its visibility. Only users with the necessary permissions (via license, profile, permission sets, or sharing) can see the records in a group. For example, Chatter Free users don't see any records in groups. Or, a user with permissions to view only accounts and contacts can't view any case records in the group. Permissions can influence whether users see fewer records than the actual count indicated on the group records list.

 **Example:** Here are some ways to use Chatter groups to collaborate on records that you're working on.

- A sales team that is working together on an account can track the related opportunities, contacts, and leads in one group. Team members with permissions can access records directly from the group. New team members can use the group as a one-stop reference to familiarize themselves with historical discussions about the account and its child records.
- Customer service teams can use groups to track the cases that they handle. The group can become the team's forum to monitor cases, discuss solutions, and analyze trends in common problem areas.
- Marketing teams can use groups to track their campaigns, plan events, and discuss the potential leads and contacts to invite for the event. Groups also make for a great space to collaborate on marketing content or campaign artifacts.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To view a group record or add a record to a group:

- Read on the record
- Access to the group

Remove Records from Chatter Groups

Remove the records that you no longer use from your Chatter groups.

Anyone with access to a record in a group can remove it from the group.

1. On the group detail page, click **Show All** next to the Group Records list.

 **Note:** The group records list appears on the group detail page only if your administrator lets you add existing records to groups.

2. Optionally, select an option from the **Filter By** list to view records of that type.
3. Find the record that you want to remove, then click **Remove** next to the record's name.

Removing a record from a group deletes the group-record relationship. It doesn't remove the record itself. You can restore the group-record relationship from the Recycle Bin.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To remove group records:

- Read on the object
- Access to the group

Private Messages

Use Chatter messages for secure private conversations with other Chatter users.

Chatter Messages

In Salesforce Classic, send a question to another person privately, or communicate with a limited set of people. Messaging is useful when a discussion isn't relevant to everyone you work with. Messages also notify people when a file is shared with them.

Search for Chatter Messages

Use the search box above your messages to search for Chatter messages.

Send Chatter Messages

In Salesforce Classic, to communicate privately, use Chatter messages.

Chatter Messages

In Salesforce Classic, send a question to another person privately, or communicate with a limited set of people. Messaging is useful when a discussion isn't relevant to everyone you work with.

Messages also notify people when a file is shared with them.

Messages don't appear in your feed, your profile, global search results, or any part of Chatter that's publicly visible.

Open the My Messages page by clicking the **Messages** link on the Chatter tab. On the My Messages page, you can:

- See the most recent message in each of your conversations. The most recent message appears at the top of the list.
- See the photo of the person who sent the most recent message.
- See if you have unread messages (●).
- See if you sent the most recent reply (←).

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

- To view the full history of messages that were exchanged in a conversation, click any message.
- Send a message by clicking **New Message**.

Your messages are organized into conversations. It's the unique combination of the people who participate in a conversation that defines it. For example, let's say you send a message to S. Smith. When S. Smith replies, the reply continues your one-on-one conversation. Every new message you send to S. Smith—even if it's about a different topic—also continues the same conversation. Over time, you build a rich conversation history with S. Smith that contains every message you've ever exchanged. At the same time, let's say you send a message to both S. Smith and B. Johnson. That message is considered part of a separate conversation between you, S. Smith, and B. Johnson. When S. Smith replies, the reply continues in the conversation among you, S. Smith, and B. Johnson, rather than in your one-on-one conversation with S.

Consider these usage tips for Chatter messages.

- You can send messages to anyone in your Chatter organization. It doesn't matter who you follow, who's following you, what groups you belong to, or if the recipient is a customer.
- Conversations can involve up to 10 people total, including yourself. You can't send a message to yourself.
- Conversation participants are established when someone sends the first message in the conversation. No one can add people or remove people from the conversation after the first message is sent.
- As others reply, the **Messages** link on the Chatter tab shows the number of conversations with new messages. If you're already receiving Chatter email notifications, you're automatically notified of new messages.
- You can't delete messages or conversations.
- Imagine that, after reading the messages in a conversation, you want to mark the conversation unread. You can do so only with Connect REST API, and not with the user interface.

Search for Chatter Messages

Use the search box above your messages to search for Chatter messages.

To search for people and text in your Chatter messages:

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Let's say there are matches on names in the participant list, and the conversation involves lots of people. The match might not be visible because the participant list doesn't show everyone's name. That is, you see the conversation included as a match but the highlighted name match can be hidden from view.

To clear your search terms, click . Chatter automatically clears your search when you enter a reply, send a new message, or leave My Messages.

SEE ALSO:

[Share Files with People in Salesforce Classic](#)

Send Chatter Messages

In Salesforce Classic, to communicate privately, use Chatter messages.

To send a Chatter message:

1. Start the message from one of these locations:
 - Click the **Messages** link on the Chatter tab, then click **New Message** in My Messages.
 - Open a person's profile by clicking their name anywhere in Chatter, and then click **Send a message**.
 - Click **Send a message** on a person's hover.
 - When viewing the full message history of a conversation, use the text box under the most recent message to send a reply.
 - If email replies to Chatter are enabled, when you view an email notification about a message you've received, you can reply to the email.

Sharing a file with people is another way to send a Chatter message. When you share a file, recipients automatically receive a notification about the shared file, with any other information that you provided.

2. If you started in the Send a Message dialog box, you can add people's names to the recipient list. Type a name in the **To** field, and select the name by clicking it. Add more people to the conversation by entering more names.
If you're replying within a conversation or via email, the conversation participants can't be changed.
3. Write your message. Messages can be up to 10,000 characters.
4. Submit your message using the appropriate method:
 - In the Send a Message dialog box, click **Send**.
 - If you're replying within a conversation, click **Reply** (or **Reply All** if the conversation involves multiple recipients).
 - If you're replying via email, use the Send option in your email application.

If your message continues an existing conversation, your reply is added to the conversation and appears at the top of the list in My Messages. If your message starts a conversation with a unique combination of recipients, it appears as a new conversation at the top of the My Messages list.

SEE ALSO:

[Reply to Chatter Email Notifications](#)

Chatter Questions

Got questions? Use Chatter Questions to post a question to a feed, then watch the answers roll in.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

[Chatter Questions Overview](#)

Extend the best possible Experience Cloud self-service site by promoting engagement internally and externally with questions in Chatter.

[Display Similar Questions and Articles in Chatter](#)

In Salesforce Classic, you can reduce duplicate content by showing similar questions and relevant Salesforce Knowledge articles. In Chatter, potential answers pop open as the user asks a question. In Experience Cloud sites with Chatter, question deflection features are available through Experience Builder components.

[Display Similar Questions and Articles in the Customer Service Template Search](#)

Different Experience Cloud site users can ask similar questions. Chatter Questions helps reduce duplicate content in self-service sites that are built on the Customer Service template by showing similar questions and relevant Salesforce Knowledge articles. Potential answers appear on a list as a user enters a question in the Search field.

[Enable Similar Articles for Chatter Questions](#)

When users ask questions in Salesforce Classic, similar questions appear as they type. If you'd like relevant Salesforce Knowledge articles to appear, too, you can enable Similar Articles.

[Select a Best Answer for a Question in Chatter](#)

One of the advantages of asking a question in Chatter is that users can select the best answer. When a question has a best answer, users can quickly resolve an issue by going directly to the best answer.

[Chatter Questions Overview FAQ](#)

Chatter Questions lets users in Salesforce and Experience Cloud sites ask questions in the feed. Here are some common questions about the feature.

[Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#)

Keep tabs on the use and adoption of Chatter Questions in your organization or sites with reports and dashboards.

[Differences Between Q&A Features in Salesforce](#)

Salesforce offers various question-and-answer features that you can implement in your Salesforce organization and communities. Because some of these features use similar terminology, take a moment to review the differences between them.

Chatter Questions Overview

Extend the best possible Experience Cloud self-service site by promoting engagement internally and externally with questions in Chatter.

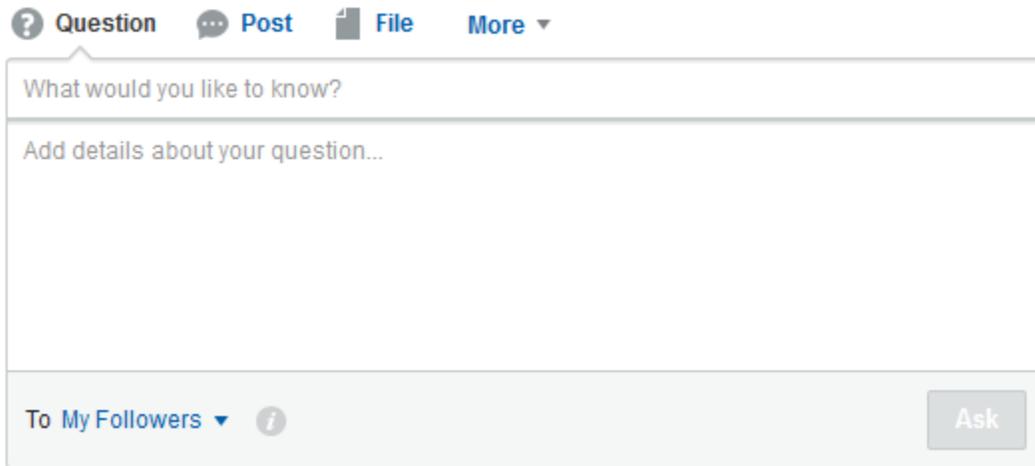
With Chatter Questions, users can ask questions in their Chatter feed, in groups, and in records. Select **Question** from the Chatter publisher's action menu, or click the Question tab. After a question is asked, moderators and the person who asked the question can select a best answer. The best answer is prominently displayed in the feed, allowing other users to quickly and easily find the information they need.

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

EDITIONS

Available in both: Salesforce Classic and Lightning Experience

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



The screenshot shows the Chatter Question creation interface. At the top, there are four tabs: 'Question' (with a question mark icon), 'Post' (with a speech bubble icon), 'File' (with a document icon), and 'More' (with a dropdown arrow). Below the tabs is a text input field with the placeholder text 'What would you like to know?'. Underneath that is a larger text area with the placeholder text 'Add details about your question...'. At the bottom of the form, there is a dropdown menu set to 'To My Followers' with an information icon to its right, and an 'Ask' button on the far right.

To enable Chatter Questions in your organization, add the Question action to the global publisher layout. If your organization was created after Summer '14, the Question action is automatically added. Nonetheless, we recommend that you drag it to the far left of the layout to increase its visibility. If you're using a customized publisher layout in groups or on records, make sure that the Question action is added to those layouts as well.

Chatter Desktop doesn't support Chatter Questions.

Chatter Questions Mobile Limitations

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different between Chatter Questions on desktop and on mobile.

When using Chatter Questions, you can't:

- See similar questions and knowledge articles when you ask questions.
- Select best answers.

Chatter Questions isn't fully supported in Salesforce for Android and Salesforce for iOS. When coworkers ask questions, you can see who posted but the text of the question isn't displayed. You can see any answers to the question, however.

SEE ALSO:

[Select a Best Answer for a Question in Chatter](#)

[Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#)

[Chatter Questions Overview FAQ](#)

Display Similar Questions and Articles in Chatter

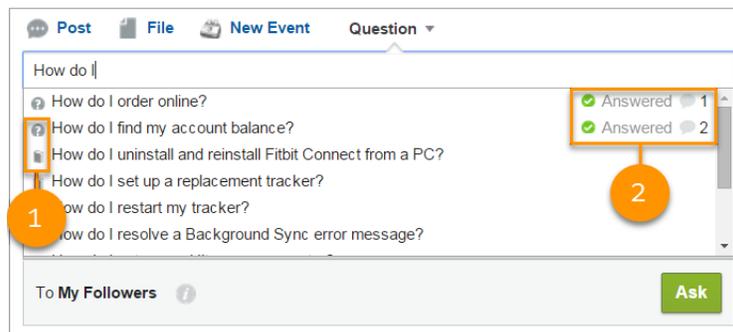
In Salesforce Classic, you can reduce duplicate content by showing similar questions and relevant Salesforce Knowledge articles. In Chatter, potential answers pop open as the user asks a question. In Experience Cloud sites with Chatter, question deflection features are available through Experience Builder components.

Note:

- Besides Salesforce Classic, question deflection is available in sites that are built on the Customer Service (Napili) template or built with Salesforce Tabs + Visualforce. For more information, select these components on an Experience Builder page, and view their properties [Ask Button](#) and [Contact Support and Ask Buttons](#).
- Similar Questions and Similar Articles aren't available in Lightning Experience or the Salesforce app.

When a user enters a question in Chatter, similar questions automatically appear in a list below the question title field. To show relevant Knowledge articles along with similar questions, [enable Similar Articles](#).

List of similar questions and articles below the question title field:



- 1:** Book and question mark icons indicate whether a search result is an article or a question.
- 2:** Question results show the question title, the number of answers, and a green flag with the text **Answered** when a best answer is selected.

Users see up to 10 results in the results list, with questions appearing before articles. Salesforce shows an equal number of questions and articles. But if there aren't enough of one result type, extra results of the other type are shown. If no question or article title matches the text entered by the user, the results list doesn't appear.

Results are based on whether the question or article **title** contains the text entered by the user. The search accounts for partially matching terms and non-adjacent terms. For example, the results for "best backpack" could include a question titled "Which backpack is best for day hikes?", and the results for "backpack" could include an article titled "Backpacking Tips."

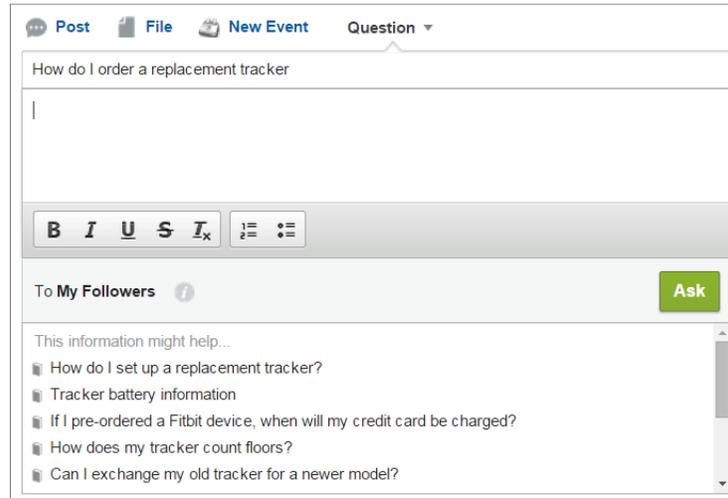
The user can conduct a search that also scans question descriptions and article text by pressing TAB or clicking out of the title field. Moving out of the title field causes a separate list of results to appear below the question publisher.

Advanced dropdown search results of similar questions and articles:

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Chatter Questions is available in: **Group, Professional, Developer, Performance, Enterprise, Contact Manager,** and **Unlimited** Editions



If no result answers the user's question, they can post their question by clicking **Ask**.

SEE ALSO:

[Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#)

Display Similar Questions and Articles in the Customer Service Template Search

Different Experience Cloud site users can ask similar questions. Chatter Questions helps reduce duplicate content in self-service sites that are built on the Customer Service template by showing similar questions and relevant Salesforce Knowledge articles. Potential answers appear on a list as a user enters a question in the Search field.

 **Note:** Similar Questions and Similar Articles are also available in internal Salesforce organizations with Chatter and in sites built with Salesforce Tabs + Visualforce. To learn more, see [Display Similar Questions and Articles in Chatter](#).

When a user enters a question in the Search field, similar questions and Knowledge articles appear in a list below the field. The list contains two tabs: **Articles** and **Questions**.

 **Note:** To expose an All tab that shows combined results (recommended), enable [Similar Articles](#) on page 159.

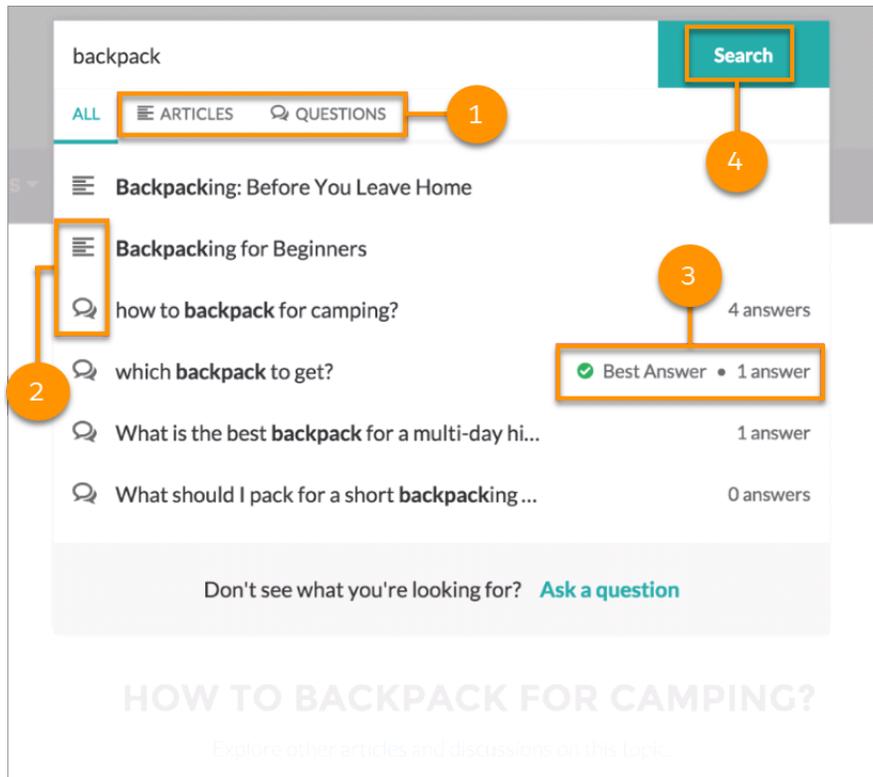
By default, each tab contains up to six results. The **All** tab shows both matching articles and questions, with articles appearing first. It displays an equal number of questions and articles. If there isn't enough of one type of result, more results of the other type are displayed to reach the maximum. To see results of a particular type, users can click the **Articles** and **Questions** tabs. If a search only returns one result type (for example, questions), users still see all the tabs.

 **Note:** For a user to see similar articles, Knowledge must be enabled in the site and the user must have access to it.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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



- **1:** The **Articles** and **Questions** tabs let users view results of each type. Users can use the Up and Down arrow keys to navigate between results on any of the tabs. Clicking a question or article in the list navigates directly to it.
- **2:** Text and chat bubble icons indicate whether a search result is an article or a question.
- **3:** Questions in the list show the number of answers. If a question was answered, a green checkmark with the text *Best Answer* appears next to it in the list.
- **4:** Search results are based on whether the question or article title contains the text entered by the user. When the user performs a full search by clicking **Search**, the search engine also scans question descriptions and article text for matching terms.

To customize the search settings, edit the Search Publisher component in Experience Builder.

SEE ALSO:

[Enable Similar Articles for Chatter Questions](#)

[Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#)

Enable Similar Articles for Chatter Questions

When users ask questions in Salesforce Classic, similar questions appear as they type. If you'd like relevant Salesforce Knowledge articles to appear, too, you can enable Similar Articles.

 **Note:** Chatter and Salesforce Knowledge must be enabled in your organization.

Enabling Similar Articles turns on the feature in:

- Your internal Salesforce organization (Salesforce Classic only)
 - Your Experience Cloud site that's built with Salesforce Tabs + Visualforce or the Customer Service (Napili) template
1. From Setup, enter *Knowledge Settings* in the *Quick Find* box, then select **Knowledge Settings**.
 2. Under Chatter Questions Settings, select **Display relevant articles as users ask questions in Chatter (also applies to sites with Chatter)**.

 **Note:** Make sure that the Question action has been added to the desired page layouts. Otherwise, users can't see it.

To learn more about how Similar Articles and Similar Questions work, see:

- [Display Similar Questions and Articles in Chatter](#)
- [Display Similar Questions and Articles in the Customer Service Template Search](#)
- See the properties on the Experience Builder components [Ask Button](#) and [Contact Support and Ask Buttons](#).

SEE ALSO:

[Display Similar Questions and Articles in the Customer Service Template Search](#)

Select a Best Answer for a Question in Chatter

One of the advantages of asking a question in Chatter is that users can select the best answer. When a question has a best answer, users can quickly resolve an issue by going directly to the best answer.

Moderators and the person who asked the question can:

- Select the best answer for a question
- Remove the best answer status from an answer

Only one answer can be selected as the best answer. Moderators can be the Chatter moderator, the Experience Cloud site moderator, or the Salesforce administrator. If a user doesn't have permission to select the best answer for a question, they don't see the **Select as Best** option.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Chatter Questions is available in: **Group, Professional, Developer, Performance, Enterprise, Contact Manager,** and **Unlimited** Editions

USER PERMISSIONS

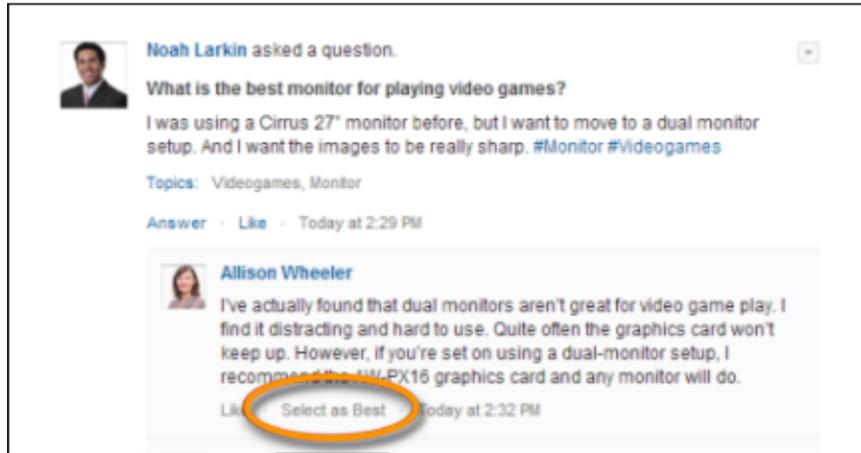
To enable Similar Articles for Chatter Questions:

- "Customize Application"

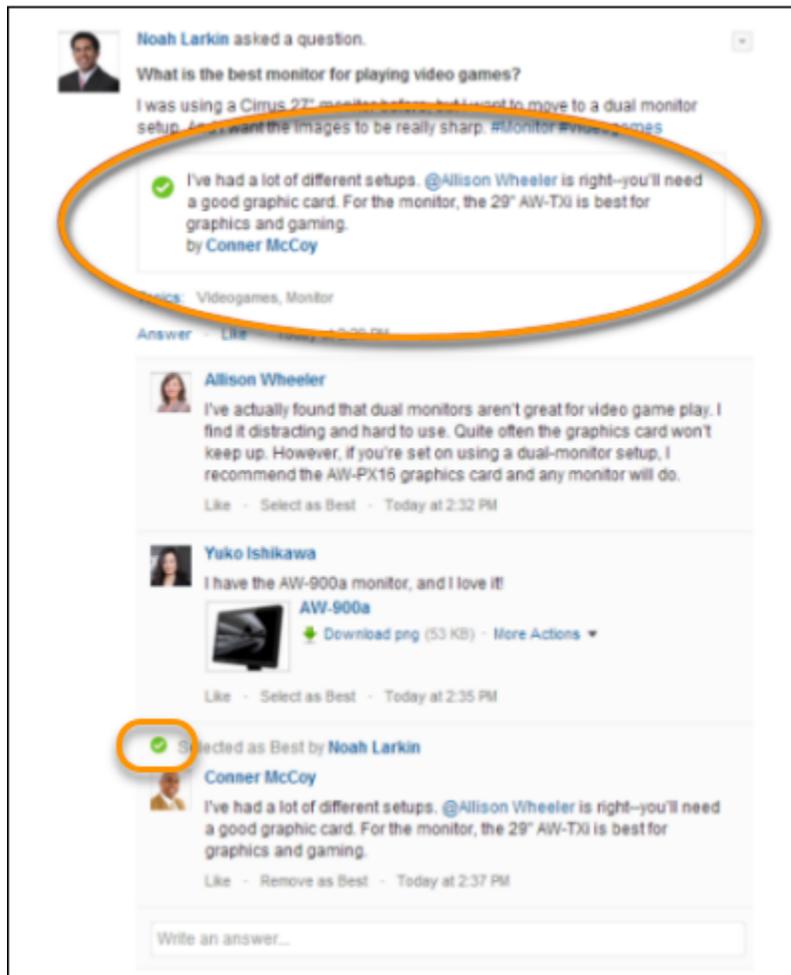
EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Chatter Questions is available in: **Essentials, Group, Professional, Developer, Performance, Enterprise, Contact Manager,** and **Unlimited** Editions



When an answer is selected as a best answer, a check mark (✓) appears next to it. A copy of the best answer also appears at the top of the list of answers so other users can quickly spot it.



Chatter Questions Overview FAQ

Chatter Questions lets users in Salesforce and Experience Cloud sites ask questions in the feed. Here are some common questions about the feature.

Why use Chatter Questions instead of asking my question in a regular Chatter post?

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

Can I filter the Chatter feed to show only questions?

Yes, in Salesforce Classic. At the top of your Chatter feed, click  next to **Show** and select **Questions**.

Can I search for questions in Chatter?

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

Is Chatter Questions available in the Salesforce mobile app?

No.

What happens when someone asks a question?

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

Who can select a best answer for a question?

The person who asked the question and moderators can select the best answer for a question. Moderators can be the Chatter moderator or the site moderator. Your Salesforce administrator can also select the best answer for a question. For details, see [Select a Best Answer for a Question in Chatter](#).

Can I track Chatter Questions use and adoption in my Salesforce organization?

Yes, in Salesforce Classic and sites. For details, see [Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#).

SEE ALSO:

[Display Similar Questions and Articles in Chatter](#)

[Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites](#)

Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites

Keep tabs on the use and adoption of Chatter Questions in your organization or sites with reports and dashboards.

Reports on Chatter Questions help you answer questions such as:

- What kinds of questions are users asking?
- How many questions were asked in the past month?
- What percentage of questions go unanswered?
- Which topics do users ask the most questions about?
- Which departments are asking the most questions?

To track the use of Chatter Questions in your *Salesforce organization*, download the [Salesforce Chatter Dashboards](#) on AppExchange. For help with getting started, see [Report on Chatter with the Dashboards Package](#).

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Chatter Questions is available in: **Group, Professional, Developer, Performance, Enterprise, Contact Manager,** and **Unlimited** Editions

To track the use of Chatter Questions in your *sites*, download the [Salesforce Communities Management \(for Communities with Chatter\)](#) on AppExchange. For help with getting started, see [Report on Communities with the AppExchange Packages for Community Management](#).

Differences Between Q&A Features in Salesforce

Salesforce offers various question-and-answer features that you can implement in your Salesforce organization and communities. Because some of these features use similar terminology, take a moment to review the differences between them.

Salesforce has released three features that let users post questions and answers in a public forum setting. While these features share a common purpose, they represent an evolution of Salesforce's Q&A features.

Q&A Feature	Description	Structure	How Users Access It
Version 1: Answers (Salesforce Classic only)	Answers, released in Winter '11, was Salesforce's first Q&A feature for communities. Starting in Summer '13, Answers isn't available in new orgs.	Answers is built on the Question standard object.	Internal users access the Answers feature via the Answers tab in Salesforce.
Version 2: Chatter Answers (Salesforce Classic only)	Chatter Answers, released in Spring '12, was intended for customers who liked the Answers user experience but wanted more features. Chatter Answers let companies maintain an out-of-the-box, self-service site where users could help address each other's questions, and provided a feed view of users' questions. Starting in Summer '16, Chatter Answers isn't available in new orgs.	Chatter Answers is built on the Question standard object.	Internal users access Chatter Answers via the Q&A tab, and moderators can view a list of questions in the Questions tab.
Version 3: Chatter Questions	Chatter Questions, released in Winter '15, represents the most advanced developments in Salesforce Q&A	Chatter Questions is built on the Chatter data model, and uses the Feed Post and Feed Comment objects.	Internal users access Chatter Questions within Chatter. They use the Question action in the Chatter objects.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Chatter Questions is available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Q&A Feature	Description	Structure	How Users Access It
	<p>functionality. Because it takes advantage of Chatter's built-in capabilities, it's ideal for customers who want their Q&A feature tightly integrated into Chatter.</p> <p>Chatter Questions is available in Salesforce orgs, as well as in Experience Cloud Aura and Visualforce sites where Chatter Questions is enabled.</p>		<p>publisher to post a question, and all questions are visible in the Chatter feed.</p>

Create, Share, and Organize Files

Post files to feeds and records, share files with customers, and organize files into folders and libraries.

[Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#)

Explore the differences in the various ways to manage your files and content.

[Salesforce Files](#)

On the Files tab, organize and access your files.

[Enable Salesforce Files Settings For Managed Packages](#)

To avoid an exception error while installing the managed package, enable the Skip triggers execution and validation rules on asset files setting.

[Files Connect External Files](#)

Browse, search, and share external files right from Salesforce.

[Document Libraries](#)

Store files without attaching them to records.

[Salesforce CRM Content](#)

Organize, share, search, and manage all types of files within your organization.

[Google Apps](#)

Integrate Google apps like Google Docs and Gmail with Salesforce.

Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments

Explore the differences in the various ways to manage your files and content.

	Files Home	Salesforce CRM Content	Salesforce Knowledge	Documents Tab	Attachments
Purpose	Upload, store, find, follow, share, and	Publish and share official corporate files	Create and manage content, known as	Store web resources, such as logos, DOT	Attach files to records from the

	Files Home	Salesforce CRM Content	Salesforce Knowledge	Documents Tab	Attachments
	collaborate on Salesforce files in the cloud.	with coworkers and deliver them to customers.	<i>articles</i> , in a knowledge base. Internal users and customers can quickly find and view the articles that they need. Customers include people on your Customer Portal, partner portal, Service Cloud Portal, or Lightning Platform Sites.	files, and other Visualforce materials in folders without attaching them to records.	Attachments related list on selected detail pages.
Common Uses	Upload a file and store it privately until you're ready to share it. Share the file with coworkers and groups to collaborate and get feedback. Attach files to posts in a Chatter feed on the Home tab, Chatter tab, a profile, a record, or a group.	Create, clone, or modify a sales presentation and save it so only you can see it and work on it. When you're ready, publish it so other users in your company have access to it. Create a content pack and send it to customers.	Write, edit, publish, and archive articles using the Articles Management tab, or find and view published articles using the Articles tab. If Salesforce Knowledge is enabled in your Customer Portal, partner portal, Service Cloud Portal, or Lightning Platform Sites, customers and partners can access articles. Create a public knowledge base so website visitors can view articles.	Add a custom logo to meeting requests by uploading your logo to the Documents tab.	Add a file to a specific record, like an event, marketing campaign, contact, or case by attaching it on the Attachments related list.
Supported File Types	All	All	All	All	All
Maximum File Sizes	2 GB	<ul style="list-style-type: none"> • 2 GB • 2 GB (including headers) when 	5 MB	<ul style="list-style-type: none"> • 5 MB • 20 KB for a custom-app logo 	<ul style="list-style-type: none"> • 25 MB for file attachments

Files Home	Salesforce CRM Content	Salesforce Knowledge	Documents Tab	Attachments
	<ul style="list-style-type: none"> uploaded via Connect REST API • 2 GB (including headers) when uploaded via REST API • 38 MB when uploaded via SOAP API • 10 MB when uploaded via Bulk API • 150 MB when uploaded via Bulk API 2.0 • 10 MB when uploaded via Visualforce 			<ul style="list-style-type: none"> • 2 GB for feed attachments

SEE ALSO:

[Using Salesforce Files](#)

Salesforce Files

On the Files tab, organize and access your files.

[Using Salesforce Files](#)

Use Salesforce Files to share and collaborate on files, store files privately, manage version updates, and follow files that are important to you. Use Files Connect to connect to external file systems right from Salesforce.

[Files Home](#)

Files Home is the central location of your files in Salesforce. See all files that you've stored privately, view files that are shared with you, and share files with others.

[Upload Files](#)

Upload files to Files home, feeds, and records.

[Upload a New Version of a File](#)

Replace an old version of a file by uploading a new version.

[Search for Files](#)

There are a few ways to find the file you're looking for. You can search from the global header at the top of your browser. You can use a feed search. And you can use the files-specific search field on Files home.

[Attach Multiple Files to a Chatter Post](#)

Attach up to 10 files to a Chatter post. View multiple file previews in the Chatter feed.

[Filter Your Files List](#)

Use the filters on the **Files** page to quickly access to your files in Salesforce.

[Create Folders in Libraries in Lightning Experience](#)

Organize library files into folders to find what you need quickly.

[File Size and Sharing Limits](#)

Here are some size and sharing limits for Salesforce Files and other file types.

[File Privacy and Sharing](#)

Keep your files private, or choose from a variety of sharing options.

[File Updates in the Feed](#)

Follow a file to see updates about the file in your feed, view a file's version history, and get file recommendations.

[File Previews and Details](#)

View and edit file details, and report on files.

Using Salesforce Files

Use Salesforce Files to share and collaborate on files, store files privately, manage version updates, and follow files that are important to you. Use Files Connect to connect to external file systems right from Salesforce.

Watch a Demo: [▶ Checklist for Salesforce Files](#)

Working with files in Salesforce means:

- Posting files to Chatter feeds to collaborate with coworkers.
- Adding files directly to records, such as Accounts, Cases, Leads, and more, to keep information right where you need it.
- Sharing files with customers in the secure Salesforce cloud.
- Connecting to external file systems with Files Connect.
- Running standard and custom file reports to understand how people work with files.

All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs and image files. You can upload and download audio and video files, but you can't parse or preview them.

 **Note:** In Internet Explorer 11, the **Preview** option redirects to the file detail page.

As you work with files in Salesforce, keep these file limits in mind:

Feature	Limit
Organization-wide storage	Storage is based on the number of Salesforce licenses purchased. Additional storage can be purchased.
File size	<ul style="list-style-type: none"> • 2 GB when uploaded via the web interface • 100 MB when uploaded from a mobile device
Maximum number of versions per file	2,048

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

 **Note:**

- For information about the different file tools and solutions in Salesforce, see [Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#).
- To learn who can perform which actions on a file, see [Who Can See My File?](#)
- Files from external repositories, like Google Docs and Microsoft® SharePoint®, are available only if Salesforce Files Connect is configured in your organization and enabled for you.
- Chatter feeds, groups, and the ability to follow files are available only for orgs that have Chatter enabled.
- Files do not require Chatter but if your org uses profile-based Chatter rollout, users must have Chatter permissions enabled for Files to be available.
- The files and photos that your users upload are counted towards your org's file storage allowance. Files uploaded on the Files tab are also counted towards your org's file storage allowance.
- Salesforce doesn't remove geolocation information from uploaded images.

SEE ALSO:[Preview Files and Edit File Details](#)[Who Can See My File?](#)[Change File Access in Salesforce Classic](#)[Upload a New Version of a File](#)[Attach a File to a Post or Comment](#)[Follow a File](#)

Files Home

Files Home is the central location of your files in Salesforce. See all files that you've stored privately, view files that are shared with you, and share files with others.

Watch a Demo: [▶ Checklist for Salesforce Files](#)

From **Files** home, you can:

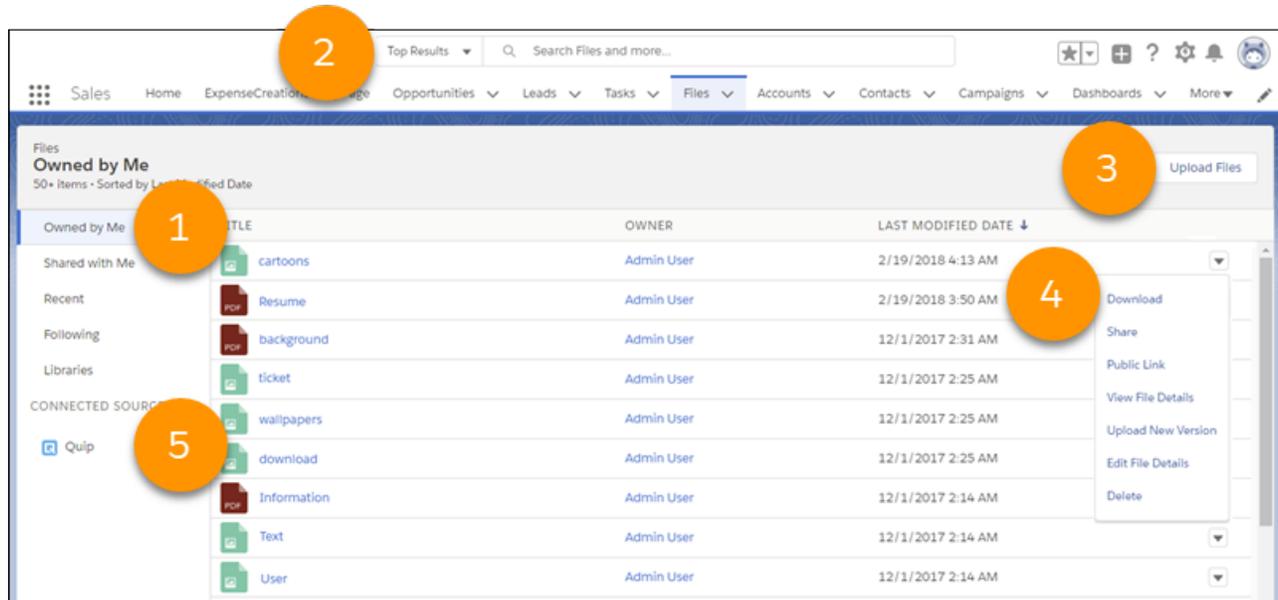
- See all the files that you own or have access to, and filter your list of files.
- Search for files using filters and by entering terms in the Files search box or the search box at the top of the page.
- See your favorite files and most recently accessed files under the Files dropdown.
- Upload private files or upload and share files with people, groups, or via a link.
- Preview a file without downloading it.
- Follow a file and receive updates about it in the Chatter feed. To stop receiving updates about a file, click  next to the file that you're following (requires Chatter).
- To download, share, get a public link, view file details, upload a new version, edit file details, and delete files, click .
- If Files Connect is enabled in your org, [browse, search, and share files](#) that are stored in an external data source right from Salesforce
- To view the file detail page, click a file name.
- To see a file owner's profile, click the owner's name.

Files home provides powerful tools for working with and managing your files.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



- To refine the list of files you see, filter your file list (1).
- Access files in your libraries from **Libraries** in the left navigation panel.
- Search (2) to find the files you need. In Salesforce Classic, filtering your file list also filters your search. To search all files you have access to, select the Recent filter.
- Upload files to Salesforce (3).
- All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs and image files. You can upload and download audio and video files, but you can't parse or preview them.
- Preview, download, share, and rename files directly from the file list (4).
- If Files Connect is enabled for your org, the left navigation panel displays a section for external file sources (5).

Files are automatically added to the file list when:

- You upload a file.
- You attach a file to a record.
- You or someone else attaches a file to a Chatter feed or comment.
- Someone else shares a file privately with you using the Sharing dialog box.
- You upload a file to a Salesforce CRM Content library.
- Someone else uploads a file to a library you're a member of.
- You or someone else creates a content pack or uploads a web link in Salesforce CRM Content. You only see files from content packs and web links you have access to.

SEE ALSO:

[Filter Your Files List](#)

[Who Can See My File?](#)

Upload Files

Upload files to Files home, feeds, and records.

You can upload files to:

- Files home
- Any Chatter feed post or comment field
- The files card or list on groups, user profiles, opportunities, and other records

Files Home

When you upload files on Files home, they're private (visible only to you) until you share them. Only file owners and users with the View All Data permission can see private files.

You can use the Owned by Me filter to view the files you own.

To upload files to a library, select the library and then click **Add Files**. Files you upload to a library inherit the sharing settings of that library.

You can also add files to Salesforce by:

- [Attaching a file to a Chatter post](#).
- [Uploading files to Salesforce CRM Content](#) private and shared libraries.

All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs and image files. You can upload and download audio and video files, but you can't parse or preview them.

 **Note:** Files without a file extension or with an unrecognized file extension show "unknown" in the Type column.

By default, you can upload Files up to 2 GB. However, the maximum file size you can upload is determined by your organization.

 **Note:** Salesforce doesn't remove geolocation information from uploaded images.

SEE ALSO:

[File Size and Sharing Limits](#)

[Prevent Others from Sharing and Unsharing a File](#)

Upload a New Version of a File

Replace an old version of a file by uploading a new version.

Uploading a new version of a file replaces the previous version, but [previous versions](#) are still available. To see previous versions, click **Show all versions** on the file detail page. If your original file was uploaded via a feed post, use **Upload New Version** to replace the old version.

1. Click **Upload New Version** from any of these locations:
 - The file detail page
 - The file previewer
 - The Files page, via the actions arrow for the file
 - On a file in a feed, via the More Actions arrow (available in Salesforce Classic only)
2. Click **Choose File**, and select a file from your computer.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

At this point, you can enter a note about what changed in the **What Changed?** field. This information is shown on the [Version History](#) list.

3. Click **Upload New Version** (Salesforce Classic) or **Start Upload** (Lightning Experience).

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

Note:

- Only file owners, collaborators, and users with the Modify All Data permission can upload new versions of a file. To learn who can perform which actions on a file, see [Who Can See My File?](#)
- The file owner doesn't change when a collaborator uploads a new version.
- If the file is from Salesforce CRM Content, you can't upload a new version from the file detail page. You can click **Go to Content Detail Page** and upload a new version there. (Available in Salesforce Classic only.)

SEE ALSO:

[View File Version History](#)

[Follow a File](#)

Search for Files

There are a few ways to find the file you're looking for. You can search from the global header at the top of your browser. You can use a feed search. And you can use the files-specific search field on Files home.

In Salesforce Classic and Lightning Experience, you can search for files from the header search field. Use [feed search](#) to find files posted in a specific Chatter feed, such as on a profile, on a record, or in a group.

Files home lists both the files you own and the ones that you have access to. The list includes files that are posted to feeds. Click a filter in the sidebar to see and search within that selection of files.

- **Recent**
- **Owned by Me**
- **Shared with Me**
- **Following**

In Salesforce Classic, you can also search for files using the Files search:

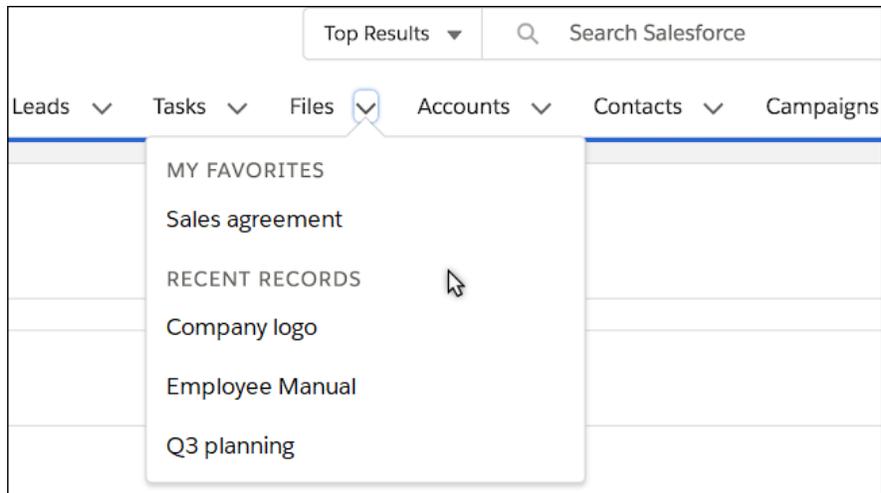
1. Optionally, on the **Files** tab click a filter on the sidebar to restrict your search to a specific set of files.
2. Enter your terms in the Search field. You can search by file name, description, owner, type, or content.
3. To see a filtered list of all relevant files based on your search terms, click **Search**.
4. To clear your search terms, click .

In Lightning Experience, you can use the Files dropdown to see favorite and recent files.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



Note: The feed search returns results for file or link names that are shared in posts, but not in comments. Files searches don't include:

- Documents from the Documents tab in Salesforce Classic.
- Attachments from Notes and Attachments related lists.
- Attachments that aren't the first attachment. For example: if you attach `file1.pdf`, `file2.pdf`, and `file3.pdf` to a post, where `file1.pdf` is the first file you attach, only `file1.pdf` is included in the search results.
- Files within a .zip archive. Search can't unzip and index a .zip archive.
- Scanned PDF files register as images and aren't included in search results.
- Tables in a PDF file aren't indexed and may not appear in search results.

Search supports several file types and has file size limits. If a file exceeds the maximum size, the file's content isn't searched, but the file's name, description, type, and owner are.

File Type	File Extensions	Maximum File Size for Search
HTML	.htm, .html, .xhtml	5 MB
PDF	.pdf	25 MB
PPT	.ppt, .pptx, .pptm	25 MB
RTF	.rtf	5 MB
Text	.c, .cpp, .css, .csv, .ini, .java, .log, .sql, .txt	5 MB
Word	.doc, .docx, .docm	25 MB
XLS	.xls, .xlsx, .xlsm	5 MB

File Type	File Extensions	Maximum File Size for Search
XML	.xml	5 MB

SEE ALSO:

[Follow a File](#)

[Filter Your Files List](#)

Attach Multiple Files to a Chatter Post

Attach up to 10 files to a Chatter post. View multiple file previews in the Chatter feed.

Add up to 10 files to one Chatter post in Lightning Experience and Experience Builder sites.

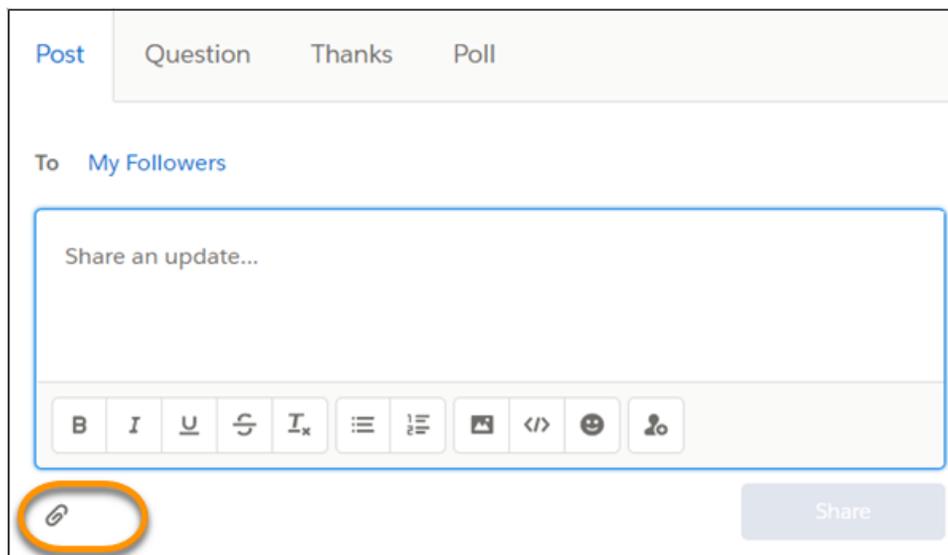
 **Note:** On comments, you can attach only one file.

1. In the Chatter publisher, click in the Share an Update field to expose the Attach icon.

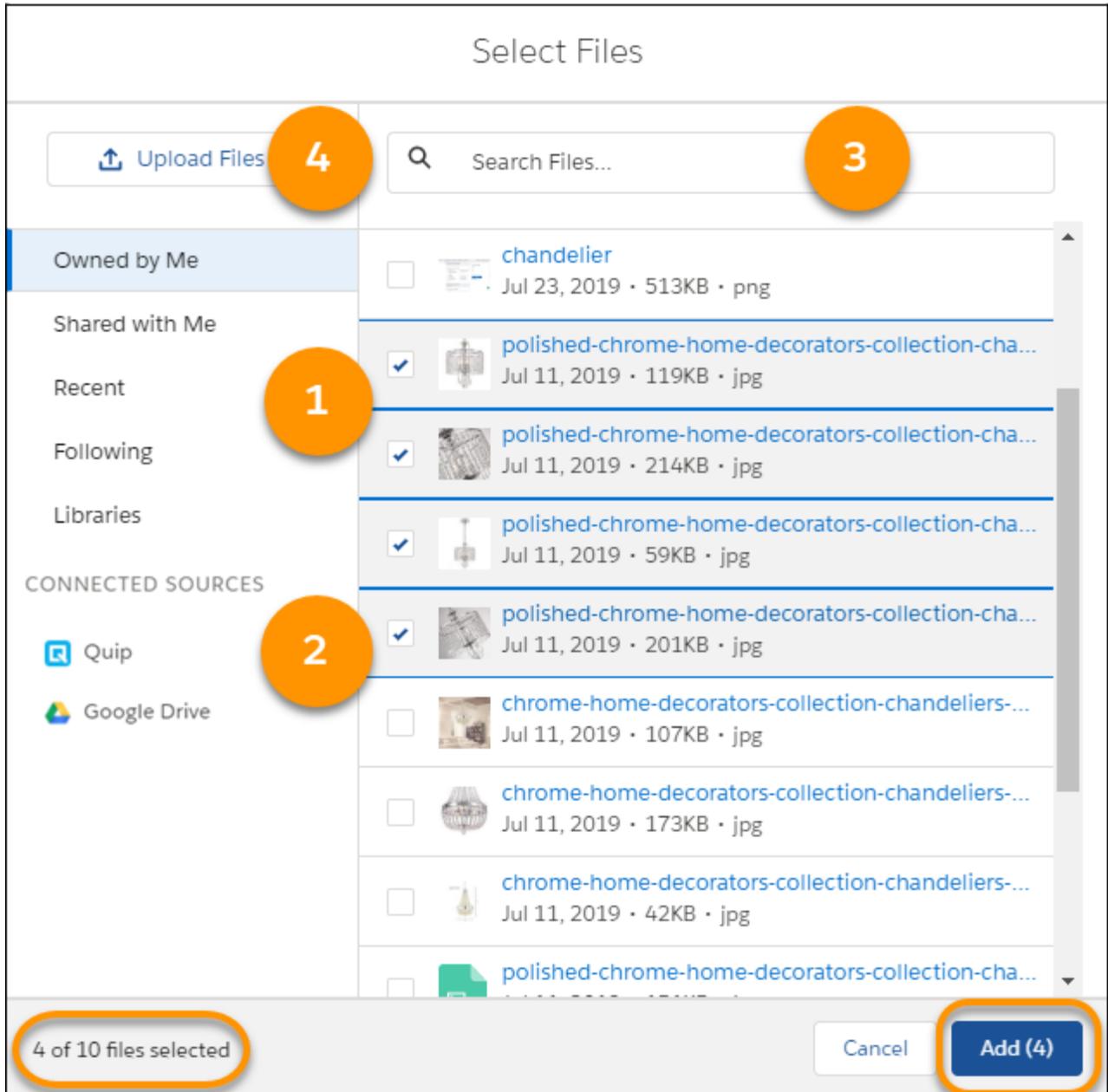
EDITIONS

Available in: Lightning Experience and Experience Builder sites

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



2. Click  the Attach icon to open the Select Files dialog.



3. You have some options for choosing up to 10 files.
- Select a category, and browse its related files (1).
 - Select a content source, and browse its related files (2).
 - Search for the file by its file name (3).
 - Click **Upload Files**, and browse your local drive for files (4).

At the bottom of the dialog, there's a count of selected files. The **Add** button also shows the current total.

4. When you finish your selection, click **Add**.

Filter Your Files List

Use the filters on the **Files** page to quickly access to your files in Salesforce.

The Files page lists all the files that you have access to. Filters show you different groups of those files, letting you find what you're looking for quickly.

Filter Name	Description
Recent	The most recent files you've viewed.
Owned by Me	Only the files you've uploaded to Salesforce in Chatter, libraries, and directly in Files home.
Shared with Me	Files that have been shared with you either by a private share or a public post to your profile.
Following	The files you're following in Chatter. This filter is available only in organizations that use Chatter.
Libraries	Files that anyone has uploaded to libraries that you're a member of and all files that you uploaded to your private library. Files are grouped by library name.
Related Files	This filter appears in records for activity-enabled objects, such as leads, contacts, person accounts, opportunities, cases, and custom objects. Use this filter to pick a file that is already a part of the record.

SEE ALSO:

[View Where a File Is Shared](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Create Folders in Libraries in Lightning Experience

Organize library files into folders to find what you need quickly.

Library managers can create, rename, and delete folders in libraries in Lightning Experience. Folders are visible to all users who have access to the library. The **New Folder** button adds a folder to the library or creates a subfolder within a folder. You can create multiple levels of subfolders. The row-level **Move** action lets you move a file among folders and subfolders within a library.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To add folders to a library:

- Manage Salesforce CRM Content

OR

Manage Library checked in your library permission definition

OR

Organize File and Content Folder checked in your library permission definition

The screenshot shows the Salesforce Lightning Experience interface for a library named "Employee Training" containing 5 items. The interface includes a navigation bar with tabs for Sales, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. The library view is organized into sections: "Owned by Me", "Shared with Me", "Recent", "Following", "Libraries", and "EXTERNAL SOURCES". The "EXTERNAL SOURCES" section includes "Files Connect Box" and "Google Drive". The main table lists the following items:

Owned by Me	TITLE ↑	LAST MODIFIED DATE	
Shared with Me	Compliance	12/7/2016 2:52 PM	▼
Recent	Continuing Education	12/7/2016 2:53 PM	▼
Following	New Hire Onboarding	12/7/2016 2:30 PM	▼
Libraries	Content Development Best Practices	11/23/2016 11:02 AM	▼
EXTERNAL SOURCES	Employee Training Presentation	11/23/2016 11:30 AM	▼

A context menu is open over the "Employee Training Presentation" file, showing the following options: Share, Download, File Details, Edit File Details, and Move.

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

Note: When viewing your libraries in Salesforce Classic or in mobile, you can see the folder structure that you created in Lightning Experience. Only one level of folders is viewable in mobile.

Get Started with Library Folders

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

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

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

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

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

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

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

Sort Library Folders

When you sort Folders by the **NAME** or **LAST ACTIVITY** columns, the Asset folder remains at the top of the list.

Although users can click them, the list can remain unchanged per design.

File Size and Sharing Limits

Here are some size and sharing limits for Salesforce Files and other file types.

Feature	Location	Limit
Salesforce Files	Files home, in libraries, in Chatter posts and comments, on a record’s Files related list	2 GB
Attachments	On a record’s related list in Lightning Experience. (In Lightning Experience, attachments are added as Salesforce files)	2 GB

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Feature	Location	Limit
	On a record's related list in Salesforce Classic	25 MB
Documents	Documents tab in Salesforce Classic	<ul style="list-style-type: none"> • 5 MB • 20 KB for a custom-app logo
Salesforce Knowledge attachments	Files attached to articles in Lightning Knowledge	5 MB
Chat	Chat	<ul style="list-style-type: none"> • 5 MB when transferring a file in a chat
Salesforce CRM Content	Content and Libraries tabs in Salesforce Classic	<ul style="list-style-type: none"> • 2 GB • 2 GB (including headers) when uploaded via Connect REST API • 2 GB (including headers) when uploaded via REST API • 38 MB when uploaded via SOAP API • 10 MB when uploaded via Bulk API • 150 MB when uploaded via Bulk API 2.0 • 10 MB when uploaded via Visualforce
Email messages, including attachments	Your Salesforce-integrated email application	25 MB

File Sharing Limits

A file can be shared a maximum of 2000 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

View the **Shared With** list on a file detail page to see who a file is shared with and their level of access.

SEE ALSO:

[Upload Files](#)

File Privacy and Sharing

Keep your files private, or choose from a variety of sharing options.

[Who Can See My File?](#)

Your files in Salesforce can be private to you, privately shared, or visible to your entire company. Learn how to identify a file's sharing settings and how to change them.

[Change File Access in Salesforce Classic](#)

File owners and collaborators can change file permissions for people and groups.

[Change File Access in Lightning Experience](#)

Decide who can view and modify the files that you own.

[Make a File Private](#)

You can restrict access to shared files that you own by making them private.

[Make a File Private on a Record](#)

Use the **File Privacy on Records** setting to control who can see a file when it's attached to a record. The setting is available when you edit a file's details.

[Share Files with Groups](#)

Share files in Chatter with public or private groups so that members of the groups can view and download the files from their feed.

[Share Files with People in Salesforce Classic](#)

Share files with people privately and set **Viewer** or **Collaborator** access for each person that you share the file with.

[Share Files with Libraries in Salesforce Classic](#)

Share files with libraries to take advantage of the permission-setting capabilities of content libraries while still using the features of Salesforce Files.

[Attach Files to Records](#)

Attach files to records for a powerful way to collaborate and stay organized in Salesforce. Keep information on an opportunity, account, or case right where you need it. Share relevant documents with anyone with access to the record.

[Prevent Others from Sharing and Unsharing a File](#)

You can prevent others from sharing and unsharing a file that you own. Preventing others from sharing or unsharing doesn't affect existing shares.

[Share Files with People in Lightning Experience](#)

Share files with people privately and set **Viewer** or **Collaborator** access for each person who you share the file with.

[Share Files Via Link](#)

Creating a public link generates a URL that you can copy and share with anyone inside or outside your company. Control access to the file with a password, or set the link to expire.

Who Can See My File?

Your files in Salesforce can be private to you, privately shared, or visible to your entire company. Learn how to identify a file's sharing settings and how to change them.

This table describes file sharing settings that depend on how the file is shared. The sharing setting and icon appear on a file's detail page and on the Shared With list on a file detail page.

Sharing Setting	Definition	When Does a File Have This Setting?
 Private	The file is private. It hasn't been shared with anyone else besides the owner. The file owner and users with Modify All Data permission can find and view this file. However, if the file is in a private library, only the file owner has access to it.	<p>A file is private when you:</p> <ul style="list-style-type: none"> • Upload it in Files home • Publish it to your private library • Stop sharing it with everyone (Make Private) • Delete posts that include the file and the file isn't shared anywhere else

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Sharing Setting	Definition	When Does a File Have This Setting?
 Privately Shared	<p>The file has been shared only with specific people, groups, or via link. It's not available to all users in your company. Only the file owner, users with Modify All Data or View all Data permission, and specific file viewers can find and view this file.</p> <p>External users see files posted to records they have access to, unless the record post was marked Internal Only.</p>	<p>A file is privately shared when it's:</p> <ul style="list-style-type: none"> • Shared only with specific people or a private group • Posted to a private group • Shared via link • Posted to a feed on a record • Published to a shared library
 Your Company	All users in your company can find and view this file.	<p>A file is shared with your company when it's posted:</p> <ul style="list-style-type: none"> • To a feed that all users can see • To a profile • To a record • To a public group

This table describes which actions you can perform on a file depending on your file permissions.

Action	File Owner	File Collaborator	File Viewer
View or Preview	Yes	Yes	Yes
Download	Yes	Yes	Yes
Share	Yes	Yes	Yes
Attach a File to a Post	Yes	Yes	Yes
Upload New Version	Yes	Yes	
Edit Details	Yes	Yes	
Change Permission	Yes	Yes	
Make a File Private	Yes		
Restrict Access	Yes		
Delete	Yes		

 **Note:**

- **No Access** means that only the people in your company with whom this file is shared can find or view the file. If the file is shared with a private group, only members of the group can find or view the file.
- Users with Modify All Data permission have built-in access to files that they don't own. They can view, preview, download, share, attach, make private, restrict access to, edit, upload new versions of, and delete files that they don't own. However, if the file is in a private library, then only the file owner has access to it.

- Users with View All Data permission can view and preview files that they don't own. However, if the file is in a private library, then only the file owner has access to it.
- Groups (including group members) and records have viewer permission for files posted to their feeds.
- Permissions for files shared with libraries depend on the library.

SEE ALSO:

[Make a File Private](#)

[View Where a File Is Shared](#)

[Prevent Others from Sharing and Unsharing a File](#)

Change File Access in Salesforce Classic

File owners and collaborators can change file permissions for people and groups.

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

1. On a file detail page, click **Share File** > **Sharing Settings**.
2. Find the person or group whose access you want to change, or change access for *Any Chatter user in your company*.
3. Select **Viewer**, **Collaborator**, or **No Access** (for your company). Or, for files shared with records, change to **Set by Record**. The change happens immediately.
 - **Viewers** can view, download, and share files.
 - **Collaborators** can view, download, share, change permission, edit the file, and upload new versions.
 - **Set by Library** for a file in a library means that access to the file follows access to the library. This setting can't be changed.
 - **Set by Record** for a file attached to a record means that access to the file follows access to the record. People with read/write access to the record have **Collaborator** access to the file. People with read-only access to the record have **Viewer** access to the file.
 - **No Access** means that only the people in your company with whom this file is shared can find or view the file. If the file is shared with a private group, only members of the group can find or view the file.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



Note:

- A file is shared with your company when it's posted:
 - To a feed that all users can see
 - To a profile
 - To a record
 - To a public group

Any Chatter user in your company is given viewer permission by default. If you change the permission from viewer or collaborator to no access, you remove sharing to the company and to public groups.

- When you share a file with someone, they are given `Collaborator` access by default. When you share a file with a group, the group members are given `Viewer` access by default. You can change the default access when you share a file for the first time. File owners and collaborators can change access after a file has been shared.

SEE ALSO:

[Who Can See My File?](#)

[Make a File Private](#)

[Prevent Others from Sharing and Unsharing a File](#)

Change File Access in Lightning Experience

Decide who can view and modify the files that you own.

From the Sharing dialog, you can change file permissions for people and groups to `Viewer`, `Collaborator`, or `Set by Record` for files shared with records.

- **Viewer** can view, download, and share files.
- **Collaborator** can view, download, share, change permission, edit the file, and upload new versions.
- **Set by Record** for a file attached to a record means that access to the file follows access to the record. People with read/write access to the record have `Collaborator` access to the file. People with read-only access to the record have `Viewer` access to the file.

If you disable Standard sharing for Knowledge, and the access of the content on a Knowledge record is `Set by Record`, then the user must have the `Modify All Data` permission to get `collaborator` access. The user doesn't inherit the `collaborator` access on the file attached to the Knowledge record based on the object-level access.

- **Set by Library** for a file in a library means that access to the file follows access to the library. This setting can't be changed.

File owners and collaborators can change file permissions for people and groups from `Viewer` to `Collaborator` and conversely. They can also change file permissions for files shared with their company to `Viewer`, `Collaborator`, or `No Access`.

1. On the file preview page or from the file actions list, select **Share**.
2. Expand **Who Can Access**.
3. Change file permissions for people and groups using the menu, or click the **X** next to a person or record to stop sharing the file.



Note:

- A file is shared with your company when it's posted:
 - To a feed that all users can see
 - To a profile
 - To a record
 - To a public group

All Chatter users in your company are given `Viewer` permission by default. If you change that permission from `Viewer` or `Collaborator` to `No Access`, the file is no longer shared with the company or with public groups.

- When you share a file with someone, they are given `Collaborator` access by default. When you share a file with a group, the group members are given `Viewer` access by default. You can change the default access when you share a file for the first time. File owners and collaborators can change access after a file has been shared.
- File link recipients can only view and download files. They can't be collaborators.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

- Admins can also add the **Prevent others from sharing and unsharing** option to page layouts, letting users prevent further sharing of the file from the file detail page.

Make a File Private

You can restrict access to shared files that you own by making them private.

Available in: Salesforce Classic

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

To stop sharing a file that you own or have the “Modify All Data” permission for, make the file and the file link private (🔒).

Important: On private files, file metadata is not also private. A user without permission to access a private file can nonetheless access the file’s metadata. So, for example, through a private file’s metadata, an unpermitted user can see who’s following the private file.

1. From the file detail page, click either  **Share File** > **Sharing Settings** or **Show All** on the Shared With list.
2. In the Sharing Settings dialog box, click **Make private** (or **Restrict access** if the file originated in a Salesforce CRM Content library).
3. In the confirmation dialog box, click **Make private** (or **Restrict access**).

Making a file private removes it from any posts that it’s attached to and removes it from everywhere that it’s been shared. Only the owner and people with the “Modify All Data” permission can access it. If the file originated in a Salesforce CRM Content library, it’s removed from everywhere that it’s been shared, except the library.

If the file is shared using a content delivery, the content delivery becomes inaccessible, but is not deleted. If the file is shared using **Share via link** in Chatter, the link to the file is deleted.

 **Note:** Salesforce doesn’t remove geolocation information from uploaded images.

SEE ALSO:

[Post Visibility](#)

[View Where a File Is Shared](#)

[Prevent Others from Sharing and Unsharing a File](#)

[Make a File Private on a Record](#)

Make a File Private on a Record

Use the **File Privacy on Records** setting to control who can see a file when it’s attached to a record. The setting is available when you edit a file’s details.

Available in: Lightning Experience

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

The **File Privacy on Records** option lets you control the visibility of a file when it’s attached to a record. If you don’t see the **File Privacy on Records** option when you edit a file’s details, ask your admin to add it. Only admins and file owners can change the value of **File Privacy on Records**.

Important: On private files, file metadata isn't also private. A user without permission to access a private file can nonetheless access the file's metadata. So, for example, through a private file's metadata, an unpermitted user can see who's following the private file.

Note: The **File Privacy on Records** option also appears in Salesforce Classic on the content detail page and content edit dialog. A file marked as private in Lightning Experience is also private in Salesforce Classic. This feature is also available in Experience Builder sites.

1. On the Files home page, open the actions menu of the file you want to change and select **Edit File Details**.
2. From the File Privacy on Records list, select an option for controlling the file's visibility when it's attached to a record.

The screenshot shows a dialog box titled "Edit videoconf". It contains a "Title" field with the text "videoconf" and a "Description" field. Below these is a dropdown menu for "File Privacy on Records". The dropdown menu is highlighted with an orange border and contains three options: "--None--", "Visible to Anyone With Record Access", and "Private on Records" (which is selected with a checkmark). At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

- **Visible to Anyone With Record Access** lets anyone who can see the record also see this file attachment under Files on the record's Related tab.
- **Private on Records** lets only the file owner see the file under Files on the record's Related tab.

3. Click **Save**.

According to your selection, whenever people view record details, they either see or don't see this file when it's attached to the record. The file owner sees the attachment, no matter the privacy setting.

SEE ALSO:

[Make a File Private](#)

Share Files with Groups

Share files in Chatter with public or private groups so that members of the groups can view and download the files from their feed.

Share a file with a private or unlisted group so that only members of the group can see it. Share a file with a public group so that all Chatter users in your company can see it. By default, anyone who can see a file can share it.

To share a file with one or more Chatter groups:

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

A private file shared with a private or unlisted group becomes a privately shared file and displays the privately shared icon (). The file is posted to the group's feed, and only the file owner and group members can find and view the file. All users in your company can view any file that's shared with a public group. A file that's shared with a public group displays the "your company" icon () and is posted to the group's feed.

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

- There is no share button or option on the file detail page on an Experience Cloud site or in an internal org, if the file originated from the site.
- Documents from the Documents tab and attachments from the Notes and Attachments related list aren't listed on Files home. And they can't be shared as Salesforce Files.
- If content files are part of a content pack or delivery, they can be shared with more people than shown in **Share with People**.
- A file can be shared a maximum of 2000 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

SEE ALSO:

[Group Files Lists](#)

[View Where a File Is Shared](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Share Files with People in Salesforce Classic

Share files with people privately and set **Viewer** or **Collaborator** access for each person that you share the file with.

Share a file privately so that only specific people in your company can see it. By default, anyone who can see a file can share it.

To share a file with one or more users in your company:

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

Unless the file's already shared with your company, it's privately shared and displays the privately shared icon (). It's not posted anywhere, and only the people who you specifically shared it with can find and view it. If it's already shared with your company, it retains the "your company" icon () and anyone in your company can find and view it.

To stop sharing the file with a person or a group, in the Sharing Settings dialog box, click  next to the person or group's name. If you don't want others to change who can access the file, select **Prevent others from sharing and unsharing**.

Note:

- There is no share button or option on the file detail page on an Experience Cloud site or in an internal org, if the file originated from the site.
- Documents from the Documents tab and attachments from the Notes and Attachments related list aren't listed on Files home. And they can't be shared as Salesforce Files.
- If content files are part of a content pack or delivery, they can be shared with more people than shown in **Share with People**.
- A file can be shared a maximum of 2000 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

SEE ALSO:

[View Where a File Is Shared](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Share Files with Libraries in Salesforce Classic

Share files with libraries to take advantage of the permission-setting capabilities of content libraries while still using the features of Salesforce Files.

If your admin has enabled file sharing for your org, you can share any file with a library. The **Libraries** tab in Salesforce Classic lists your company's libraries along with the permissions assigned to each. The **Share with library** option in Chatter lets you share Chatter files with a library, applying the permissions that are set for the library.

 **Note:** Sharing files with libraries requires that:

- Your user detail page has the **Salesforce CRM Content User** setting enabled. Your administrator can enable this setting.
- Your organization has the **Files user interface allows sharing files with libraries** setting enabled. Your administrator can enable this setting on the Salesforce CRM Content page in Setup.

1. On the **Files** tab, click  next to the file that you want to share with a library.
2. Select **Share with library**. Or, for external file references (only applicable for Files Connect users), select **Share a reference**, and choose **Library** in the **Sharing Settings** dialog box.
3. Do one of the following, depending on what happens next:
 - If the **Publish Content to Multiple Libraries** dialog box appears, it means that another library already manages the file. Select one or more other libraries, and click **Publish**.
 - If the **Share files with a library** confirmation message appears, it means that the file has been shared with people who have Collaborator access. If you proceed, Collaborators have only Viewer access. (A library administrator can give them editing access later.) To continue, click **Share**, or click **Cancel** if you've changed your mind.
 - If the **Publish Content** dialog box appears, enter a title for the file. Select the library you want to share it with, and enter any tags as metadata. Select a record type, enter any optional information, and click **Publish**.

The file is now listed on the **Libraries** tab and in **Files in My Libraries** on the **Files** tab.

SEE ALSO:

[Create Folders in Libraries in Lightning Experience](#)

Attach Files to Records

Attach files to records for a powerful way to collaborate and stay organized in Salesforce. Keep information on an opportunity, account, or case right where you need it. Share relevant documents with anyone with access to the record.

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, images, and videos—to most Salesforce records through the Files related list.

If you don't see the Files related list on a record, ask your admin to add it to the page layout for that record type. A file's visibility on a record is controlled by the **File Privacy on Records** setting. When you know that a file is attached to a record, but you don't see it, ask the file owner to adjust this setting.

In Lightning Experience

Click **Add Files** in the Files related list menu, or drag files directly onto the Files related list. (You can drag multiple files, but not a folder. You can't drag files onto read-only related lists.)

 **Note:** In Lightning Experience, your org may use a custom page layout for the file detail page. This page displays when you view or edit file details from the actions arrow on Files home, or when you edit file details from a file preview. However, if you click **Edit File Details** from the files related list on a record, the default file detail page displays instead of the custom layout. To see the custom file detail page layout on a file attached to a record, click the file's title to open the file preview, and then click **Edit File Details**.

In Salesforce Classic

Click **Upload File** in the Files related list.

- Files uploaded to the Files related list always become Salesforce Files, whether you're in Lightning Experience or Salesforce Classic.
- In Salesforce Classic, files uploaded to Notes & Attachments are either Salesforce Files or attachments, depending on how your org's preferences are set.
- Enable the preference to upload files as Salesforce Files in Salesforce Classic in Setup. Type *Salesforce Files* in the **Quick Find** box, select **General Settings**, and then click **Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments**.
- When the preference is enabled, the Notes & Attachments related list displays the **Upload Files** button. If not enabled, it displays the **Attach File** button.
- The preference *Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments* doesn't apply to the **Attachments** related list in the **Task and Event** object.

Limits

- In Salesforce Classic, the size limit for a file attached directly to the related list is 25 MB. This limit includes a file attached to a solution.
- In Lightning Experience, the size limit for a file attached directly to the related list is 2 GB.
- The file size limit for Chatter feed attachments is 2 GB.
- The size limit for an email message, including attachments, is 25 MB.
- If the **Don't allow HTML uploads as attachments or document records** security setting is enabled for your organization, you can't upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`, `.svg`.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

USER PERMISSIONS

To attach files to records:

- Read
- OR
- Edit on the object

- Uploads from the Files related list aren't supported in the Salesforce mobile app.
- Salesforce doesn't remove geolocation information from uploaded images.

SEE ALSO:

[Make a File Private on a Record](#)

Prevent Others from Sharing and Unsharing a File

You can prevent others from sharing and unsharing a file that you own. Preventing others from sharing or unsharing doesn't affect existing shares.

1. On **Files** home, find the file you want.
2. Go to **Sharing Settings** or **Share File** for the file. (Or, if the file is in a library, open the Content Detail page from the **Libraries** tab.)
3. Select the checkbox **Prevent others from sharing and unsharing**.
4. Click **Save**.



Example: Let's say I post a file in Chatter, and share it with a private group. I'm okay with members of the group having access to the file, but I don't want them to share it further. I can prevent sharing and unsharing so that the existing shares remain but new ones can't be added, except by me or an admin.

You can also prevent others from sharing and unsharing a file in the API by using the `SharingOption` field on `ContentVersion` and other objects.

Share Files with People in Lightning Experience

Share files with people privately and set **Viewer** or **Collaborator** access for each person who you share the file with.

Share a file privately so that only specific people in your company can see it. By default, anyone who can see a file can share it.

To share a file with one or more users in your company:

1. Start by sharing the file from one of these locations:
 - Next to the file on Files home, click  **Share**.
 - On the detail page of the file you want to share, click **Share**.
 - From the file preview player, click .
2. Enter the name of the person who you want to share the file with, and select the name by clicking it. To share with more than one person, enter more names.
3. Choose the file permission you want your audience to have. By default, they have [collaborator permission](#), which lets them view, download, share, change permission, edit the file, and upload new versions. To give your audience permission to view, download, and share files, select **Viewer**.
4. Optionally, add information to the message that recipients receive.
5. Click **Share** and **Close**. Recipients receive a link to the file and a message that you have shared a file with them. Lightning Experience users receive this message as an email notification. Salesforce Classic users get a private Chatter message on their My Messages page on the Chatter tab. If Classic users have email notifications for Chatter messages enabled, they also get an email notification.

If you want to stop sharing with a person or a group, in the Sharing Settings dialog box, click  next to the person or group's name.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

To see everyone the file is shared with, from the Share File window, click **Who Can Access**. Update file permissions or stop sharing the file by clicking  next to the name of a person or group. To prevent others from changing who can access the file, select **Prevent others from sharing and unsharing**.

 **Note:**

- There is no share button or option on the file detail page on an Experience Cloud site or in an internal org, if the file originated from the site.
- Documents from the Documents tab and attachments from the Notes and Attachments related list aren't listed on Files home. They can't be shared as Salesforce Files.
- If content files are part of a content pack or delivery, they can be shared with more people than are shown in **Share with People**.
- A file can be shared a maximum of 2000 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

Share Files Via Link

Creating a public link generates a URL that you can copy and share with anyone inside or outside your company. Control access to the file with a password, or set the link to expire.

Available in: Salesforce Classic and Lightning Experience

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

When you create a public link to a file, anyone who has the link can view and download the file. File link recipients can only view and download file—they can't be collaborators. When you share single files, you have the option to set a password and an expiration date. After you delete a link, it no longer provides access to the file. If you create another link, it creates a new URL.

Create a File Link in Lightning Experience

To share a link to a single file

- From Files home or a files related list on a record, right-click a file and choose **Public Link**.
- From Chatter, right-click the file thumbnail in the feed and choose **Public Link**.
- From the file, right-click and click **Share**. From the Sharing dialog, create a link in the **Who Can Access** section under **Public Link Sharing**.

Use the toggles to set an expiration date or password. Expiration dates are on by default and set 90 days in the future. You can adjust the date or disable the toggle. Turn on the password toggle to generate a password, which displays on your screen.

Click **Create link**, and then copy the link.

Create and Share a Public Link for a Folder in Lightning Experience

You can create public links to share folders to give people inside or outside your company access to a set of files. The public link is an encrypted URL. From the Library folder's row-level actions click **Public Link** > **Copy Link**. To delete the link, click **Public Link** > **trash can**.

Create and Share a File Link in Salesforce Classic

1. Start by sharing the file from one of these locations:

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

Unless the file's already shared with your company, it's privately shared and displays the privately shared icon (). It's not posted anywhere, and only the people who you specifically shared it with can find and view it. If it's already shared with your company, it retains the "your company" icon () and anyone in your company can find and view it.

To stop sharing a file by link, in the Sharing Settings dialog box, click  next to the link. Anyone with the link can no longer access the file.

 **Note:**

- Documents from the Documents tab and attachments from the Notes and Attachments related list can't be shared as Salesforce Files.
- A file can be shared a maximum of 2000 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

SEE ALSO:

[Create Content Deliveries](#)

[Share Files with People in Lightning Experience](#)

File Updates in the Feed

Follow a file to see updates about the file in your feed, view a file's version history, and get file recommendations.

[Follow a File](#)

Follow a file to see updates in your Chatter feed, including when a new version of the file is uploaded. If you stop following a file, the file remains in your Files list, but you don't see updates about it in your feed anymore.

[View File Version History](#)

The file detail page and the Version History list give you access to lots of useful file actions and information.

[File Recommendations](#)

Chatter recommends popular files for you to follow. The number of people who have viewed or downloaded a file determines the file's popularity.

Follow a File

Follow a file to see updates in your Chatter feed, including when a new version of the file is uploaded. If you stop following a file, the file remains in your Files list, but you don't see updates about it in your feed anymore.

To start seeing updates, click **+ Follow**. To stop seeing updates, click **x Unfollow**. In Lightning Experience, follow a file from the file detail page. In Salesforce Classic, follow a file from a feed, file detail page, or files list.

 **Note:** The option to follow files is available only in organizations that use Chatter. Following a file does not send an email notification.

 **Important:** On private files, file metadata is not private. A user without permission to access a private file can nonetheless access the file's metadata. So, for example, through a private file's metadata, an unpermitted user can see who's following the private file.

SEE ALSO:

[Upload a New Version of a File](#)

View File Version History

The file detail page and the Version History list give you access to lots of useful file actions and information.

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

SEE ALSO:

[Upload a New Version of a File](#)

[Follow a File](#)

File Recommendations

Chatter recommends popular files for you to follow. The number of people who have viewed or downloaded a file determines the file's popularity.

To see an expanded list of your recommendations, click **More** in the Recommendations section. If no recommendations appear, then you already follow all the recommended files.

SEE ALSO:

[Follow a File](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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File Previews and Details

View and edit file details, and report on files.

[Preview Files and Edit File Details](#)

Preview a file to view it without downloading. View and update key details about a file from the File Details page.

[Remove a File from a Record](#)

Remove a file from a single record that the file's attached to. Unlike deleting a file, removing doesn't affect the file on other records or posts, and the file remains in Files home. To remove files from records, you must have at least collaborator access on the file.

[Delete a File from the File Detail Page](#)

When you delete a file from the file detail page, it is also removed from all locations where it's been shared.

[View Where a File Is Shared](#)

Find out who can see a file and their level of access. From the File Detail page, you can access a full list of every person or object the file is shared with.

[File and Content Engagement Report](#)

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

Preview Files and Edit File Details

Preview a file to view it without downloading. View and update key details about a file from the File Details page.

Preview a File

Clicking a file from Files Home or in a related list opens the File Previewer, which lets you view the file without downloading it. Use the arrow keys in the previewer to see each page, zoom in or out, or change the preview width and screen size. Files can be previewed by the file owner and anyone with access to the file.

Note:

- Only the first 500 pages of very large files are rendered in the preview.
- You can't preview files larger than 25 MB or 500 pages, unknown file types, password-protected files, and copy-protected PDFs.
- For files that you can't preview, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed.
- Some Microsoft Office 2007 features don't display correctly in previews.
- Some extended characters, such as ellipsis, and formatting can appear inconsistently in previews.
- If a file can be previewed, but a preview doesn't exist, contact your Salesforce admin to request to regenerate the preview.
- In the file previewer, the heading overlay menu disappears after 5 seconds of inactivity. Move the mouse or press tab to make the menu reappear.
- Previews for CMS images and files aren't visible in Firefox when the browser security is set to standard. This occurs because the standard Firefox security policy blocks third-party domain cookies. To preview CMS content set the security policy to custom and allow cookies.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

View and Edit File Details in Lightning Experience

Click View File Details from a file preview or from the actions menu on Files home, in the feed, or on a record. From the file details page, you can see key details about the file, including size, extension, and file owner. View or update the file title and description. View information about sharing and file versions.

To edit file details

- On a file detail page, click **Edit Details**
- Edit the title and description
- Click **Save**

File owners, collaborators, and users with the “Modify All Data” permission can edit file details. Admins can customize the page layout of the Files detail page. If you have a custom layout, you see it displays when you view or edit file details from the actions arrow on Files home, or when you edit file details from a file preview.

 **Note:** If you click Edit File Details from the files related list on a record, the default file detail page displays instead of the custom layout. To see the custom file detail page layout on a file attached to a record, click the file title to open the file preview, and then click **Edit File Details**.

View and Edit File Details in Salesforce Classic

- See if the file is private, privately shared, or shared with your company.
- Click **File Sharing Settings** to share a file with people, groups, or via file link; or to see the file’s Sharing Settings.
- Click **Make private** on the Sharing Settings dialog box to remove the file and file link, if applicable, from everywhere that it’s been shared. Or click **Restrict access** to remove the file from everywhere that it’s been shared except the library (only for files that originated in a Salesforce CRM Content library).

By default, anyone who can see a file can share it. Only owners and users with the “Modify all Data” permission can make a file private or restrict access.

Take Action

- Click **Download** to open or save the file.
- Click **Upload New Version** to update the file with a newer version.
- Click **Edit Details** to edit the name or description of the file.
- Click **Delete** to delete the file.
- Read the file description. Add a description by clicking **Add Description**, or click the edit icon to edit the description.

 **Note:** After you delete a file, it can remain cached for up to 90 days.

Anyone who can see a file can download it. Only file owners, collaborators, and users with the “Modify all Data” permission can upload a new version of a file or edit file details. Only file owners and users with the “Modify All Data” permission can delete files.

Get More Information

- See who owns the file and when it was last modified.
- See the file’s current version number and click **Show all versions** to see the file’s version history.
- Click **Show file report** to see data about the file, such as how many times the file has been downloaded, shared, liked, and commented on. **Show file report** is visible only to users with the “Run Reports” and “View Reports in Public Folders” permissions.
- Click **Follow** to follow the file, or click X to stop following the file.

- See who's following the file.
- See who the file is shared with.
- Click **Go to Content Detail Page** to see the content detail page of that file. Some actions performed on files that originated in Salesforce CRM Content must be taken on the file's content detail page rather than the file detail page.
- See other files that people who viewed this file also viewed.

SEE ALSO:

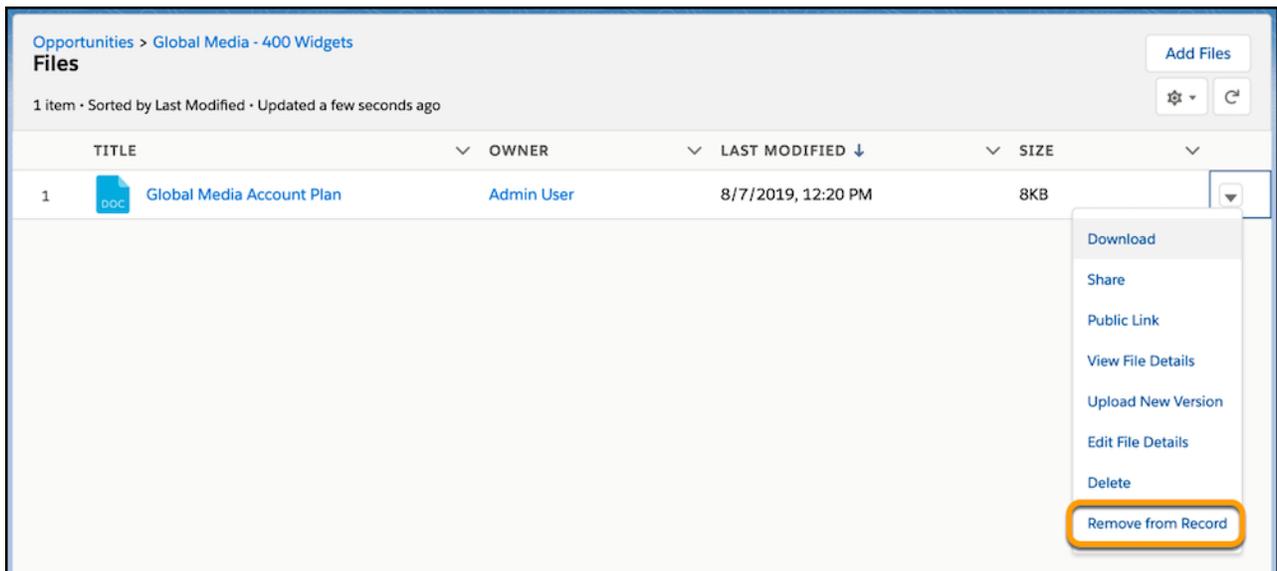
[View File Version History](#)

[View Where a File Is Shared](#)

Remove a File from a Record

Remove a file from a single record that the file's attached to. Unlike deleting a file, removing doesn't affect the file on other records or posts, and the file remains in Files home. To remove files from records, you must have at least collaborator access on the file.

On the record's Files related list, open the row-level action menu and choose **Remove from Record**.



SEE ALSO:

[Delete a File from the File Detail Page](#)

Delete a File from the File Detail Page

When you delete a file from the file detail page, it is also removed from all locations where it's been shared.

- To delete the file and remove it from all locations where it's been shared, click **Delete** on a file's detail page.
If the file was shared via link, anyone with the link no longer has access to the file after it's deleted. You can restore the file and all the shares that were associated with it by removing it from the Recycle Bin.

After you delete a file, it can remain cached for up to 90 days.

Only the file owner can delete a Salesforce file. A user with the Modify All Data permission can delete files that aren't associated with another file or object. If the file is contained in a library, only the file owner or a user with delete permission in the library can delete the file. The Library Administrator is one example of someone with delete permission in a library.

To learn who can perform which actions on a file, see [Who Can See My File?](#)

SEE ALSO:

[Delete Files and Links from Feeds](#)

[Remove a File from a Record](#)

View Where a File Is Shared

Find out who can see a file and their level of access. From the File Detail page, you can access a full list of every person or object the file is shared with.

The **Shared With** list on a file detail page shows you who the file is shared with and their level of access.

In Salesforce Classic, click **Show All** to open Sharing Settings, where you can:

- See who the file is shared with and their permission: owner, collaborator, viewer, or no access.
 - To share the file with specific people, click **People** on the Sharing Settings dialog box.
 - To share the file with specific groups, click **Groups** on the Sharing Settings dialog box.
 - To share the file with a library, click **Library**.
 - To create and share a link to the file, click **Anyone with link** on the Sharing Settings dialog box
 - To remove the file and file link, if applicable, from everywhere that it's been shared, click **Make private**.
 - If the file originated in a Salesforce CRM Content library, to remove the file from everywhere that it's been shared except the library, click **Restrict access**.
-  **Note:** Only owners and users with the "Modify all Data" permission can make a file private (🔒) or restrict access.
- To stop sharing the file with a person or a group, in the Sharing Settings dialog box, click **×** next to the person or group's name.

SEE ALSO:

[Make a File Private](#)

[Who Can See My File?](#)

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

EDITIONS

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File and Content Engagement Report

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

To run and view the File and Content Engagement report, go to the file detail page, and click  **Show file report**. The report shows information for these fields.

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

 **Example:** Numbers in the File and Content Engagement report combine the counts of all versions of a file. For example, let's say there are 2 versions of the file. Version A has been downloaded 4 times, and version B has been downloaded 5 times. The `Total Downloads` reports 9 downloads.

Enable Salesforce Files Settings For Managed Packages

To avoid an exception error while installing the managed package, enable the Skip triggers execution and validation rules on asset files setting.

1. From Setup, enter `Salesforce Files` in the Quick Find box, then select **General Settings**.
2. Click **Edit**.
3. Select **Skip triggers execution when deploying asset files** and **Skip triggers execution and validation rules on asset files**.
4. Save your changes.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To run and view a file report

- Run Reports

EDITIONS

Available in: both Salesforce Classic (**not available in all orgs**) and Lightning Experience

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

Files Connect External Files

Browse, search, and share external files right from Salesforce.

[Authenticate to Files Connect External Data Sources](#)

If your administrator configured a data source like SharePoint to use per-user authentication, you can provide your credentials for that system in Salesforce.

[Access and Share Files Connect External Files](#)

After your admin enables Files Connect, you can access files from external sources, like Google Drive and SharePoint, or share them through feeds and Files home.

[Search for Files Connect External Files](#)

Search an external data source, like Google Drive, Box, or SharePoint, right within Salesforce.

Authenticate to Files Connect External Data Sources

If your administrator configured a data source like SharePoint to use per-user authentication, you can provide your credentials for that system in Salesforce.

[Set Up Authentication to an External Data Source](#)

When you connect to a Files Connect external data system for the first time, you can set up your authentication in just a few clicks.

[Manage Your Files Connect External Data Source Authentication Credentials](#)

You or your Salesforce admin can use Files Connect to set up and manage your authentication settings for external data sources. With valid authentication settings, you can access files from external systems right from Salesforce.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access cloud-based data sources like SharePoint Online:

- Files Connect Cloud

Set Up Authentication to an External Data Source

When you connect to a Files Connect external data system for the first time, you can set up your authentication in just a few clicks.

If you haven't set up your authentication to an external data system in My Settings, you're prompted to authenticate the first time you try to access an external system in Salesforce. Click the link or button to complete most of the authentication automatically.

- If you are connecting to Box, Google Drive, SharePoint Online, or OneDrive for Business: Select **OAuth 2.0** as the authentication protocol.
- When you see a message requesting permission for Salesforce to access information from your external system, click **Allow**.
- After the authentication process has finished, you are redirected to Salesforce.

Manage Your Files Connect External Data Source Authentication Credentials

You or your Salesforce admin can use Files Connect to set up and manage your authentication settings for external data sources. With valid authentication settings, you can access files from external systems right from Salesforce.

Your admin defines external systems in external data sources and named credentials. Before you begin, your administrator:

- Sets up the external data source or named credential to use per-user authentication.
- Grants you access to the external data source or named credential.
- Tells you the authentication settings to enter.

If you don't see the expected settings or options, ask your admin for help.

1. From My Settings, enter *Authentication* in the **Quick Find** box, then select **Authentication Settings for External Systems**.
2. To set up a new connection, click **New**. To modify an existing external data source, click **Edit**.
3. From the **External System Definition** menu, select "External Data Source."
4. From the **External Data Source** menu, select a data source that your administrator created.
5. Set the options for the authentication protocol required by Box, Google Drive, SharePoint Online, or OneDrive for Business.

Authentication Protocol Choose **OAuth 2.0**

Authentication Provider Choose the provider that your administrator created for this data source

Scope Leave blank

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To access cloud-based data sources like SharePoint Online:

- Files Connect Cloud

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To access cloud-based data sources like SharePoint Online:

- Files Connect Cloud

Start Authentication Flow on Save

Select to immediately verify your login credentials with the external data source.

When you click **Save**, the external system prompts you to log in. After successful login, the external system grants you an OAuth token for accessing its data from this org.

Redo the OAuth flow when you need a new token—for example, when the token expires—or if you edit the Scope or Authentication Provider fields.

6. Click **Save**.

Access and Share Files Connect External Files

After your admin enables Files Connect, you can access files from external sources, like Google Drive and SharePoint, or share them through feeds and Files home.

Download or Share Files on Files Home

Download external files to your local system or share them with a set of people in your org from Files home.

1. Navigate to Files home.
2. The External Files list in the left column shows available external data sources. Select one and navigate through the folders, or use the search bar to find a file.



Note:

- Salesforce supports Google documents, spreadsheets, presentations, and drawings. In the Recent list, Google Drive content is limited to the 24 most recently accessed documents from the last 30 days.
- SharePoint folders with special characters, such as # or %, appear in the list, but you can't see or access any files in them.

3. Click  next to the file name, and choose one of the following:

- **Open** the file in the external data source, such as SharePoint.
- **Download** the file to your local system.
- **Share** the file either as a copy or as a reference. Your admin has determined which type of sharing is used in your org. When sharing, you do one of the following:
 - **Share a copy** of the external file stored in Salesforce. If files are shared with a Chatter group, all group members can access the files, even if members lack access to the external system. Salesforce Files doesn't reflect any revisions to the file in external systems.
 - **Share a reference** to the external file stored outside Salesforce. Only users with access to the external system can download files. (Users must enter credentials for the system in the Authentication Settings for External Systems section of personal setup). Salesforce Files doesn't reflect revisions to the file in external systems, but the reference points to the latest file version in those systems.



Note: To download files referenced from an external system, users must enter credentials for the system in the Authentication Settings for External Systems section of personal setup.

When a user selects an external file from the file selector, a file reference or copy is created in Salesforce. If a file reference exists, it's reused.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To access cloud-based data sources like SharePoint Online:

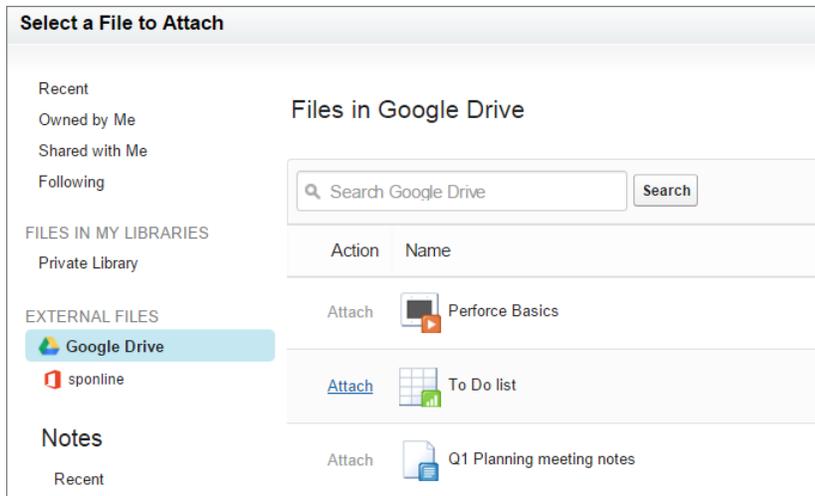
- Files Connect Cloud

Share Files in the Feed

If you want to include external files in a specific Chatter conversation, use the feed. All files shared in the feed are either copies or references, as determined by your admin.

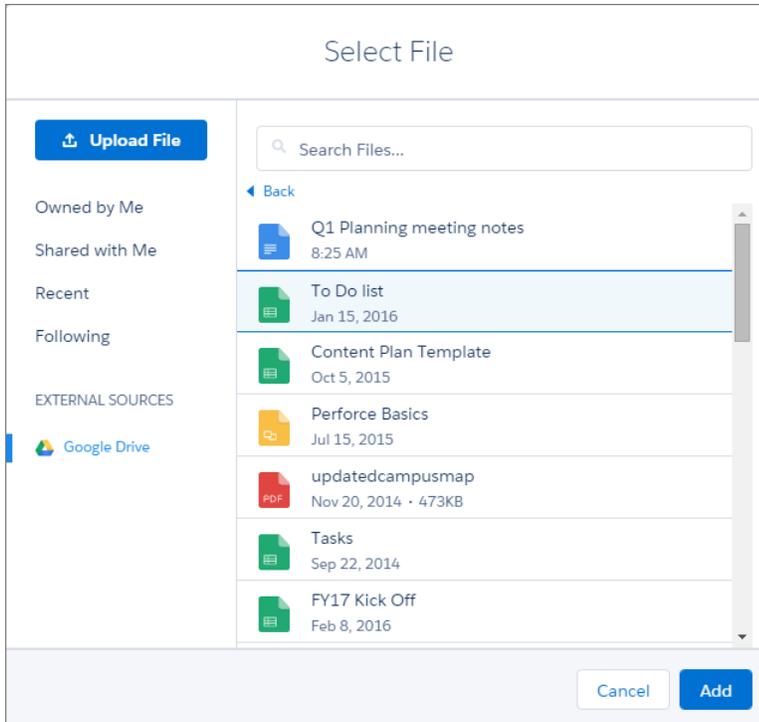
In Salesforce Classic

1. While authoring a post, click **File** above the feed, and then click **Select a file from Salesforce**.
2. In the left column, click the external source, such as SharePoint.
3. Next to the file you want to share, click **Attach**.
4. In the body of your post, @mention the groups or people you want to share with.

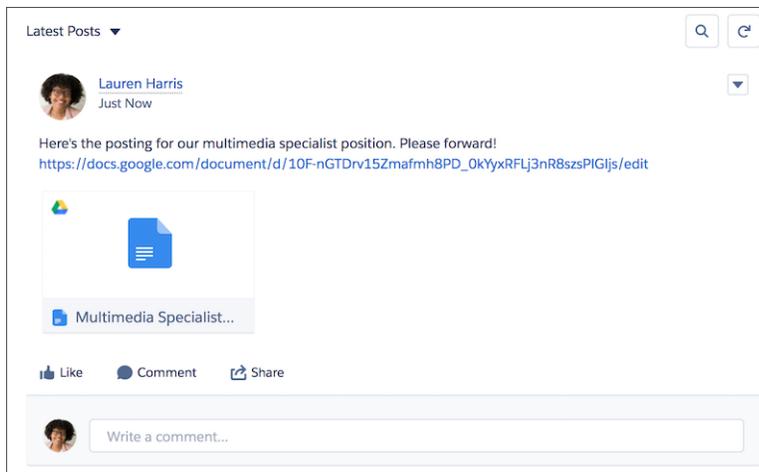


In Lightning Experience

1. While authoring a post, click the paperclip icon below the post to open the Select File window.
2. From the left column, click the external source, such as SharePoint or Google Drive.
3. Select the file you want to share, and click **Add**.
4. In the body of your post, @mention groups or people that you want to share with.



When you paste a link to an external document into a Chatter post, it's converted into a Files Connect file reference. Under the body of your post, the file title and icon appear. Click the icon to open the file preview right from your feed. A file reference is created for the first link in each post. File references are not created for links in comments.



 **Note:** File previews are only available for files connected through Sharepoint, Google Drive, and Quip integrations.

SEE ALSO:

- [Share Files with People in Salesforce Classic](#)
- [Share Files with Groups](#)
- [Share Files with Libraries in Salesforce Classic](#)

Search for Files Connect External Files

Search an external data source, like Google Drive, Box, or SharePoint, right within Salesforce.

Search in a Specific External Data Source

In Salesforce Classic:

1. From the left column of Files home or your Chatter feed, click the data source name.
2. In the search box, enter terms such as *document title* or *author*. (The specific information that you can search for depends on the configuration of the external data source.)



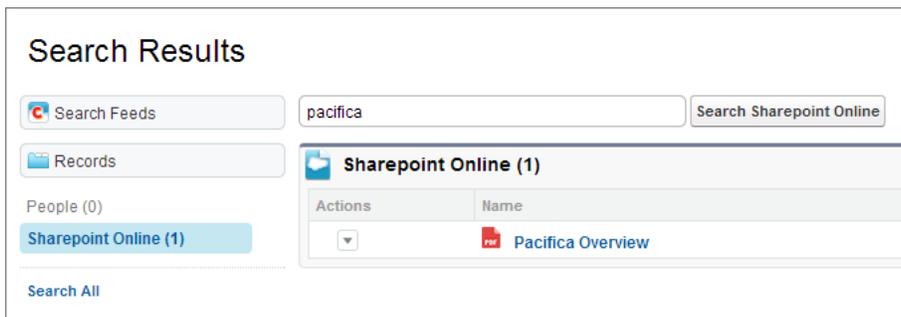
-  **Note:** You can also search external data sources from the file selector when attaching a file to a Chatter post. In Salesforce Classic, click **File** above the feed, and then select a file from Salesforce. In Lightning Experience, click the paperclip icon below the post to open the Select File window.

Search Globally for Salesforce and External Data

If your administrator enables global search for an external data source, you can search its contents along with your Salesforce data.

In Salesforce Classic:

1. In the global search box at the top of the Salesforce window, enter your search terms.
2. To filter the results down to a specific external data source, click its name in the left column (for example, "SharePoint Online").



-  **Tip:** If you often want to see content from a specific external data source, pin it to the top of global search results. To pin it, in the left column, hover over the data source name, and click the pin icon. (If you don't see the data source listed, click Search All.)

In Lightning Experience:

1. From Files home, enter a search term into the global search box in the header.
2. Optionally, filter your search results to return only Files.
 - Select **in Files** after entering your search in the global search box.
 - Do a global search and then select **Files** from the global search results.
 - Select **Files** from the global search Suggested For You menu, and then enter your search term.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To access cloud-based data sources like SharePoint Online:

- Files Connect Cloud

Document Libraries

Store files without attaching them to records.

[Document Library Overview](#)

Each document that is stored in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

[Documents Home](#)

Click the Documents tab to display the documents home page. If the Documents tab is not visible, you can customize your display to show it. The Documents tab is not part of Salesforce CRM Content.

[View Document Lists](#)

The documents list page displays a list of documents in a selected folder. From this page, you can view detailed document information or manipulate the document.

[Upload and Replace Items on the Documents Tab](#)

You can store documents and images on the Documents tab without attaching them to records. You can then use these items in your Salesforce org, such as when creating an email template.

[Search for Documents](#)

Searching returns a list of documents that match all your search terms. Search results are listed in order of the closest matches.

[Delete Documents](#)

When you delete a document, Salesforce stores it in the Recycle Bin.

[Moving Documents to Salesforce Files](#)

As you make the move to Lightning Experience, you may have questions about the files you have stored in the Documents tab in Salesforce Classic.

[Document Properties](#)

The documents you upload through Chatter have a set of properties that you can see and interact with.

Document Library Overview

Each document that is stored in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

Document libraries store documents that aren't attached to records. Access your library documents via the Documents tab. If your Documents tab is not visible, customize your display to show it.

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

SEE ALSO:

[Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#)

EDITIONS

Available in: **Salesforce Classic**

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

Documents Home

Click the Documents tab to display the documents home page. If the Documents tab is not visible, you can customize your display to show it. The Documents tab is not part of Salesforce CRM Content.

- Under **Find a Document**, enter keywords to search for a document.
- In the **Document Folders** section, select a folder to view all the documents contained in that folder.
- The **Recent Documents** section displays the last ten or twenty-five documents you viewed, with the most recently-viewed document listed first. This list is derived from your recent items and includes records owned by you and other users. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display.
- In the **Recent Documents** section, click **New** to upload a new document.

View Document Lists

The documents list page displays a list of documents in a selected folder. From this page, you can view detailed document information or manipulate the document.

- Click the document name to [view the document properties](#).
- Click **Edit** next to a document to [edit the document properties](#).
- Click **Del** to [move the document to the Recycle Bin](#).
- Click **View** to open the file in its associated application. If a file type is not recognized or the application is not loaded on your machine, Salesforce displays a standard download dialog prompting you to choose a save option.
- Choose a folder to view a list of documents stored in that folder.
- Click any column heading to sort the documents in ascending or descending order by the information in that column.
- At the top of the list, click a letter to display the contents of the sorted column that begin with that character.
- Click **Next Page** or **Previous Page** to go to the next or previous set of documents.
- At the bottom of the document list, select **fewer** or **more** to view a shorter or longer display list.
- Click **Printable View** to display the current list view in a format that is ready for printing.

 **Note:** If you can't find a document, you may not have access to the folder that contains it.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view Documents tab:

- Read on documents

To view documents:

- Read on documents

To upload new documents:

- Create on documents

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To view documents:

- Read on documents

To change document properties:

- Edit on documents

To replace documents:

- Edit on documents

To delete documents:

- Delete on documents

Upload and Replace Items on the Documents Tab

You can store documents and images on the Documents tab without attaching them to records. You can then use these items in your Salesforce org, such as when creating an email template.

Upload a New Document

1. On the Documents tab, click **New Document**, or on the documents home page, click **New** next to Recent Documents. If you do not have a New Document option, check if you have the correct permissions.
2. On the Upload New Document page, specify a descriptive document name. If you want to use the file name, leave this field blank. The file name appears when you upload the file.
3. If you have the “Customize Application” permission, enter a unique name to be used by the API and managed packages.
4. Select one of the following.
 - `Indicate Document is Internal`: When checked, a flag is added to the document indicating that document viewers should not share the file outside of the organization.
 -  **Note:** Checking this box does not expressly enforce any security rules.
 - `Externally Available Image` if the document is an image, such as a logo, that's not confidential. Check this box to:
 - Make the image available from HTML email templates without requiring a Salesforce username and password
 - Use the image as a custom tab icon or custom app logo, which do require a Salesforce username and password to view
 - Display the image as a custom logo in meeting requests

The `Indicate Document is Internal` and `Externally Available Image` checkboxes are mutually exclusive; you cannot select both.
5. Select a folder for the document.
6. Enter a description to use later as search criteria.
7. Enter keywords that you can use later as search criteria.
8. Select a document or path option.
 - To upload a document, click **Browse**, choose the file, and click **Open**.
 - To store a link to the document, enter the location of the document. Enter a path and file name or a URL such as:
C:\Quotes\quote.doc, \\Server\Departments\Marketing\logo.doc, or <https://salesforce.com>.
9. Click **Save**.
 -  **Note:** To refer to this document using its URL, right-click the image and copy its URL address. When you use the URL, you reference the copy of the image on the Salesforce server.

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

USER PERMISSIONS

To upload new documents:

- Create on documents

To replace documents:

- Edit on documents

Replace a Document

1. Display the document you want to replace. For instructions on locating a document in the document library, see [Search for Documents](#).
2. Click **Replace Document**.
3. Select a document or path option.
 - To upload a replacement, click **Browse**, choose the file, and click **Open**.

- To store a link to the replacement, enter the location of the replacement. Enter a path and file name or a URL such as:
C:\Quotes\quote.doc, \\Server\Departments\Marketing\logo.doc, or https://salesforce.com.

4. Click **Replace Document**.

Tips for Uploading or Replacing Documents

- Documents stored as links cannot be attached to emails, but they save space in your document library.
- If your administrator enables document content search, Salesforce also performs a full-text search of the document. When a new document is uploaded or an old one is replaced, its contents are available for searches.
- Salesforce stores the most recent upload date as the modified date.
- You can upload documents that have file names of up to 255 characters, including the extension.
- The size limit for any document you upload is 255 characters. The maximum size for a custom-app logo is 20 KB.
- Your organization's used file storage includes all files stored in the document library.
- If the `Don't allow HTML uploads as attachments or document records` security setting is enabled for your organization, you cannot upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`, `.svg`.

Search for Documents

Searching returns a list of documents that match all your search terms. Search results are listed in order of the closest matches.

To find specific documents, use the **Find Document** button on the documents home page.

1. Click the Documents tab.
2. Enter your search terms. Salesforce searches the following fields:
 - Document Name
 - Keywords
 - Description

3. Click **Find Document**.

The `Keywords` and `Document Name` fields are used to determine the closest matches. The fields you see are predefined and can't be changed.

-  **Tip:** To search for a phrase, use quotation marks around the words. For example, a search for "my logos" returns documents whose fields or content contains that exact phrase, and ones that contain *my* and *logos*. Without quotation marks, your search returns all documents that include any of the words in the search. For example, *my logos* returns documents whose fields or content contains *my* and *logos*.

4. To go to the detail page for a document, select the document or click **View**.

If your administrator enables document content search, Salesforce also performs a full-text search of the document. When a new document is uploaded or an old one is replaced, its contents are available for searches.

-  **Note:** Salesforce automatically determines if the contents of a document can be searched. If the `Document Content Searchable` property is checked on a document, then its contents have been processed successfully and can be searched. If your document is large, it may take several minutes before Salesforce searches the contents of a document and marks the `Document Content Searchable` property.

You can also find documents using global search.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view documents:

- Read on documents

1. Enter your search terms in the header search box.
2. Select **Search Options...** from the dropdown and select `Documents` to narrow your search results.
3. Click **Search**.

The following file types are supported for a document content search.

 **Note:** The contents of documents that exceed the maximum sizes are not searched; however, the document fields are still searched. Only the first 1,000,000 characters of text are searched. Text beyond this limit is not included in the search.

File Type	File Extensions	Maximum Size
HTML (only the text within a <code><body></code> tag)	<code>.htm</code> , <code>.html</code> , <code>.xhtml</code>	5 MB
PDF	<code>.pdf</code>	25 MB
PPT	<code>.pot</code> , <code>.pps</code> , <code>.ppt</code>	25 MB
RTF	<code>.rtf</code>	5 MB
Text	<code>.c</code> , <code>.cpp</code> , <code>.css.csv</code> , <code>.ini</code> , <code>.java</code> , <code>.log</code> , <code>.sql</code> , <code>.txt</code>	5 MB
Word	<code>.doc</code> , <code>.dot</code>	25 MB
XLS	<code>.xls</code> , <code>.xlt</code>	5 MB, or a maximum cell limit of 100,000 cells
XML	<code>.xml</code>	5 MB

In some instances documents aren't searched. For example:

- If a file extension is changed to a different format, it isn't searched, even if both extensions are valid. For example, a `.txt` file that is renamed to `.rtf` isn't searched.
- PDF and Word documents may have security restrictions that prevent them from being searched. To ensure that the content is searchable, set the "content extraction" property on your file to "Enabled" when creating your document.

SEE ALSO:

[Search for Files](#)

Delete Documents

When you delete a document, Salesforce stores it in the Recycle Bin.

- To delete a document, click **Del** next to the document on the documents list page. Alternatively, click **Delete** on the documents detail page.

You can restore the document to your document library within that time by clicking **Undo** from the Recycle Bin.

- You can delete any document in your personal folder and folders with “Public Folder Access” set to “Read/Write.” To delete a document in a public folder with “Public Folder Access” set to “Read Only,” you need “Manage Public Documents” permissions.
- If you delete a document that’s included in a letterhead or HTML email template, emails using the letterhead or template display a broken link. You can fix the broken link by removing the document from the Recycle Bin.
- You can’t delete a document that’s being used as a custom logo in meeting requests. To delete it, you must either select another document to use as a logo or uncheck the option to display a custom logo in meeting requests.

Moving Documents to Salesforce Files

As you make the move to Lightning Experience, you may have questions about the files you have stored in the Documents tab in Salesforce Classic.

Can I See the Files in the Documents Tab in Salesforce Classic in Lightning Experience?

The Documents tab isn’t available in Lightning Experience, but your document files aren’t going away. In fact, some features continue to rely on files in your Documents tab, like email templates. Don’t delete these documents. Take this opportunity to add your working files and images as Salesforce Files so they’re usable in Lightning Experience.

How Do I Work with My Documents in Lightning Experience?

Lightning Experience uses Salesforce Files to manage and collaborate on files. Salesforce Files unifies various content types to streamline and improve your experience: they can be stored privately, shared to libraries and groups, and updated with version history.

How Do I Move Files from the Documents Tab into Lightning Experience?

While there isn’t a one-click solution, you do have some options once you identify the files in the Documents tab that you want to use in Lightning Experience and your communities.

1. Export documents in the weekly export, and then upload the documents into Salesforce Files.
2. Use a third-party data export tool from the AppExchange.
3. Use an API-based tool (Connect REST API supports uploading asset files).

Salesforce Files are the best way to save, organize, and share files in Salesforce. Salesforce Files continue to see improvements, so move your documents to Salesforce Files now and start taking advantage of them.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To delete documents:

- Delete on documents

To restore documents:

- Delete on documents

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Document Properties

The documents you upload through Chatter have a set of properties that you can see and interact with.

[Display and Edit Document Properties](#)

Display detailed document information and update document properties.

[Document Properties](#)

a description of the properties in alphabetical order that are stored for each document in the document library.

[Change Document Authors](#)

Since documents are stored in folders that control user access, documents do not have owners like other types of records, but they do have authors. The author represents the user that originally uploaded the document file.

Display and Edit Document Properties

USER PERMISSIONS

To view documents:	Read on documents
To update properties:	Edit on documents
To replace documents:	Edit on documents
To move documents:	Edit on documents
To delete documents:	Delete on documents

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Display detailed document information and update document properties.

- To display a document, locate the document on the documents home or list pages, then click the document name to display detailed information.
- To update [document properties](#), click **Edit**.
- To [replace a document with an updated version](#), click **Replace Document**.
- To email a document to a contact, click **Email Document**, fill in the details of the email, and click **Send**. The document is sent as an attachment to the email and is logged in the Activity History for the contact. Documents that reference URLs rather than physical files cannot be emailed. For a document that is an image embedded in an HTML email template, such as a logo in a letterhead, make sure the document is marked as `Externally Available` on the Documents tab so that a user who does not have a Salesforce username and password can view the image when it is received in an email.
- To search for a document, enter search terms and click **Find Document**. A list of documents that match your search terms displays. You can search for terms using the following fields:
 - Document Name
 - Keywords
 - Description
- To make a document's content searchable, check `Document Content Searchable`
- To view all the documents in a folder, click the folder name.
- To store a document in a different folder, click **Edit**, choose a new folder, and click **Save**.
- Deleting Documents - To [delete a document](#), click **Delete**.

Document Properties

a description of the properties in alphabetical order that are stored for each document in the document library.

Field	Description
Author	The main point of contact for a document. Initially, the person uploading the document is the author. Thereafter, the author can be any selected user.
Created By	The name of the person who originally uploaded the file.
Modified By	The name of the person who last uploaded the file.
Folder	The name of the folder that contains the document.
Document Content Searchable	A checkbox that indicates if the content within a document can be searched via the Find Document button on the Documents tab. This checkbox is automatically set by Salesforce.
Document Name	The name of the document including its file extension.
Document Unique Name	A unique name used to refer to the document when using the Lightning Platform API. In managed packages, this name prevents naming conflicts on package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With this field, a developer can change certain components' names or titles in a managed package and the changes are reflected in a subscriber's organization.
Description	A statement distinguishing this document from others.
Indicate Document is Internal	A checkbox that adds a flag to the document indicating that document viewers should not share the file outside of the organization. Checking this box does not expressly enforce any security rules. The <code>Indicate Document is Internal</code> and <code>Externally</code>

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Field	Description
	Available Image checkboxes are mutually exclusive; you cannot select both.
Externally Available Image	<p>A checkbox that indicates if the document is an image available for HTML email templates, such as a logo in a letterhead, and does not require a Salesforce username and password to view in an email.</p> <p>This checkbox indicates if the document is an image used as a custom app logo or custom tab icon, which require a Salesforce username and password to view.</p> <p>The Indicate Document is Internal and Externally Available Image checkboxes are mutually exclusive; you cannot select both.</p>
Keywords	An open text field containing one or more words that describe the document. The program checks for matches in this field when doing a search.
Path	Stored in place of Document Name if you prefer to create a link to the document instead of uploading it.
Size	The size of the document in bytes.
Type	The file type is determined by the file extension. For example, filename.ppt is recognized as a PowerPoint file. If the Don't allow HTML uploads as attachments or document records security setting is enabled for your organization, you cannot upload files with the following file extensions: .htm, .html, .htt, .htx, .mhtml, .mhtml, .shtml, .shtml, .acgi, .svg.

Change Document Authors

Since documents are stored in folders that control user access, documents do not have owners like other types of records, but they do have authors. The author represents the user that originally uploaded the document file.

To change the author of a document:

1. View the document you want to modify.
2. Click **Change** next to the Author field.

The **Change** link displays only on the detail page, not the edit page. If you do not see the **Change** link, you may not have sufficient privileges to change a document author.

3. Enter a new author name. Alternatively, click the lookup icon to choose from a list of users.
4. Check the Send Notification Email box if you would like to alert the new author of this change.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To change documents:

- Edit on documents

 **Note:** When you change document authorship, Salesforce does not change the document's visibility.

Salesforce CRM Content

Organize, share, search, and manage all types of files within your organization.

[Salesforce CRM Content Overview](#)

Organize, share, search, and manage content within your organization and across key areas of Salesforce with Salesforce CRM Content. Content includes all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

[Contribute Content](#)

Contribute Content to your organization. Publish and upload files and Web links.

[Search and Find Content](#)

The Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content libraries. If your organization has Salesforce CRM Content enabled, you can take advantage of Salesforce CRM Content functionality on detail pages for leads, accounts, contacts, opportunities, products, cases, or custom objects.

[View and Edit Libraries](#)

When you have located a Salesforce CRM Content library in the My Libraries area of the Libraries tab home page or on a content details page, click the library name to display detailed information.

[Manage Libraries](#)

On the Libraries tab, access your private library, create libraries, choose libraries to view or edit, and analyze library usage and activity.

[Deliver Content](#)

Use *content delivery* to convert documents into an optimized web-based version for easy online viewing.

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM Content Overview

Organize, share, search, and manage content within your organization and across key areas of Salesforce with Salesforce CRM Content. Content includes all file types, from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

To learn the different ways files are used in Salesforce, see [Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#).

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

Organizing

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

EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

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

Searching

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

Subscribing

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

Previewing

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

Contributing

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

Reviewing Usage and Providing Feedback

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

Sharing Content in Salesforce

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

SEE ALSO:

[Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#)

Contribute Content

Contribute Content to your organization. Publish and upload files and Web links.

[Publish Files to Libraries](#)

To publish files to libraries you can upload them from your computer, contribute them from your private library to a shared library, or share them from Chatter.

[Upload and Publish Content](#)

Add files to libraries to take advantage of the permission setting and content delivery capabilities of Salesforce CRM Content.

[Salesforce CRM Content Limits](#)

Limits for features and search of Salesforce CRM content.

[Contribute Web Links to Salesforce CRM Content](#)

Classify and publish a Web link in Salesforce CRM Content.

[Update Content Versions](#)

Clicking a file name on any Salesforce CRM Content tab opens the content details page.

[Delete, Archive, and Restore Content](#)

There are two methods for removing content from libraries: archiving and deleting.

Publish Files to Libraries

To publish files to libraries you can upload them from your computer, contribute them from your private library to a shared library, or share them from Chatter.

1. On the **Libraries** tab, do one of the following:
 - To upload a file, click **Contribute** and choose a file from your local drive.
 - To publish files from your private library, click the **My Private Files** tab, select one or multiple files, and click **Publish Selected**.

Or, to share files from Chatter with a library, see [Share Files with Libraries](#) on page 186 (and skip the rest of these steps).

2. Enter a title for each file. Optionally, enter descriptions.

 **Note:** If you download multiple content files, file names that include special characters change to that file's version ID in the .zip file.

3. If you add a file that you uploaded, choose either **Save in my private library** or **Publish to a shared library**. If you choose the second option, select a library. The selected library becomes the managing (home) library. You can share content in the managing library with another library but only if it is revised by a user with author permissions in the managing library.
4. Optionally, choose a language. If multi-language support is enabled, the **Language** dropdown list is displayed. If you do not choose a language, Salesforce associates your content with your personal language setting. If users restrict their content searches to a particular language, only content associated with that language is displayed in the search result set.
5. To publish the content on behalf of another author, choose that author from the dropdown list.
6. Tag your content. Your tagging permission depends on the tagging rule assigned to the library:
 - If the library does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the **Tags** field. As you type a tag, Salesforce CRM Content autosuggests tags based on your My Recent Tags list and the Popular Tags section on the Libraries tab. The My Recent Tags list on the Contribute window shows the 20 tags that you used most recently. To add a tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. To add a suggested tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag, it turns green.
 - You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To upload and publish files to a public library:

- **Manage Libraries** checked in your library permission definition

OR

Add Content checked in your library permission definition

To upload and save files to a private library:

- **None**

- Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.
7. If multiple record types are available, choose one from the dropdown list. The record type determines which custom fields appear for you to categorize and define your content.
 8. After completing the custom fields, click **Publish** or **Save**.

 **Note:**

- Unique values in custom fields that are set for the first version of a file aren't included if you upload a new version. You can set the unique values in the new version as long as they aren't the same as a previous version.
- Files published to a shared library are added to your Files tab and available to other Chatter users in your organization. Files published to your private library are added to your Files tab, but are private and not shared with anyone. For information about the different file tools and solutions in Salesforce, see [Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#).
- Contact Manager, Group, Professional, Enterprise, Unlimited, and Performance Edition customers can publish a maximum of 200,000 new versions per 24-hour period. Developer Edition and trial users can publish a maximum of 2,500 new versions per 24-hour period.

Upload and Publish Content

Add files to libraries to take advantage of the permission setting and content delivery capabilities of Salesforce CRM Content.

The Libraries tab has several publishing-related options at the top of the page that let you upload, classify, and publish files, Web links, and Google docs in Salesforce CRM Content.

 **Note:** The **Add Google Doc** button on the **Libraries** tab is available only if your Salesforce admin has enabled the Add Google Doc to Salesforce service.

To publish files, Web links, and Google docs in Salesforce CRM Content refer to the following topics:

- [Publish Files to Libraries](#)
- [Contribute Web Links to Salesforce CRM Content](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To upload and publish files and Web links:

- **Manage Libraries** checked in your library permission definition

OR

Add Content checked in your library permission definition

To publish Google docs:

- Google Apps account

Salesforce CRM Content Limits

Limits for features and search of Salesforce CRM content.

Salesforce CRM Content Limits

Feature	Details
Content deliveries: default delivery bandwidth per rolling 24-hour window	50 GB
Content deliveries: default delivery view counts per rolling 24-hour window	50,000
Content deliveries: maximum file size for online viewing	25 MB
Content: maximum file size	<ul style="list-style-type: none"> • 2 GB • 2 GB (including headers) when uploaded via Connect REST API • 2 GB (including headers) when uploaded via REST API • 38 MB when uploaded via SOAP API • 10 MB when uploaded via Bulk API • 150 MB when uploaded via Bulk API 2.0 • 10 MB when uploaded via Visualforce
Content: maximum number of libraries	2,000
Content: maximum number of files	30,000,000
Content: maximum number of files and versions in a 24-hour period (adjustable)	200,000 (2,500 in Developer Edition and sandboxes)
Content packs: maximum number of files	50 (N/A in Personal Edition)
Documents: maximum size of custom app logo	20 KB
Documents: maximum size of document to upload	5 MB
Documents: maximum file name size (including file extension name)	255 characters

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Salesforce CRM Content Search Limits

Search supports several file types and has file size limits. If a file exceeds the maximum size, the file's content isn't searched, but the file's author name, tags, file extension, and custom fields are.

SEE ALSO:

[File Size and Sharing Limits](#)

Contribute Web Links to Salesforce CRM Content

Classify and publish a Web link in Salesforce CRM Content.

1. Click the **Libraries** tab.
2. To add a link, click **Contribute** > **Do you want to link to a website instead?**, then enter the URL, and click **Contribute**. To publish a link that is already in your private library, click the **My Private Files** tab, locate the link, and click **Publish**.
3. Assign a title and description to your Web link.
4. Choose a library. This library becomes the managing (home) library, meaning that the Web link can be shared with another library but its content details page can only be edited by a user with relevant permissions in the managing library. If you do not want the link to be visible to other users in your organization, choose **Save in my private library**.
5. Optionally, choose a language. If multi-language support is enabled, the **Language** dropdown list is displayed. If you do not choose a language, Salesforce associates your content with your personal language setting. If users restrict their content searches to a particular language, only content associated with that language is displayed in the search result set.
6. To publish the content on behalf of another author, choose that author from the dropdown list.
7. Tag your content. Your tagging permission depends on the tagging rule assigned to the library:
 - If the library does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the **Tags** field. As you type a tag, Salesforce CRM Content autosuggests tags based on your My Recent Tags list and the Popular Tags section on the Libraries tab. The My Recent Tags list on the Contribute window shows the 20 tags that you used most recently. To add a tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. To add a suggested tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag, it turns green.
 - You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.
 - Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.
8. If multiple record types are available, choose one from the dropdown list. The record type determines which custom fields appear for you to categorize and define your content.
9. After completing the custom fields, click **Publish** or **Save**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To publish Web links in Salesforce CRM Content:

- **Manage Libraries** checked in your library permission definition

OR

Add Content checked in your library permission definition

Update Content Versions

Clicking a file name on any Salesforce CRM Content tab opens the content details page.

To publish a new version of the file and update its properties:

1. Click **Edit > Upload New Version**. This option does not appear for Web links or Google docs.
2. Click **Browse** to find and select the updated file.
3. As needed, update the **Title** and **Description** fields.
4. Fill out the **Reason for change** field. This text is included on the email notifications sent to subscribers and the version list on the content details page.
5. To publish the content on behalf of another author, choose that author from the dropdown list.
6. Tag your content. Your tagging permission depends on the tagging rule assigned to the library:
 - If the library does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the **Tags** field. As you type a tag, Salesforce CRM Content autosuggests tags based on your My Recent Tags list and the Popular Tags section on the Libraries tab. The My Recent Tags list on the Contribute window shows the 20 tags that you used most recently. To add a tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. To add a suggested tag, click it to automatically add it to the **Tags** field.
 - If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag, it turns green.
 - You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.
 - Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.
7. Update any custom fields as needed.
8. Click **Publish**.

Consider this information when creating or modifying a new version.

- You can't edit a file within Salesforce CRM Content. To edit a file, download it from Salesforce CRM Content to your computer, make your changes, then upload the updated version using the **Upload New Version** button.
- The Versions subtab on the content details page lists all content versions. The Recent Activity list on the Libraries tab also notifies users of new content versions.
- Contact Manager, Group, Professional, Enterprise, Unlimited, and Performance Edition customers can publish a maximum of 200,000 new versions per 24-hour period. Developer Edition and trial users can publish a maximum of 2,500 new versions per 24-hour period.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To add a version:

- **Add Content** checked in your library permission definition

Delete, Archive, and Restore Content

There are two methods for removing content from libraries: archiving and deleting.

Archiving lets you continue to store files in Salesforce without them being in a library or exposed in search results. Deleting files moves them to the **Recycle Bin**, where files remain for 15 days before being permanently, automatically deleted. Within 15 days of deleting a file, you can restore it from the **Recycle Bin**. You can also restore archived files.

Before you delete or archive content, it's important to know what's similar and different about these two methods:

Effects of Archiving or Deleting Content	Archived Content	Deleted Content
Counts towards file storage limits (storage size as well as number of documents)	✓	
Removed from libraries	✓	✓
New versions can no longer be uploaded	✓	✓
Content can't be downloaded (unless deleted content is restored within 15 days)		✓
Content no longer appears in search results	✓	✓
Content can be restored	✓	✓
Automatically removed from subscription lists (without notifying subscribers)	✓	✓
Permanently deleted by emptying Recycle Bin		✓

To archive or delete content files:

1. On the **Libraries, Content**, or **Subscriptions** tab, click the name of the file you want to remove.
2. On the **Content Details** page, click **Edit > Archive Content** or **Edit > Delete Content**.

To delete files in content packs:

- By default, you must first delete the content pack, and then delete the file.
- If your admin has enabled the Salesforce CRM Content setting that allows files to be deleted from content packs, you can delete a file without having to first remove it from a content pack. This removes all versions of that file from all content packs, including content packs you don't have access to, like those in Private Libraries.

To restore archived content files:

1. Do one of the following to open the **Content Details** page for an archived file:
 - Follow a bookmark to the archived content.
 - On the **Libraries** tab, click a library name to open the **Library Details** page. Click the **View Archived Content** link to see a list of archived content on the **Content** tab. Click the name of the content file you want to restore.

 **Note:** The **View Archived Content** link only displays if you have the `Archive Content`, `Add Content`, or `Manage Libraries` privileges in your library permission. If you have the `Archive Content` or `Manage`

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To archive and restore any content in the library:

- `Archive Content` checked in your library permission definition

To archive and restore content that you published:

- `Add Content` checked in your library permission definition

To delete content:

- `Delete Content` checked in your library permission definition

Libraries privileges, you will see a list of all archived content in the library, regardless of author. If you do not have those privileges but have the Add Content privilege, you will only see archived content that you authored and archived.

2. On the **Content Details** page, click **Edit > Restore Content**.

To restore deleted content:

1. On either the **Libraries** or **Subscriptions** tab, or on the **Content Details** page, go to the **Recycle Bin**.
2. Select the checkbox for the content file you want to restore, and click **Undelete**.

Note:

- Authors can always archive and restore their own content. Authors do not require the Archive Content library permission option.
- If a file is in Salesforce CRM Content and also posted in Chatter, archiving it doesn't remove the Chatter post.
- Deleting a Chatter file from the content details page deletes the file from Salesforce CRM Content and from Chatter.

SEE ALSO:

[Delete a File from the File Detail Page](#)

Search and Find Content

The Content tab displays files, content packs, Web links, and Google docs published in your Salesforce CRM Content libraries. If your organization has Salesforce CRM Content enabled, you can take advantage of Salesforce CRM Content functionality on detail pages for leads, accounts, contacts, opportunities, products, cases, or custom objects.

[Find Salesforce CRM Content Related to Records](#)

Quickly find content files that are related to leads, accounts, contacts, opportunities, products, cases, or custom objects by using the related lists on those records.

[Search for Content](#)

The Content tab displays files, content packs, web links, and Google docs that are published in your Salesforce CRM Content libraries.

[View and Edit Content Details](#)

Clicking a file name on the Libraries, Content, or Subscriptions tabs opens the content details page, which is a central access point to preview content and gather information about a particular file, Web link, content pack, or Google doc in Salesforce CRM Content. Starting with the Summer '10 release, if Chatter is enabled for your organization, files posted to Chatter are also listed.

[The Content Related List](#)

The Content related list on a record detail page includes links to all of the content that is associated with that record in Salesforce CRM Content. Click the file name to open the content details page.

[View and Edit Content Subscriptions](#)

Clicking the Subscriptions tab displays the Subscriptions home page, where you can view your Salesforce CRM Content subscriptions and toggle them off or on.

Find Salesforce CRM Content Related to Records

Quickly find content files that are related to leads, accounts, contacts, opportunities, products, cases, or custom objects by using the related lists on those records.

If your organization has Salesforce CRM Content enabled, you can take advantage of Salesforce CRM Content functionality on detail pages for leads, accounts, contacts, opportunities, products, cases, or custom objects. The Related Content related list allows you to search for files, content packs, Web links, or Google docs and attach them to the record. When you attach a file, the latest version is available for the life of the record unless the file is removed.

 **Note:** The **Related Content** and **Content Deliveries** related lists are only available on a record if they have been added to the corresponding page layout by an administrator.

From the Related Content related list, you can:

- Click the content's title to view the content details page where you can perform several tasks, such as commenting and voting on content, downloading files, opening Web pages and Google docs, and subscribing to content, authors, tags, or libraries. For more information, see [View and Edit Content Details](#).
- Click **Del** next to a piece of content to remove it from the record. This action doesn't delete the content from the Salesforce CRM Content library.
- If content deliveries are enabled in your organization, click **Deliver Content** to create a content delivery. A *content delivery* allows you to convert documents such as Microsoft® PowerPoint and Word files into an optimized web-based version for easy online viewing. After you create your delivery, you can send its encrypted URL to any recipient, such as leads, customers, partners, and colleagues, and then track how often people view or download the content. Content deliveries are available in Salesforce Classic only. However, Lightning Email generates delivery-based links as email attachments for Lightning Experience users who have access to the Content Deliveries feature. For more information, see [Creating Content Deliveries](#).
- Search for related content:
 1. Click **Find Content** or **Search All**. In both cases, Salesforce CRM Content searches within the libraries that you have access to. If you click **Search All**, the search results display all the content in your libraries. For the Find Content search, your search results contain content that is relevant to the record; Salesforce CRM Content searches for content with text or attributes that match the following fields:
 - On an opportunity, the `Opportunity Name`, `Account Name`, and all competitors and products.
 - On an account, the `Account Name` and `Industry`.
 - On a case, the `Case Reason`, `Subject`, `Account Name`, and `Industry`.
 - On a lead, the `Name`, `Company`, `Industry`, and `Title`.

 **Note:** On a custom object, clicking **Find Content** returns search results that contain the full custom object name in the document's text or attributes. If no content meets this criterion, the search results are empty and a Search All search is used instead.
 2. On the search results page, filter your results as needed by entering search terms or selecting filter criteria from the sidebar.
 3. Click **Attach** for any file that you want to attach to the record.
 4. Click the **Back** link to return to the detail page.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To access Salesforce CRM Content:

- Salesforce CRM Content User checked in your personal information AND Member of the library

Search for Content

The Content tab displays files, content packs, web links, and Google docs that are published in your Salesforce CRM Content libraries.

If Chatter is enabled, and your admin has enabled the setting to show Salesforce Files in Salesforce CRM Content, files posted to Chatter groups, and other files that aren't private or privately shared, are also displayed on the Content tab. The top 20 most recently modified items are listed by default. You can filter the list using the Filter Your Results sidebar.

To search for specific content:

1. From the Search dropdown list, restrict your search to a specific library or choose to search in all libraries. If available, restrict your search to only Salesforce Files or only files in Chatter groups you're a member of.

 **Tip:** To display all the locations where content appears, click **Display Options** and select **Display Locations**. The locations are listed under each title.

2. Enter your search term and click **Go!**. Salesforce CRM Content performs a full-text search of rich text format (RTF), UTF-8 encoded TXT, HTML, XML, Adobe® PDF, and Microsoft® Word, Excel, and PowerPoint files.
3. If your administrator has enabled multi-language support, you can restrict your search to a specific language. By default, Salesforce CRM Content searches all the content in your libraries that is published in your default user language. Searching in all languages also searches the titles, author names, tags, file extensions, and custom fields of content in all languages.

 **Note:** Searching in all languages does not search the text or description of documents that were published in languages other than your default user language.

4. Optionally, in the Filter Your Results sidebar, filter your search results by file format, featured content, author, tag, libraries, language, custom field, or Chatter group (if available). The number in parentheses next to each filter type shows you how many matching files, content packs, web links, and Google docs are in the search results.

The Content tab provides several options.

- To customize your view by adding sortable columns for various content criteria (such as Size and Publication Date), click **Display Options**. Display Options also lets you choose display descriptions, tags, and locations.
- **Display Locations** shows the libraries and Chatter groups where the content appears. **My Libraries: none** or **My Chatter Groups: none** means that the file is a Salesforce file and is not part of any libraries or Chatter groups. The “smart bar” graphic for downloads, comments, ratings, and subscribers lets you compare files, content packs, Google docs, and links within a search result set.

 **Note:** Chatter groups are included in **Display Locations** only if Chatter is enabled, and if your administrator has enabled the setting to show files in Salesforce CRM Content.

- To create a zip file with your selected content, select one or more files, and click **Download**. Web links and Google docs can't be included in zip files.
- To see a snapshot of information about a file, content pack, Google doc, or web link, and options such as subscribing, voting, and downloading, hover over a file icon.
- To toggle a subscription on or off, click the subscription icon next to the file name. For more information, see [View and Edit Content Subscriptions](#).
- To view the content details page, click the file name. The content details page provides all the available information about a file, content pack, Google doc, or link. For more information, see [View and Edit Content Details](#).

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USER PERMISSIONS

To search Salesforce CRM Content:

- Salesforce CRM Content User checked in your personal information AND Member of the library

Search supports several file types and has file size limits. If a file exceeds the maximum size, the file's content isn't searched, but the file's author name, tags, file extension, and custom fields are.

File Type	File Extensions	Maximum File Size for Search
HTML	.htm, .html, .xhtml	5 MB
PDF	.pdf	25 MB
PPT	.ppt, .pptx, .pptm	25 MB
RTF	.rtf	5 MB
Text	.c, .cpp, .css, .csv, .ini, .java, .log, .sql, .txt	5 MB
Word	.doc, .docx, .docm	25 MB
XLS	.xls, .xlsx, .xlsm	5 MB
XML	.xml	5 MB

SEE ALSO:

[Search for Files](#)

View and Edit Content Details

USER PERMISSIONS

To preview and download shared content:	Member of the library
To preview and download private content:	None
To upload a new version:	Add Content checked in your library permission definition
To archive and restore content:	Archive Content checked in your library permission definition OR Author of the content
To permanently delete content:	Delete Content checked in your library permission definition
To view and edit comments:	Modify Comments checked in your library permission definition
To delete comments:	Delete Comments checked in your library permission definition
To tag content:	Tag Content checked in your library permission definition

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

To mark content as featured:	Feature Content checked in your library permission definition
To deliver content from a shared library:	Deliver Content checked in your library permission definition
To deliver content from a personal library:	Deliver Uploaded Files and Personal Content checked in your library permission definition
To post content from a library to a Chatter feed:	Post Content to Chatter Feeds checked in your library permission definition

Clicking a file name on the Libraries, Content, or Subscriptions tabs opens the content details page, which is a central access point to preview content and gather information about a particular file, Web link, content pack, or Google doc in Salesforce CRM Content. Starting with the Summer '10 release, if Chatter is enabled for your organization, files posted to Chatter are also listed.

The Preview tab displays if your file is one of the following types:

- Microsoft® Office 97 through Microsoft Office 2007 Word, Excel, and PowerPoint. Some Microsoft Office 2007 features don't display correctly in previews.
- Adobe® PDF. Copy-protected PDFs can't be previewed.
- JPG, BMP, GIF, and PNG.

These options are available on the Content Details page, depending on: the type of content you are viewing; your library permissions; and whether the content is in a public or private library, or from Chatter:

- Click the thumbs up or thumbs down icon to vote for the file, Web link, content pack, or Google doc. To change your vote, click the opposite icon. After you cast a vote, the Recent Activity list on the Libraries tab indicates whether you like or dislike the content.
- Click **Deliver Content** to [create a content delivery](#). Click **Deliver Content > Show Content Deliveries** to [view a list of deliveries](#) associated with the content.
- For Web links or Google docs, click the **Open** button to open the Web page in a separate window. For files, click the **Download** button to open or save the file.
- Click **Subscribe** or **Subscribed** to toggle your subscription on or off.
- For files, click the Content Packs subtab to see which content packs include this file.
 - Library administrators can click **Remove from all** to remove the file from all content packs that include the file.
 - Click the name of the content pack that includes the file to view the details of that content pack.
- Click **Edit > Edit Content Details** to modify standard and custom fields.
- For files, click **Edit > Upload New Version** to [replace the file](#) with a new version. The version option is not available for Web links, or Google docs.



Note: If the **Add New Version** button is unavailable, your organization has exceeded its file storage allowance and new content cannot be uploaded.

- Click **Edit > Archive Content** to [remove the file, Web link, content pack, or Google doc from the library](#). Authors can archive and restore their own content regardless of library permissions. If a file is in Salesforce CRM Content and also posted in Chatter, archiving it doesn't remove the Chatter post.
- Click **Edit > Delete Content** to [delete the file, Web link, content pack, or Google doc from Salesforce CRM Content](#) by moving it to the Recycle Bin. Authors can delete and undelete their own content regardless of library permissions. Deleting a Google doc removes the doc's association with Salesforce CRM Content but does not delete the doc in Google Apps. You cannot delete a file that is

included in a content pack or content delivery. Deleting a Chatter file from the content details page deletes the file from Salesforce CRM Content and from Chatter.

- Click **Edit** > **Library Actions** and choose **Move to Another Library** to move the content to a different managing (or “home”) library. Choose **Share to Another Library** to share content into additional libraries without changing the managing library. Sharing or linking content to other libraries enables members of those libraries to find your content. If the managing library and shared library have different tagging rules, the most restrictive tagging rule applies. If you want to remove content from a library where the content is shared, click **Remove from Libraries**. This option does not remove content from its managing library.
- Click the Comments subtab to view, add, edit, or delete comments.
- Click the Versions subtab to view a list of all file versions and the reason-for-change statements provided by the authors.
- Click the Downloads subtab to view a list of all Salesforce CRM Content users who have downloaded the file. Download data is not available for Web links or Google docs.
- Click the Subscribers subtab to [view a list](#) of all Salesforce CRM Content users subscribed to the file, Web link, or Google doc. To subscribe to an author, click the dropdown button next to the author's name. To subscribe to a library, click the dropdown button next to the library name.
- Enter a web address for the content in the **URL** field.



Note: The **URL** field is visible in the content details page when the `contentURL` parameter of `contentVersion` has a value.

- Click a tag name to view all the content associated with that tag. Click the arrow next to the tag to remove the tag or to subscribe to all content with that tag.
- To add a tag, enter a tag name in the `Add Tags` field and click **Save**. As you type a tag, Salesforce CRM Content autosuggests tags based on the tags in your My Recent Tags list in the Save or Publish window and the Popular Tags section on the Libraries tab.



Note: If your administrator applied a library tagging rule, you aren't able to enter new tags. If the guided tagging rule is applied, you can click **Add Tags** and choose from the list of suggested tags or enter new tags. If the restricted library tagging rule is applied, you can click **Add Tags** and choose from the list of suggested tags, but you cannot enter your own tags.

- Click the author's name to see a list of the author's published content. Click the arrow next to the author's name and choose **Subscribe to Author** to subscribe to all content published by that author.
- Click **Feature** or **Don't Feature** to toggle the “feature” designation on or off. Featured content receives a higher priority than similar content in search results; for example, if 100 files contain the search criteria term `sales asset`, any featured files with that term appear at the top of the search results list. Featured content is also listed on the library overview and library detail pages for quick access.
- Click a library name to view details about the library. Click the arrow next to the library name and choose **Subscribe to Library** to subscribe to all content in the library or **Show Library Content** to view a list of all files, content packs, Web links, and Google docs published to the library.

The Content Related List

The Content related list on a record detail page includes links to all of the content that is associated with that record in Salesforce CRM Content. Click the file name to open the content details page.

Only Salesforce CRM Content users who are members of the library where the content was published can see the published file in the Content related list. For example, if you select the “Big Deal” opportunity when publishing `BigDealStrategy.doc` into the Sales Collateral library, the Content related list on the “Big Deal” opportunity includes a link to `BigDealStrategy.doc` only for members of the Sales Collateral library. Users who are not members of that library do not see the link.

You can use the Related Content related list to access Salesforce CRM Content from leads, accounts, contacts, opportunities, products, cases, or custom objects. For more information, see [Find Salesforce CRM Content Related to Records](#) on page 221.

View and Edit Content Subscriptions

Clicking the Subscriptions tab displays the Subscriptions home page, where you can view your Salesforce CRM Content subscriptions and toggle them off or on.

 **Note:** To subscribe to a file, content pack, Web link, or Google doc, [view its content details page](#) and click **Subscribe**. From the content details page you can also subscribe to a tag, author, or library by using the dropdown menus next to the tag, author, or library name.

On the Subscriptions tab, click the Content, Tags, Authors, or Libraries subtabs to view your subscriptions. Depending on your notification settings, you are notified of changes to your subscribed content via real-time emails or a once-daily email.

 **Tip:** To configure your notification settings, go to your personal information page, click **Edit**, and select `Receive Salesforce CRM Content email alerts`. If you want to receive a once-daily summary rather than real-time email alerts, also select `Receive Salesforce CRM Content emails as daily digest`.

Subscriptions generate these notifications.

- If you subscribe to a file, you are notified when a viewer adds comments to the file or when a new version of the file is published. If you subscribe to a Web link or Google doc, you are notified when comments are added but not when the link is changed or the doc is edited.
- If you subscribe to a content pack you are notified when a new version of the pack is published. Unless you are subscribed to the individual files within a content pack, you are not notified when new versions of the files are published.
- If you subscribe to a tag, you are notified of any newly published content that is related to the subscribed tag. To be notified that new versions of the tagged content are available, subscribe to the content.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To access Salesforce CRM Content:

- Salesforce CRM Content User checked in your personal information

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To subscribe to content:

- Salesforce CRM Content User feature license enabled on the user detail page
- OR
- Portal user with `View Content in Portals` profile permission

- If you subscribe to an author, you are notified when the author publishes new content. To be notified that new versions of an author's content are available, subscribe to the content.
- If you subscribe to a library, you are notified when new content is added to the library, including existing content that has been newly linked to your subscribed library. To be notified that new versions of the library content are available, subscribe to the content.

 **Note:** External community or portal users who subscribe to content don't see the **Download** and **View Details** links in email notifications.

SEE ALSO:

[Update Content Versions](#)

[Follow a File](#)

[Upload a New Version of a File](#)

View and Edit Libraries

When you have located a Salesforce CRM Content library in the My Libraries area of the Libraries tab home page or on a content details page, click the library name to display detailed information.

For details about the publishing options at the top of the page, see [Upload and Publish Content](#).

From the library title area, you can click the following quick links:

- **Browse** to [view search results](#) showing all the content in the library.
- **Edit** to change the library name or description.
- **Delete** to delete an empty library. To delete a library that contains content, move the content to another library or delete it and then permanently delete it from your Recycle Bin.

 **Note:** If your Recycle Bin is empty and you are unable to delete the library, another user's Recycle Bin can contain deleted content from the same library. A library cannot be deleted until all its content is permanently deleted or moved to another library.

- **Edit Members** to add or remove library members or change their library permission.
- **Tagging Rules** to change the tagging method permitted in the library.
- **Record Types** to restrict the record types available to library contributors.
- **View Archived Content** to view a list of archived content in the library. If you don't have the `Archive Content` or `Manage Libraries` privilege in your library permission, the archived content list only contains content that you authored and archived, not content that other authors archived.

The library detail page contains these sections.

- **Members**

This section lists all the Salesforce CRM Content users who are members of the library. To limit the member list, enter a username and click **Filter**. You can filter by the beginning of a username but not the last name.

To add new members to the library:

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

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To edit a library:

- `Manage Salesforce CRM Content`

OR

`Manage Libraries` checked in your library permission definition

To add or remove library members:

- `Manage Salesforce CRM Content`

OR

`Manage Libraries` checked in your library permission definition

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



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

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



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

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

To remove a member from the library, click **Remove**. To change a member's library permission, click **Edit** and choose a new library permission from the dropdown list.

- **Featured Content**

This section lists the five pieces of content in the library most recently designated as “featured.” If no content has been featured, this section does not display. Featured content receives a higher priority than similar content in search results; for example, if 100 files contain the search criteria term *sales asset*, any featured files with that term appear at the top of the search results list. To see all featured content, click **Show All**. To toggle the feature status on or off, go to its [content details page](#).

- **Top Content**

This section includes lists that summarize content activity in your library. Within a list, click a file icon to download the content or click the title to open the associated content details page. In the Top Content section you can choose from the following categories:

- **Publication Date**—This content is sorted in descending order according to the most recent publication date. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the published files, Web links, and Google docs.
- **Num Downloads**—This content is sorted in descending order according to the highest number of downloads. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the downloaded content.
- **Rating**—This content is sorted in descending order according to the highest number of thumbs-up votes. Green and red in the bar graphic represent positive and negative votes, respectively. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the content with votes.
- **Num Comments**—This content is sorted in descending order according to the highest number of viewer comments. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the content with associated comments.

- **Popular Tags**

This “tag cloud” shows you how the content in your library has been labeled. Tags are descriptive terms assigned during upload or revision that help classify and organize content. Click a tag name to view search results containing all the files, Web links, and Google docs with that tag. The tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most content. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the 30 most popular tags.

- **Recent Activity**

This section is a snapshot of activity within your library. It shows the most recent files, Web links, and Google docs to receive comments, votes, or subscriptions. Featured content and newly published content are also included, but new versions of existing content, archived content, and deleted content do not appear in the Recent Activity section. Use the **Older** and **Newer** buttons to scroll through records. The Recent Activity section contains a maximum of 100 records.

- Most Active Contributors

This section shows the authors who have uploaded content into your library most frequently. The names increase in size according to activity, so the largest names are the authors who have contributed the most content.

Manage Libraries

On the Libraries tab, access your private library, create libraries, choose libraries to view or edit, and analyze library usage and activity.

For details about the publishing options at the top of the page, see [Upload and Publish Content](#). The libraries home page has two tabs: Shared Content, which provides information about shared libraries, and My Private Files, which contains information about your private library.

Shared Content

The Shared Content tab on the libraries home page contains the following sections:

- My Libraries

This section lists all the libraries to which you have access. Click a library name to view details about that library or click **Browse** to view a list of all the content in the library. Click the **New** button to create libraries, add users to a library, or assign library permissions to users.

- Featured Content

This section lists the five pieces of content in your libraries most recently designed as “featured.” Featured content receives a higher priority than similar content in search results; for example, if 100 files contain the search criteria term *sales asset*, any featured files with that term appear at the top of the search results list. To see all featured content, click **Show All**. To toggle a piece of content’s feature status on or off, go to its [content details page](#).

- Top Content

This section includes lists that summarize content activity across all your libraries. Each list sorts content according to specific criteria. Within a list, click a file icon to download content or click a title to open the associated content details page. In the Top Content section you can choose from the following categories:

- **Publication Date**—This content is sorted in descending order according to the most recent publication date. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the published files, Web links, and Google docs.
- **Num Downloads**—This content is sorted in descending order according to the highest number of downloads. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the downloaded content.
- **Rating**—This content is sorted in descending order according to the highest number of thumbs-up votes. Green and red in the bar graphic represent positive and negative votes, respectively. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the content with votes.
- **Num Comments**—This content is sorted in descending order according to the highest number of viewer comments. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying dropdown list, or click the **Show All** button to list all the content with associated comments.

- Popular Tags

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

To create libraries:

- Manage Salesforce CRM Content
- OR
- Create Libraries

To edit libraries:

- Manage Salesforce CRM Content
- OR
- Manage Libraries checked in your library permission definition

This section, commonly referred to as a “tag cloud,” shows you how the content in your libraries has been labeled. Tags are descriptive terms assigned during upload or revision that help classify and organize content. Click a tag name to view search results containing all the files, Web links, and Google docs with that tag. The tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most content. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the 30 most popular tags.

- Recent Activity

This section is a snapshot of activity within your libraries. It shows the most recent files, Web links, and Google docs to receive comments, votes, or subscriptions. Featured content and newly published content are also included, but new versions of existing content, archived content, and deleted content do not appear in the Recent Activity section. Use the **Older** and **Newer** buttons to scroll through records. The Recent Activity section contains a maximum of 100 records.

- Most Active Contributors

This section shows the authors who have published content into your libraries most frequently. The names increase in size according to activity, so the largest names are the authors who have contributed the most content.

My Private Files

The My Private Files tab on the libraries home page is your private library. When you upload or create content and do not select a public library, your content is stored in your private library. You can publish content to a public library at any time or leave content in your private library indefinitely. Content in your private library can be assembled in content packs. It can also be sent to leads and contacts outside your organization using the content delivery feature. The My Private Files tab has these sections:

- Private Library

If you choose the **Save to my private library** option when publishing a file, Web link, content pack, or Google doc, your content is saved here. You can publish or delete files from this list or click the file's name to view its content details page. The following options that are available on the content details page for shared content are not available for private-library content: tagging, rating, subscribing, tracking downloads, tracking subscriptions, or using custom fields. If you publish a file from the Private Library list and click **Cancel** during the publishing process, your file is deleted.

- Upload Interrupted

If an error occurs when you upload a new file, for example your browser crashes or your session times out, the file you were uploading is saved here. Click **Publish** to publish the file to a public library or save it to your private library. If you click **Cancel** on the Save or Publish Content dialog, your file is deleted.

- Revision Upload Interrupted

If an error occurs when you upload a new version of a file, the file you were uploading is saved here. Users can continue to access the original version. Click **Publish** to publish the file to a public library or save it to your private library. If you click **Cancel** on the Save or Publish Content dialog, your file is deleted.

Deliver Content

Use *content delivery* to convert documents into an optimized web-based version for easy online viewing.

[Create Content Deliveries](#)

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

[View and Edit Content Deliveries](#)

On the Content Deliveries related list or the Content Deliveries list page, click the name of a content delivery to open the detail page.

[Use the Content Deliveries Related List](#)

A *content delivery* allows you to convert documents such as Microsoft® PowerPoint and Word files into an optimized web-based version for easy online viewing.

Create Content Deliveries

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

A content delivery can be created from the Content Deliveries related list on most Salesforce objects. Salesforce CRM Content users can also create a content delivery from the content details page or the Related Content related list.

1. From the Content Deliveries related list, Related Content related list, or the content details page, click **Deliver Content**.
2. Upload a file.
3. Optionally, modify the `Delivery Name` field. This name identifies your content delivery in Salesforce. We recommend using a name that makes the delivery easily distinguishable from other deliveries on the same record. The default delivery name includes the file name and today's date.
4. Select the delivery methods that determine how your content can be viewed. The options that appear depend on the file format you uploaded.

Allow Recipient to View in the Browser	Creates an online version of the file that recipients can view in their browser.
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EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM Content available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create content deliveries from a shared library in Salesforce CRM Content:

- Member of the library

AND

Deliver Content checked in your library permission definition

To create content deliveries from a personal library in Salesforce CRM Content:

- Create Content Deliveries

To create content deliveries (non-Content user):

- Create Content Deliveries

Allow Recipient to Download as <i>[file type]</i> file	Lets the recipient of your content delivery view the content in its original format. For example, if you uploaded a Microsoft® Word file, this field is <code>Allow download as .doc file</code> . If a preview of the file doesn't exist in Salesforce, users can download the delivered file regardless of whether downloading is allowed. File previews are made the first time they are requested in Salesforce, but not before. Viewing a file's detail page or posting it to a feed generate file previews.
Allow Recipient to Download as PDF	Lets recipients download a .pdf version of the file. This option is only available for Microsoft® PowerPoint, Word, and Excel files.

5. Select `Notify Me of First View or Download` if you want to receive an email the first time your recipient clicks the content-delivery URL.
6. If the content you are delivering is time-sensitive, select the `Remove Access to Content on` checkbox and enter an expiration date. By default, the expiration date is 90 days from the current date. After creating your content delivery, you can change the expiration date at any time on the delivery detail page.
7. Optionally, select `Require a Password to Access Content`. When you create the content delivery, you receive a password to include with the delivery URL that you send to your recipients. The password is available for the life of the delivery on the delivery detail page.
8. Optionally, use the lookup to associate your content delivery with a Salesforce record. The record you were viewing when you clicked **Deliver Content** is selected by default.
9. Click **Save & Next**. Your delivery is usually ready within a few moments, but you can click **Notify Me** to exit the content delivery wizard and be notified via email when your content delivery is ready.
10. If you did not exit the content delivery wizard, click **Preview** to verify that you are satisfied with the delivery.
 -  **Important:** Formatting in the original file sometimes doesn't display correctly in the online version. If you chose `Allow Recipient to View in the Browser`, preview your content delivery before sending its URL to your recipients. If you are not happy with the quality of the online version, click **Previous** and choose to make your content available in its original file format or a PDF only.
11. Copy and paste the delivery URL and, if applicable, its password into an email or instant message for delivery. The URL is available on the delivery detail page. For more information, see [Viewing and Editing Content Deliveries](#).

SEE ALSO:

[Share Files Via Link](#)

View and Edit Content Deliveries

On the Content Deliveries related list or the Content Deliveries list page, click the name of a content delivery to open the detail page.

- View Content Delivery Details

The delivery detail page provides all the information associated with a content delivery, including the number of times the delivery has been viewed, and the delivery settings. The URL providing access to the content delivery is visible only if you have access to the content or to a record associated with the content, or are the content delivery owner. For a description of each field, see [Content Delivery Fields](#).

- Edit Content Delivery Details

Click **Expire Now** to immediately remove access to the content delivery. Click **Edit** to modify details such as the delivery methods, expiration date, or the record the delivery is associated with. For a description of each field, see [Content Delivery Fields](#).

- Delete Content Deliveries

- Click **Delete** to remove access to the content delivery and delete the delivery record from Salesforce. Salesforce CRM Content users cannot delete files that are associated with a content delivery until the content delivery is deleted.

- Track Content Deliveries

Each time a content delivery's URL is opened, Salesforce records the event as a *view*. The Views related list on the content delivery detail page lists every view associated with the delivery. Information about the view includes the date and time, whether the view was by an internal (Salesforce) user, and whether the view included a download. If the content delivery provided the ability to download the file in its original file format or as a PDF file, the `FileDownloaded` flag indicates that a download occurred, but you cannot distinguish between file types.

EDITIONS

Available in: Salesforce Classic

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

Salesforce CRM Content available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view the delivery detail page:

- Access to the associated content details page in Salesforce CRM Content

OR

Access to the record associated with the content delivery

To edit, expire, or delete a content delivery:

- Owner of the record

OR

Modify all Data

Use the Content Deliveries Related List

A *content delivery* allows you to convert documents such as Microsoft® PowerPoint and Word files into an optimized web-based version for easy online viewing.

After you create your delivery, you can send its encrypted URL to any recipient, such as leads, customers, partners, and colleagues, and then track how often people view or download the content. Content deliveries are available in Salesforce Classic only. However, Lightning Email generates delivery-based links as email attachments for Lightning Experience users who have access to the Content Deliveries feature.

From the Content Deliveries related list on leads, business accounts, contacts, opportunities, cases, campaigns, and custom objects you can:

- Click **Deliver Content** to create a new content delivery and associate it with the record you are viewing. For more information, see [Creating Content Deliveries](#).
- Click **Preview** to open the content delivery. Each time you view a content delivery, it is recorded as one internal view on the Views related list.
- Click the content delivery name to open the detail page for that delivery. For more information, see [Viewing and Editing Content Deliveries](#).

Google Apps

Integrate Google apps like Google Docs and Gmail with Salesforce.

[Google Apps Overview](#)

Google Apps™ is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. Salesforce integrates key Google Apps services and provides several AppExchange apps that enhance and customize Google-related functionality.

[Use Google Docs in Salesforce](#)

Use Google Docs™ to create and share on-demand documents, presentations, and spreadsheets (“Google docs”) and see your changes in real time as you collaborate with other users. Because your content is stored within Google, there is no need to manage versions or send attachments by email—simply log in with your Google Apps account and view the current document or its revision history.

[Add Google Docs to Salesforce](#)

Add an existing Google doc to any record or library in Salesforce.

[Contribute Google Docs to Salesforce CRM Content](#)

Add Google Docs to libraries in Salesforce to leverage the permission setting capabilities of Salesforce CRM Content

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create a content delivery:

- None

To edit a content delivery:

- Owner of the record
- OR
- Modify all Data

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

Google Apps Overview

Google Apps™ is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. Salesforce integrates key Google Apps services and provides several AppExchange apps that enhance and customize Google-related functionality.

Not all Google Apps features are available in Lightning Experience. Those that are available may not look the same as they do in Salesforce Classic.

The following services for Google Apps are integrated with Salesforce and require a simple activation by a Salesforce administrator.

Add Google Docs to Salesforce

Google Docs™ allows you to create on-demand documents, spreadsheets, and presentations, edit them in your browser, and work together in real time with other collaborators. When the Add Google Docs to Salesforce service is activated, you can:

- Use the Google Docs, Notes, & Attachments or Google Docs & Attachments related list on any Salesforce record to create, edit, or view Google docs and associate them to a record.
- Share a Google doc with any Google Apps user in your organization.
- Associate Google docs with Salesforce records even when you are not working in Salesforce by using the **Add Google Doc to Salesforce** browser button.
- Add Google docs to Salesforce CRM Content, which allows you to manage all types of content in a centralized location.

Gmail to Salesforce

Gmail™ is a Web-based email application that operates on all standard browsers and can be used with your company's domain. Use Gmail to Salesforce to automatically log emails you send from your Gmail account as activities on lead and contact records in Salesforce.

Gmail Buttons and Links

Gmail Buttons and Links adds **Gmail** links next to email fields on all records and adds **Compose Gmail** buttons in Activity History on leads and contacts. When you select a Gmail link or **Compose Gmail**, Salesforce automatically logs you in to your Gmail account and automatically populates the To field. If Gmail to Salesforce is activated, Salesforce also populates the BCC field with your Email to Salesforce address.

EDITIONS

Available in: both Salesforce Classic (**not available in all orgs**) and Lightning Experience

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

Use Google Docs in Salesforce

Use Google Docs™ to create and share on-demand documents, presentations, and spreadsheets (“Google docs”) and see your changes in real time as you collaborate with other users. Because your content is stored within Google, there is no need to manage versions or send attachments by email—simply log in with your Google Apps account and view the current document or its revision history.

Salesforce and Google Apps lets you integrate Google Docs with Salesforce. The Docs home page in your Google Apps account lists all the Google documents, presentations, and spreadsheets that you have created or that other Google Apps users have shared with you.

For information about Google Docs, refer to [Google's online help](#).

Add Google Docs to Salesforce

Add an existing Google doc to any record or library in Salesforce.

 **Note:** To use a Google Apps service in Salesforce, you must be logged in to your Google Apps business account. Business accounts use your organization's domain; for example, *john.doe@company.com*. If you are unsure of your Google Apps username and password, contact your administrator.

Add a Google Doc to a Salesforce Record

1. Open a case, opportunity, or other record.
2. On the Google Docs, Notes, & Attachments related list or the Google Docs & Attachments related list, click **Add Google Doc**.
3. Enter the name of the Google doc.
4. Enter the Google doc URL.
5. Click **Save**.

Add a Google Doc to a Salesforce CRM Content Library

1. On the **Libraries** tab or on a library detail page, click **Add Google Doc**. Log in to Google Apps if prompted.
2. Enter the Google Doc URL.
3. Click **Contribute**.
4. Enter a title and select a library. See [Publish Files to Libraries](#) for detailed instructions on publishing content to a library.
5. Click **Publish**.

 **Note:** While you have your Google doc open, remember to share it with other Google Apps users in your organization. Only people with access to the Google doc in their Google Apps account can open the doc from Salesforce.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

USER PERMISSIONS

Using Google Docs in Salesforce

- Read on the appropriate record type
- AND
- Google Apps account

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

Creating a Google doc and linking it to Salesforce records:

- Edit on the appropriate record type
- AND
- Google Apps account

 **Tip:** For information about using Google Docs, refer to [Google's online help](#).

Contribute Google Docs to Salesforce CRM Content

Add Google Docs to libraries in Salesforce to leverage the permission setting capabilities of Salesforce CRM Content

With Google Docs™, you can create and share on-demand documents, presentations, and spreadsheets (Google docs) and see your changes in real time as you collaborate with other users. Associating your Google docs with Salesforce CRM Content allows you to access all types of content from a single, fully-indexed location. It also ensures that your Google docs receive the feedback and tracking benefits provided by Salesforce CRM Content features such as votes, comments, and subscriptions.

 **Note:** The **Add Google Doc** button on the **Libraries** tab is available only if your Salesforce admin has enabled the Add Google Doc to Salesforce service.

Add New Google Docs to a Salesforce CRM Content Library

1. On the **Libraries** tab or on a library detail page, click **Add Google Doc**. Log in to Google Apps if prompted.
2. Enter the Google Doc URL.
3. Click **Contribute**.
4. Enter a title and select a library. See [Publish Files to Libraries](#) for detailed instructions on publishing content to a library.
5. Click **Publish**.

 **Note:** While you have your Google doc open, remember to share it with other Google Apps users in your organization. Only people with access to the Google doc in their Google Apps account can open the doc from Salesforce.

Adding Existing Google Docs to a Salesforce CRM Content Library

If you have an existing Google doc, you can publish it into a library:

1. On the Libraries tab, choose **Add Existing** from the Add Google Doc drop-down button. A list of all the Google docs in your Google Apps account displays.
2. To limit your list of docs, enter a search term or choosing to view only documents, presentations, or spreadsheets.
3. Select the Google doc that you want to add to Salesforce CRM Content and click **Contribute**.
4. Optionally, edit the title of your Google doc and/or add a description.
5. Choose a library. If you do not want to add the doc to a public library, for example if the doc is still in progress, choose **Save in my private library**.
6. Optionally, choose a language. If multi-language support is enabled, the Language dropdown list is displayed. If you do not choose a language, Salesforce associates your content with your personal language setting. If users restrict their content searches to a particular language, only content associated with that language is displayed in the search result set.
7. To publish the content on behalf of another author, choose that author from the dropdown list.
8. Tag your content. Your tagging permission depends on the tagging rule assigned to the library:

EDITIONS

Available in: Salesforce Classic

Salesforce CRM Content is available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Google Docs is available in all editions

USER PERMISSIONS

Creating a Google doc and linking it to a Salesforce CRM Content library:

- Library member with a library permission that permits contributing content

AND

Google Apps account

- If the library does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the `Tags` field. As you type a tag, Salesforce CRM Content autosuggests tags based on your My Recent Tags list and the Popular Tags section on the Libraries tab. The My Recent Tags list on the Contribute window shows the 20 tags that you used most recently. To add a tag, click it to automatically add it to the `Tags` field.
 - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. To add a suggested tag, click it to automatically add it to the `Tags` field.
 - If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag, it turns green.
 - You can't change or delete tag names. You can remove tags from a document, but that doesn't delete the tag.
 - Tags are case insensitive. You can't have two tags with the same name even if they use different upper and lowercase letters. The case of the original tag is always used.
9. If multiple record types are available, choose one from the dropdown list. The record type determines which custom fields appear for you to categorize and define your content.
10. After completing the custom fields, click **Publish** or **Save**.

Salesforce Chatter for Windows 10 Anniversary Edition Users

Salesforce Chatter is a downloadable app for Windows 10 Anniversary Edition users. Salesforce Chatter combines Chatter feeds and posting functionality with the power of an app optimized for Windows 10 users.

Using the Salesforce Chatter app, you only have to log in to Salesforce once to access everything Salesforce has to offer in the app and the full site. You can launch directly into the full Salesforce site to view Lightning Experience pages, saving time and getting to information you need most faster. On the Windows Surface Pro 4, you can attach drawings made in the app to Chatter posts for new ways of collaborating on projects and sharing updates.

[Requirements for the Salesforce Chatter App](#)

Salesforce Chatter is supported for devices running Windows Anniversary Edition.

[Get the Salesforce Chatter App](#)

Salesforce Chatter is available from the Windows Store. Devices must be running Windows 10 Anniversary Edition.

[What's Available in the Salesforce Chatter App](#)

Salesforce Chatter gives you more ways than ever to collaborate with coworkers using Chatter. Salesforce Chatter requires only a single authentication to access all of Salesforce. You can also attach drawings directly from the app to Chatter posts.

Requirements for the Salesforce Chatter App

Salesforce Chatter is supported for devices running Windows Anniversary Edition.

Salesforce performs automated and manual testing of devices running the Windows 10 Anniversary Edition only.

Customers aren't blocked from using Salesforce Chatter on untested operating systems. The operating systems are subject to change, with or without notice.

Get the Salesforce Chatter App

Salesforce Chatter is available from the Windows Store. Devices must be running Windows 10 Anniversary Edition.

Install Salesforce Chatter

The Salesforce Chatter downloadable app is available for Windows 10 Anniversary Edition users. You can download and install Salesforce Chatter from the Windows Store.

Once the app is installed, launch it from your home screen and log in to your Salesforce account.

 **Note:** If you're not able to log in, verify with your Salesforce admin that you're enabled to use the downloadable app.

What's Available in the Salesforce Chatter App

Salesforce Chatter gives you more ways than ever to collaborate with coworkers using Chatter. Salesforce Chatter requires only a single authentication to access all of Salesforce. You can also attach drawings directly from the app to Chatter posts.

[Post Drawings with Salesforce Chatter](#)

You can post drawings made with the Salesforce Chatter canvas directly on to Chatter posts on touch enabled Windows 10 devices.

[Authenticate Once with Salesforce Chatter](#)

Salesforce Chatter makes getting to work in the full Salesforce site easier than ever. Just log in to the Salesforce Chatter app and launch the full Salesforce site directly from the app.

Post Drawings with Salesforce Chatter

You can post drawings made with the Salesforce Chatter canvas directly on to Chatter posts on touch enabled Windows 10 devices.

Create a new Chatter post and tap **Draw** to launch the canvas.

Once inside the canvas, use the ruler feature for straight lines, or draw with a stylus or finger. Once your drawing is complete tap **Attach**.

You can share more context for your drawing in the Chatter post, or tag coworkers and groups to share the drawing with them specifically.

Tap **Post** to share the drawing in your Chatter feed or with a group depending on the audience of your post.

Authenticate Once with Salesforce Chatter

Salesforce Chatter makes getting to work in the full Salesforce site easier than ever. Just log in to the Salesforce Chatter app and launch the full Salesforce site directly from the app.

Tap **Full Site** in the left navigation menu to launch your Salesforce homepage. You can also open a specific Chatter post, file, or image in Lightning Experience directly in your browser by tapping  and **Open in browser**.

Collaborate with Partners and Customers

Share updates with customers and partners in Chatter groups.

[Chatter Customers in Private Groups](#)

Chatter customers are people outside your company's email domains. Customers can see only the groups they're invited to. They can interact only with members of those groups. Customers can't see any Salesforce information.

[Add or Remove Customers in Chatter Groups](#)

If customer invitations are enabled for your organization, you can invite, add, and remove customers.

Chatter Customers in Private Groups

Chatter customers are people outside your company's email domains. Customers can see only the groups they're invited to. They can interact only with members of those groups. Customers can't see any Salesforce information.

Chatter customers:

- Can be added to Chatter only if:
 - A manager or owner of a group that [allows customers](#) invites them to the group.
 - An administrator adds them in Setup by entering *Users* in the *Quick Find* box, then selecting **Users**.
- Can see only:
 - Groups they belong to.
 - People in groups they belong to. Customers see only limited profiles. In a profile, they see photo, name, title, email, common group memberships, common files, and activity statistics and influence. They can't post to profiles.
 - Files shared to groups that they belong to.
- Can't see:
 - Records or other Salesforce information, even in search results.
 - Topics, including topics in the feed, the topics list, topic detail pages, Recently Talked About, and Trending Topics. (Customers can see hashtag (#) topics.)
 - Recommendations and can't be recommended to others. Groups that allow customers can't be recommended.
- Are identified as customers in profiles and in the groups they belong to. You can identify customers and groups with customers by the orange upper left corner of their photo.
- Have limited profiles that include name, photo, title, company, email, feed, group membership, file ownership, and activity statistics and influence.
- Can't be followed. Customers can't follow people or files.
- Can be group members and managers. If the customer is a manager, they can see users who request to join the group, even if they aren't in other common groups. And they can approve requests.
- Can't own, create, delete, moderate, join, or ask to join groups.
- Can invite people that they're in common groups with to join groups that they manage.
- Can't invite people inside your company's domain whose profiles they can't see.

EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

Considerations for Mobile Users

Chatter customers can log in and use the Salesforce mobile app. The same restrictions are applied to customer users as when using Chatter on the web.

SEE ALSO:

[Chatter Groups](#)

[Add or Remove Customers in Chatter Groups](#)

Add or Remove Customers in Chatter Groups

If customer invitations are enabled for your organization, you can invite, add, and remove customers.

It must be a private group that you own or manage and that [allows customers](#).

1. Navigate to a group detail page.
2. To add people who aren't already customers in your company, click **Invite People**, or **Add/Remove Members > Invite them to Salesforce Chatter!**. Enter email addresses separated by commas, add an optional message if you like, and click **Send**.

When a customer accepts your invitation, they get access to Chatter and become a member of the group.

3. To add people who are already customers in your company, click **Add/Remove Members**.

Note:

- When you invite a customer to your group, they get a unique username and password to log in to the group. They get the username and password even if they're already a member of another Salesforce organization. They can't use other Salesforce logins to access your customer group.
- If a customer can't log in to the group, verify that they're using the authentication credentials from their welcome email. If the problem persists, ask your administrator for help.
- If a customer loses their password, they can use the Forgot Password option to reset it. If they don't have their username, they can recover it by contacting the administrator of the organization in which they're a customer.

SEE ALSO:

[Add and Remove Chatter Group Members](#)

[View Chatter Group Members](#)

Collaboration Resources for Users

In addition to online help, Salesforce publishes printable documentation to help you learn about our features.

These documents include tip sheets, user guides, and other resources that describe the features and capabilities of Salesforce. These documents are available as Adobe® PDF files. Adobe Reader® is required to open PDF files; to download the latest version of Reader, go to www.adobe.com/products/acrobat/readstep2.html.

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