

Chatter Unfollow Rules Overview

John Kucera
Product Manager – Salesforce Chatter
jkucera@salesforce.com

Chatter has a 500 following limit

- If you hit the limit, you:
 - Can't follow more people
 - Can't follow more records
 - Don't auto-follow new records you create
- Case reps and Sales reps working with leads tend to hit the limits first as they create lots of new records

Share



Ricky East

[User Detail](#) | [Help for this Page](#) ?



Error: You are subscribed to the maximum number of records. Unsubscribe from another record and try again.



Lead

John Smith

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help](#)

 Hide Chatter

New!

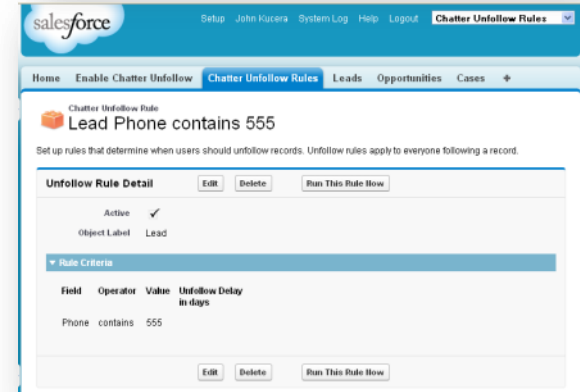
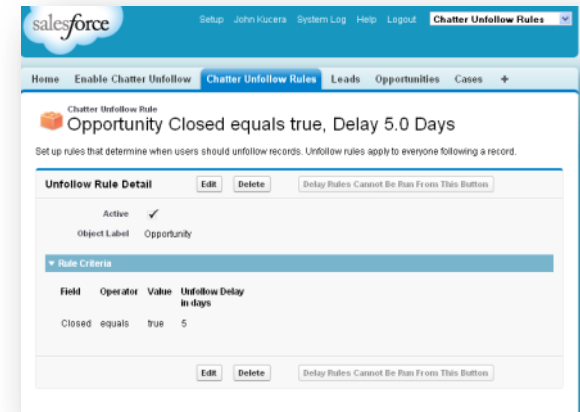


Error: You are subscribed to the maximum number of records. Unsubscribe from another record and try again.

Never miss important posts with the Chatter Unfollow Rules app!

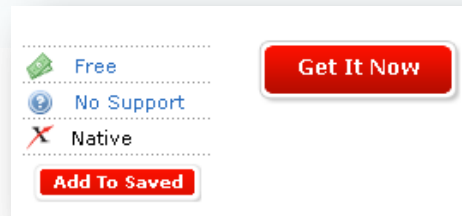
Share

- Create rules that unfollow everyone from records automatically each evening
- Example Rules
 - Cases:
 - Unfollow closed Cases 5 days after they close
 - Unfollow all Cases 90 days after they are created
 - Opportunities:
 - Unfollow closed Opportunities 5 days after they close
 - Unfollow Opportunities where Amount is less than \$10,000
 - Unfollow Opportunities where Probability = 0%
 - Leads:
 - Unfollow all Leads 150 days after they are created
 - Unfollow Leads where the phone number contains “555”
 - Unfollow Leads where the email contains “gmail”



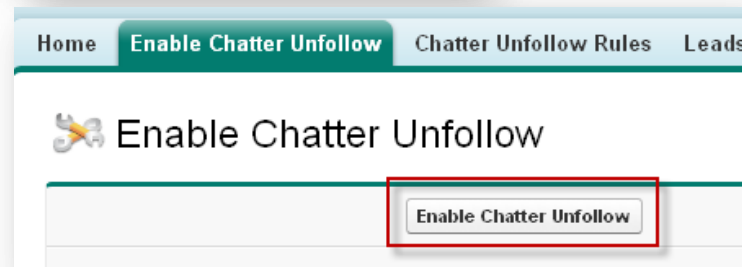
How to Set Up and Use the App

1. Install the App



Share

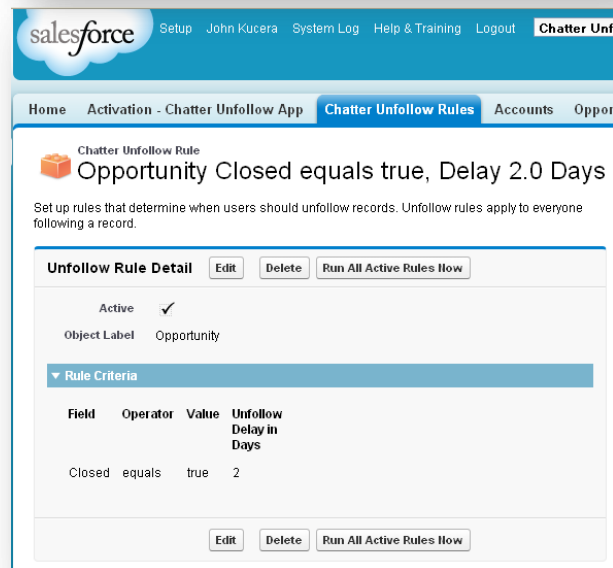
2. Activate the app



3. Create new active rules

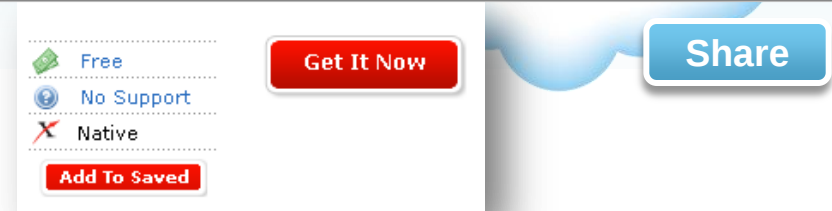
4. Limitations & Gotchas

5. Technical Considerations

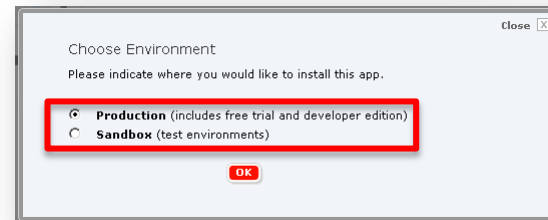


1) Install the app

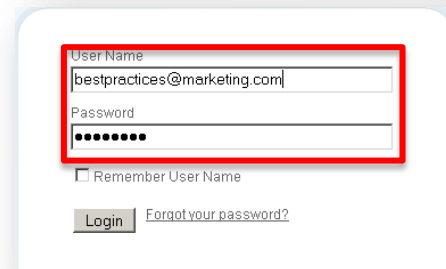
1. Click on Get it Now



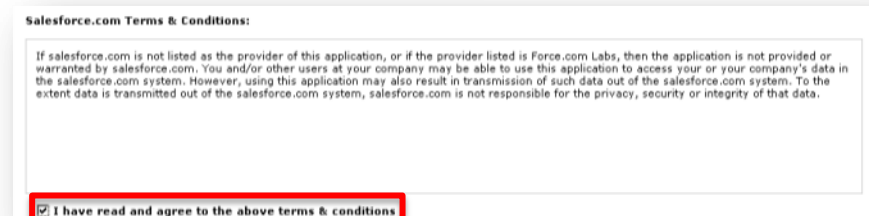
2. Decide between deploying to production, or your Sandbox if you have one



3. Log In with your System Administrator salesforce login

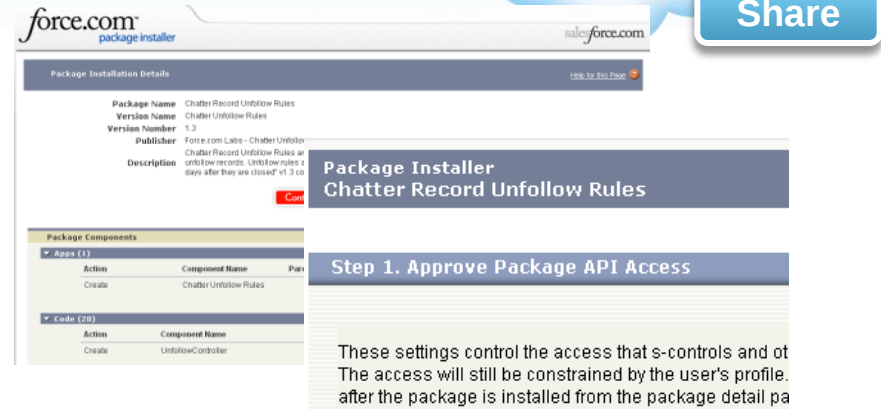


4. Agree to terms & conditions



1) Install the app (continued)

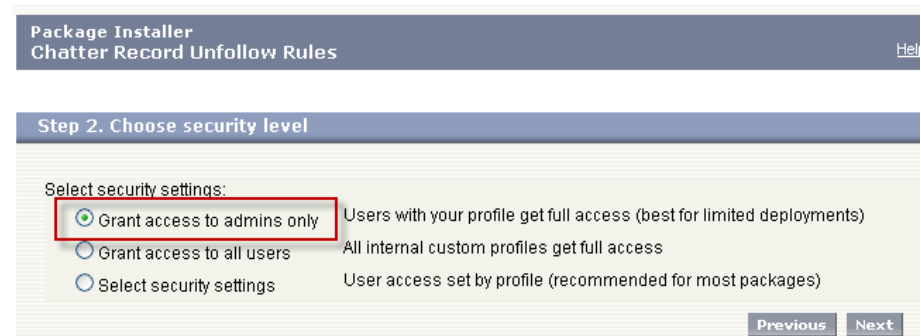
5. Click Continue & Approve API Access



The screenshot shows the 'Package Installation Details' page for the 'Chatter Record Unfollow Rules' package. The package name is 'Chatter Record Unfollow Rules', version is '1.3', and the publisher is 'Force.com Labs - Chatter Unfollow'. The description states: 'Chatter Record Unfollow Rules is an unfollow records. Unfollow rules is days after they are closed v1.3 (0)'. A red 'Continue' button is visible. Below the details, there are sections for 'Package Components' showing 'Apps (1)' and 'Code (20)'. To the right, a 'Share' button is present. Further right, a section titled 'Step 1. Approve Package API Access' contains text: 'These settings control the access that s-controls and ot The access will still be constrained by the user's profile. after the package is installed from the package detail pa'.

6. Grant Access to Admins Only

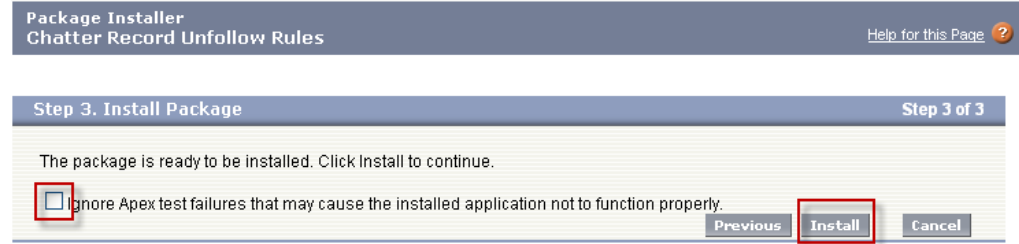
- A rule unfollows all people from a record, so only admins should create rules to minimize the risk of mistakes
- You can allow other profiles access, but ensure they know their rules affect everyone, not just themselves



The screenshot shows the 'Step 2. Choose security level' screen. It asks to 'Select security settings:' and provides three options: 'Grant access to admins only' (selected), 'Grant access to all users', and 'Select security settings'. The descriptions for each option are: 'Users with your profile get full access (best for limited deployments)', 'All internal custom profiles get full access', and 'User access set by profile (recommended for most packages)'. 'Previous' and 'Next' buttons are at the bottom right.

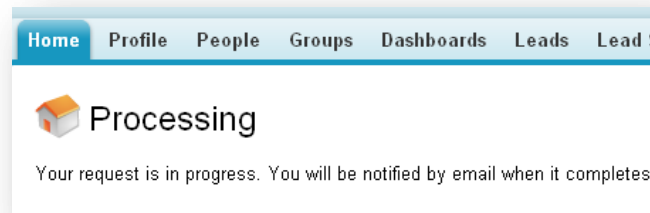
1) Install the app (continued)

7. Optional – if you have test failures from other apps, the failures will prevent the app from installing. If necessary, override Apex Test failures



8. Click Install

- You may see a “Processing” screen as the app has a lot of tests to make sure it works the way it is supposed to.
- “My install failed – now what?”
 - See next page



My install failed – what now?

Share

- If you have test failures upon install, you may want to click “Ignore Apex Test Failures”
- Reasons why test failures may occur:
 - You have required custom fields on Opportunity, Lead or Case
 - You use triggers or validation rules to fail saves on Opportunities, Leads, or Cases if not formatted properly
- “But I thought I should never ignore test failures? What are the risks?”
 - Your code coverage will go down if you ignore test failures as the tests won’t pass
 - The app may not work given conflicts with other code in your org

Extra line breaks in this message were removed.

From: support@salesforce.com
To: John Kucera
Cc:
Subject: Package "Chatter Record Unfollow Rules Chatter Unfollow Rules" Install Failed

Sent: Sat 9/18/2010 1:08 PM

Your request to install package "Chatter Record Unfollow Rules Chatter Unfollow Rules" was unsuccessful. None of the data or setup information in your salesforce.com organization was affected.

If your install continues to fail, contact Salesforce CRM Support through your normal channels and provide the following information.

Organization: Unfollow Test (00D300000000nWMX)
User: John Kucera (005300000031bqg)
Package: Chatter Record Unfollow Rules (04t500000001j2w)

Problem:

1. Apex Classes(01p300000000c1R) unfollowtests.testUnfollowRunAllRulesButtonDelayRules();

29 External entry point;
; first error: **FIELD_CUSTOM_VALIDATION_EXCEPTION**, If the
ed field.: [StageName]

Validation Errors While Saving Record(s)

There were custom validation error(s) encountered
encountered was "00D300000000nWMX: APEX_TEST_FAILURE
unfollowtests.testUnfollowRunAllRulesButtonDelayRules()
unfollowtests.testUnfollowRunAllRulesButtonNoDelayRules()
unfollowtests.verifyPicklistEquals();

1) Install the app (continued)

9. Finally, click Deploy Now to complete installation

Share

Install complete

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, or fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, the user is the user who installed the package.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time from the package detail page.

Deploy Now **Deploy Later**

Deploy Package [Help for this Page](#)

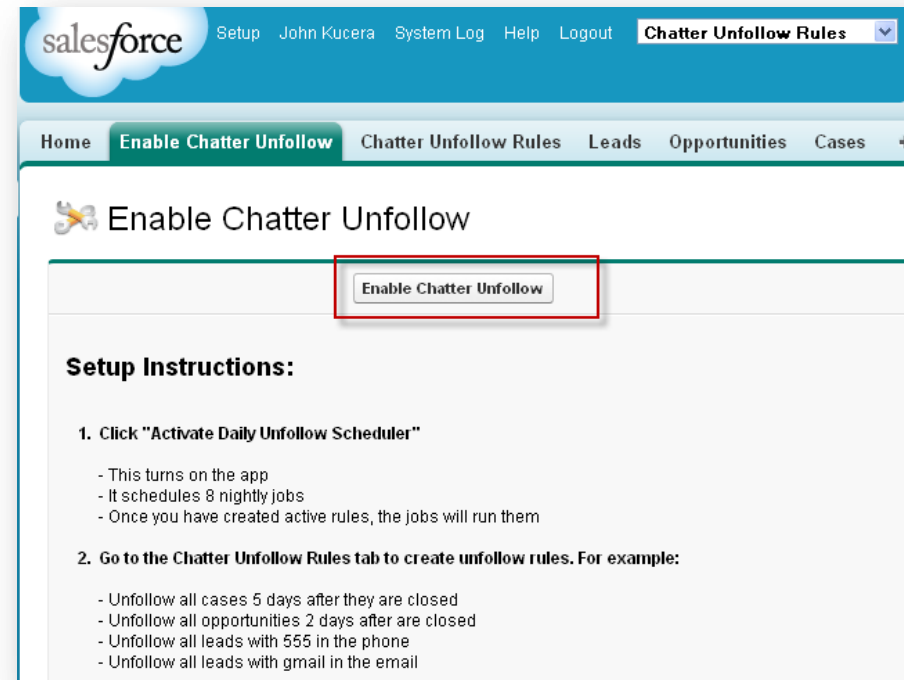
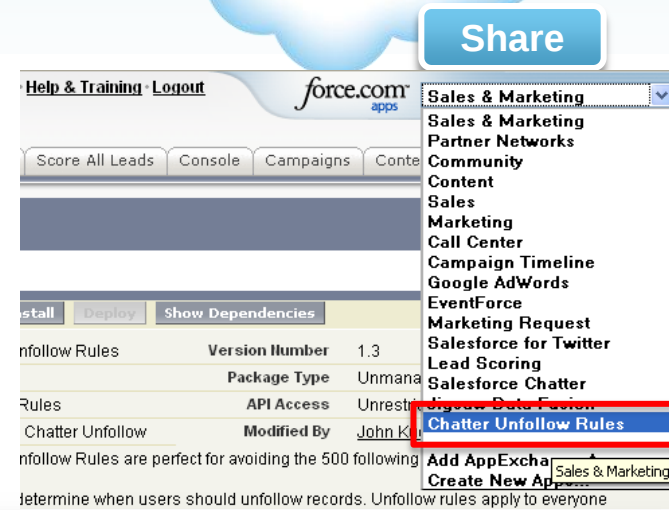
Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Package Components		
Action	Name	Type
	Chatter Unfollow Batch Job Queued	Custom Object
	Chatter Unfollow Delayed RecordId	Custom Object
	Chatter Unfollow Rules	Custom Object

Deploy **Cancel**

2) Activate the App

- Once activated, the app checks for active rules every evening and then processes those rules
- If not activated, the rules are never run
- To activate the app, click on the “App Picker” (top right) and select “Chatter Unfollow Rules”
- Now select the “Activation – Chatter Unfollow App” tab
- Click “Activate Chatter Unfollow App”
 - You will see a confirmation, and the button will be disabled
 - Questions on how it works? See the Technical Considerations



3) Create new Chatter Unfollow Rules

- Select the “Chatter Unfollow Rules” tab
- Click New to create a new rule
- Check Active – inactive rules don’t run each night
- Select the object, such as Opportunity
 - If you don’t see the object you need, click the “Show all objects” checkbox
- Select the Field Name, Operator and Value such as “Closed” “equals” “checked”
- Save the rule
- Now each evening, this rule will run and save the recordId’s of all closed opportunities. 2 days later, everyone will be unfollowed from those records

Share

The screenshot shows the 'Chatter Unfollow Rule' configuration page in a Salesforce-like environment. The top navigation bar includes 'Home', 'Activation - Chatter Unfollow App', 'Chatter Unfollow Rules' (selected), 'Accounts', 'Opportunities', and 'Ca'. Below the navigation bar is a header section with a cube icon and the title 'Chatter Unfollow Rule'. A descriptive text states: 'Set up rules that determine when users should unfollow records. Unfollow rules apply to everyone following a record.' An example is provided: 'Example: To unfollow users from opportunities in Closed Won status two days after they close, you would select: Object Name = Opportunity, Field Name = Stage, Operator = Equals, Value = Closed Won, Unfollow Delay = 2'. The main form area is titled 'Chatter Unfollow Rule' and contains three steps: Step 1: Select Object, Step 2: Define Criteria, and Step 3: Set Unfollow Delay (optional). Step 1 shows a list of objects with 'Opportunity' selected. Step 2 shows a table with 'Field Name' (Closed), 'Operator' (equals), and 'Value' (checked). Step 3 shows 'Unfollow Delay in Days (optional)' set to 2. Buttons for 'Save', 'Save & New', and 'Cancel' are at the top right of the form.

Home Activation - Chatter Unfollow App Chatter Unfollow Rules Accounts Opportunities Ca

Chatter Unfollow Rule

Set up rules that determine when users should unfollow records. Unfollow rules apply to everyone following a record.

Example: To unfollow users from opportunities in Closed Won status two days after they close, you would select: Object Name = Opportunity, Field Name = Stage, Operator = Equals, Value = Closed Won, Unfollow Delay = 2

Chatter Unfollow Rule Save Save & New Cancel

Active ☒

▼ Step 1: Select Object

Object Name: Keyword Lead Lead Scoring Rule Line Item Schedule Lineitem Override Marketing Request Offer Opportunity

Don't see what you need? Show all objects ☐

▼ Step 2: Define Criteria

Field Name	Operator	Value
Closed	equals	☒

▼ Step 3: Set Unfollow Delay (optional)

Unfollow Delay in Days (optional) 2

Optional: Run a rule without Unfollow Delay immediately

Share

- If you want to a rule with no unfollow delay, click into any rule
- Then click “Run This Rule Now”
- You will receive an email upon completion
- Notes:
 - Any rule with Unfollow Delay >0 will not have this button enabled.
 - This tool is meant to immediately test rules with no delay in a developer or sandbox org
 - Also note batch jobs can take a while to complete. You can monitor here:
 - Setup→Monitoring→Apex Jobs
- **Warning!**
 - Clicking several times could delay your normal evening jobs, or other batch jobs you have scheduled

The screenshot shows the Salesforce interface for managing Chatter Unfollow Rules. The top navigation bar includes links for Home, Enable Chatter Unfollow, Chatter Unfollow Rules (selected), Leads, Opportunities, and Cases. The main heading is 'Chatter Unfollow Rule' with a sub-heading 'Lead Phone contains 555'. Below this, a description states: 'Set up rules that determine when users should unfollow records. Unfollow rules apply to everyone following a record.'

The 'Unfollow Rule Detail' section contains the following information:

- Active:** ☒
- Object Label:** Lead

The 'Rule Criteria' section is expanded, showing a table with the following data:

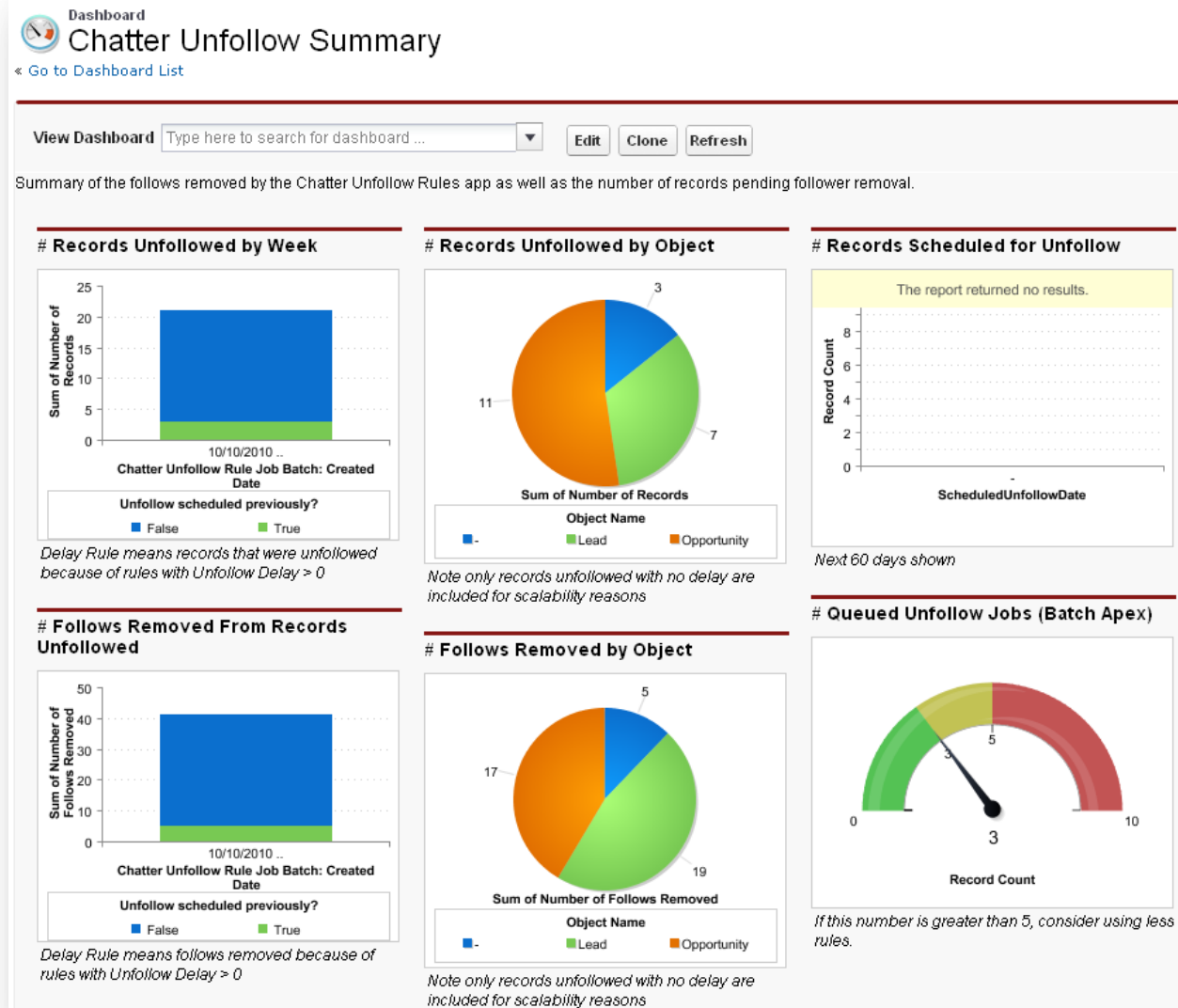
Field	Operator	Value	Unfollow Delay in days
Phone	contains	555	

At the bottom of the 'Unfollow Rule Detail' section, there are three buttons: 'Edit', 'Delete', and 'Run This Rule Now'.

Optional: Monitor progress with the Dashboard

Share

- See how many records were unfollowed
- See how many total people * records were unfollowed
- Monitor if you are getting close to the Jobs limit
- See if you have any pending jobs



Limitations & Considerations

Share

- Contact jkucera@salesforce.com for support
- Maximum # Active Rules: 100 active rules
- This app is an Aloha app, so it doesn't add to your tab count
- Rules are not run immediately – they are instead run each evening
- Batch jobs figure out the records to unfollow – they scale up to 50mil records per object
- This app cannot be used for unfollowing people – that would be mean ☹️
- The following field types cannot be used as criteria for any rules:
 - Id (lookup fields) & Reference
 - Multi-Select picklists
 - TextArea
 - Encrypted Strings, Base 64
- This app uses batch apex & asynchronous apex, which could impact you if you have other code or other apps using those features (see next page for details)

Technical Considerations (for orgs with apex code)

Share

- If you use **Batch Apex** in your org note:
 - Batch Apex has a maximum of 5 jobs running or pending at one time
 - If you are already at your limit when the scheduler wakes up, it will queue jobs to be run later.
 - In extreme cases, if you have a lot of different rules active, the app will not run each rule every evening.
 - If you click on “Run Active Unfollow Rules” while you have 5 other batch apex jobs running, the Unfollow jobs will be queued up to be run at a later time.
- If you use **Scheduled Apex** note:
 - Scheduled Apex limits you to 10 active scheduled jobs. This app adds 3 when you click “Activation – Chatter Unfollow App”
 - If you have more than 2 jobs already running, the button click may fail
 - Contact jkucera@salesforce.com for a workaround if this happens to you
 - “Can I delete some of the 3 jobs?”
 - Yes, but it may mean your queue of batch jobs gets backed up
 - To delete them, navigate: Setup→Administration Setup→Monitoring→Scheduled Jobs
 - Only delete from the “Try Unfollow Batch Jobs Again” jobs – there are 6 total
 - Deleting the other jobs will stop the app from working properly
 - “I want to unfollow at different times than you set up – can I do this?”
 - Yes – but note that in the code any job that runs at 10am today counts as “yesterday” for the purpose of calculating the # days to wait until unfollowing records found from rules with an Unfollow Delay
 - To change the times, navigate: Setup→Administration Setup→Monitoring→Scheduled Jobs
 - Click on Manage, and change the timing.

How the batch queue works

Share

- 1) Try to schedule all rules where Unfollow Delay = 0
- 2) Try to schedule all rules where Unfollow Delay > 0
- 3) If batch queue full, add all remaining jobs to the custom object UnfollowBatchQueue__c

- 6) Check if there are any jobs that couldn't be run in steps 1-5. If so, try to load them now

8) Same as #6

10) Same as #6

12) Same as #6

- 4) Check UnfollowQueue__c if there are any records where Scheduled Unfollow Date ≤ TODAY. If so, unfollow everyone from those records
- 5) If the batch queue full, add this job to UnfollowBatchQueue__c

7) Same as #6

9) Same as #6

11) Same as #6

Time of Day 11pm 12am 1am 2am 3am 4am 5am 6am 7am