Getting Started Checklist

Are you ready to get started with Salesforce Content? Look no further—here's your 5-step checklist to get up and running. In only 30 minutes, you can be on your way to improving sales effectiveness, marketing productivity, and customer satisfaction.

Step 1 (video)

Designate which users can access Salesforce Content. When you first log in, you'll see Content in the application dropdown box, but you may not see any tabs if you select the Content app. You need to do two things to fix that:

- Ensure that the "Manage Salesforce Content" box is checked on your user profile. (It should be checked automatically if you have a standard system administrator profile.)

- Make yourself a Salesforce Content user. Go to Setup / Administration Setup / Manage Users / Users. For each user who should have access to Salesforce Content, check the "Salesforce Content user" box. (If you need to license large numbers of users, you can also use the Apex Data Loader.)

Step 2 (video)

Define user access rights. (e.g., publish, view-only) You can control whether users can publish, view, tag, comment on, or delete documents—and more. There are two required steps:

- Set up user access rights. Go to Setup / App Setup / Customize / Salesforce Content / Workspace Permissions and click "Add a Workspace Permission." Then select which rights each permission includes. Each time you add a user or group to a workspace, you can control what permission they get.

- Create a workspace and add members. Go to the "Workspaces" tab, and hit "new." Once you enter a name and description, you can then add workspace members—either as individual users or as public groups, both of which are pulled from the standard Salesforce user administration. After adding a workspace permission for each member or group, your workspace is all ready.

Step 3 (video)

Share materials with colleagues. Once you've added publishers to a workspace, it is easy for them to share content in a flash. Start by clicking on the "Contribute" tab in the "Content" app, and then you can either upload a file or post a website link. Choose the workspace where you want to share the file or link, and then add a title, description, and tags. If the system administrator has created any custom fields, you'll have the opportunity to complete those too. Once you hit "publish," you're done—and within seconds, your materials are ready to share.

Step 4
[(video)]

Search and find documents in a snap. It's easy to find just what you're looking for in Content—no more digging through mazes of folders for something you saw only days before!

- Use the tag cloud. Start on the "Workspaces" tab from within the "Content" application. Click on a word in the tag cloud to see content about that topic. The larger tags in bold font simply represent the tags that have the most content associated with them.

- Try a keyword search. You can use our Google-like search to find where a keyword appears, even beyond the title and tags—right down to the document text in key file formats. So you can be confident that your search will find what you want, even if it only shows up in the footnotes.

- Filter and sort documents. Once you get a set of search results, it's easy to slice and dice them quickly. First, use filters to narrow down your results set to a certain file type, like PowerPoint presentations, or a specific author. Or sort to see what has been downloaded most often.

- Preview a presentation. After clicking on a specific search result, you can get a brief preview of a Powerpoint presentation—even before you download it! This is a great way to confirm that the document is the one you wanted, without waiting minutes for a download to complete.

Step 5

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