ACTIVITY CUSTOM LOOKUPS (PILOT)

> **Note:** The activity custom lookups feature is currently available through a pilot program. Any unreleased services or features referenced in this or other press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

With the Summer '14 release, Salesforce lets you add custom lookup fields on the Activity object. This capability is the top activity-related idea in the Salesforce IdeaExchange community. Now you can define more relationships between events or tasks and objects such as campaigns, trainings, or custom objects.

Request Nomination

Customers

Contact your Salesforce account representative or Salesforce customer support to request nomination for this pilot.

Salesforce.com Internal

Create a new R&D Program Participant record for the "Activity Custom Lookups" pilot program.

Important Dates

- **Nominations open:** May 5, 2014
- **Nominations close:** TBD

- **Private pilot begins:** With Summer '14 release
- **Private pilot ends:** TBD
- **Feature enablement:** Within 14 days of the later of (1) acceptance of your pilot nomination or (2) the Summer '14 release date for your Salesforce instance.

> **Note:** This feature is unavailable in releases earlier than 190 (Summer '14).

Private Pilot Capacity

Capacity is still TBD. We hope to support at least 50–100 customers, but we may expand that capacity as needed or desired.

Customer Profile

Nominations are open to all customers and partners.

The ideal participant:

- Is a heavy user of activities
- Has a real and specific use case in mind
- Is willing to use the pilot feature in production at some point during the release

Feedback Requirements

You'll be expected to participate in feedback discussions related to the private pilot feature. You'll be added to the Activity Custom Lookups Private Pilot Chatter group in the Salesforce Success Community.

Feature Enablement and Setup

Once salesforce.com product management has enabled the pilot feature for you, no additional enablement is required. The feature will be available for your use, and administrators can add custom lookup fields to the Activity object.

> **Note:**
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> This feature is unavailable in releases earlier than 190 (Summer '14).

To set up the feature, create a custom field on the Event or Task object using Lookup Relationship as the field type. For details, see Creating Custom Fields.

Customer Support

Salesforce customer support will provide limited support for the pilot. Support agents will attempt to provide technical support and escalate to the product manager as necessary. However, Salesforce

customer support may not prioritize or escalate investigation of issues related to the pilot. Customers can also ask for help in the Activity Custom Lookups Private Pilot Chatter group.

Plan for General Availability

General availability of the feature is targeted for the Winter '15 release. However, salesforce.com can't guarantee general availability of this feature. You shouldn't make purchasing decisions until the feature is generally available.

Considerations

Custom Lookups Can Only Reference One Type of Object, One Object at a Time

Each custom lookup field can only reference one type of object and only object at a time. If you need to reference multiple objects, create multiple custom lookup fields—one per object.

Custom Lookups Don't Control Activity Sharing

An object referenced by a custom lookup isn't considered a parent of an activity—the lookup is just a simple reference. Therefore, referencing another object using an activity custom lookup doesn't affect the visibility of the activity in any way.

Private Pilot Feature Limitations

Activity Lookup Related List Is Unavailable in the API and Salesforce1

The related list of activities on the object referenced by the lookup isn't available in the API or in Salesforce1. For example, if you use the pilot feature to create a custom lookup from an activity to an opportunity, then you can add a related list to the Opportunity page layout that shows all the activities related to the opportunity through your custom lookup, but this related list isn't available in the API or in Salesforce1.

Activity Lookup Fields Are Unavailable in Custom Report Types for Join

You can't use the custom lookup relationship to join an activity to other objects.

Activity Lookup Related List Doesn't Support Custom Sorting

The related list of activities from the custom lookup is sorted by ActivityDate, DESCENDING (that is, starting with the activity farthest in the future and continuing into the past). You can't customize this sorting.

Only One Activity Lookup Related List Is Supported per Custom Lookup Field

A custom lookup field has only one related list of activities. The same related list includes both open and closed activities, in contrast with the existing Open Activities and Activity History related lists of activities related through the Name and Related To fields.