SUMMER '07 ADMINISTRATOR PREVIEW

Now Part of Unlimited Edition: Apex Code, the World's First Multitenant Programming Language

Raising the Bar for On-Demand Success with:

First On-Demand Multitenant Programming Language – Apex Code
First On-Demand Intelligent Workflow
First On-Demand Collaborative Customer Portal
First On-Demand Development Environment with Multiple Sandboxes

Salesforce sfa

Deliver Greater Success to Your Sales Team—on Demand

Salesforce service & support

Turn Your Agents into Heroes and Your Customers into Evangelists

Salesforce prm

Make Partners as Successful as Direct Sales

Salesforce marketing

Manage Your Entire Marketing Mix in Salesforce

Apex

Develop and Manage All Your Applications on Demand

Successforce.com

Tap into the Collective Wisdom of the Community

SALESFORCE

salesforceservice&support

CUSTOMER PORTAL *(IN GENERAL RELEASE WITH SUMMER '07 – Enterprise and Unlimited Editions; Requires an Additional Fee)*

Embrace Your Customers

:: Elevate the self-service experience with a fully customizable portal
:: Share any data, any application, any Web service
:: Empower your entire organization to engage with customers

Summer '07 ushers in a new era of customer self-service with the general availability of the highly anticipated Salesforce Customer Portal (formerly known as AppSpace). Everyone in your company can truly collaborate with your customers in the secure, branded, online Customer Portal. In addition to resolving customer service and support inquiries, your customers can also use the portal to interact with other departments in your company, such as project management, billing, delivery/fulfillment, and more. With a fully customizable user interface and the ability to easily share data and applications with customers, the Customer Portal helps you deliver the stellar customer experience that you envision.

- **Multiple Personalized Portals**
  You can create multiple personalized portals for any customer segment. Set up uniquely branded portals customized to the needs of distinct customer groups or VIP customers, or product-specific portals to engage customers of each product. Alternatively, you can enable customers to log on to the distinctly branded portals of your multiple business units, while you maintain a single customer database. With personalized portals, you can create as many unique experiences as your business model requires.
- **Self-Resolution with Suggested Solutions**
  Automatically display matching solutions when a customer creates a case through the portal, and guide the user to close the case if one of the solutions solves the problem. With suggested solutions, you can accelerate the resolution of customer issues while allowing your agents to focus on more complex issues.
- **My Profile**
  Streamline the customer experience by allowing portal users to update their own user profiles. Portal users can view and edit their user and contact information, thus reassuring both you and your users that their information is accurate and up to date.
- **New Internal User Group**
  A new default sharing group strengthens confidentiality by allowing you to easily share data with your employees only. Customer Portal users are automatically excluded when you choose the "Roles and Internal Subordinates" option in sharing rules. In addition, when you first roll out the Customer Portal and wish to set all your data as internal-confidential by default, an easy-to-use wizard helps you automatically choose this option across all your sharing rules.
- **Additional Custom Branding**
  With Summer '07, you can customize the look and feel of your pages for log-in, forget password and change password pages so that your own branding and messaging is included. In addition, with the enhanced style editor, you can easily select the color scheme of your Customer Portal and see the changes in preview mode before they are made.

Note: The Salesforce Customer Portal is a fee-based license option that is available for Enterprise and Unlimited Edition customers. To activate or learn more about the Customer Portal, contact your salesforce.com representative.

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Salesforce service & support

RICH-CONTENT SOLUTIONS *(Professional, Enterprise, and Unlimited Editions)*

Graphical Content for Your Knowledge Base

:: Include pictures, diagrams, and other rich content in solutions
:: Add graphics to solutions that are difficult to explain with text alone
:: Increase customer satisfaction and resolve issues faster

The solutions knowledge base in Salesforce Service & Support is a valuable resource for agents—and customers—seeking to resolve issues. With Summer '07, your solutions take on a whole new look and feel. Rich-content solutions take you beyond simple text by allowing you to create solutions in HTML. You can communicate even complex information much more clearly by including rich formatting, diagrams, and graphics, increasing customer success and satisfaction.

- **HTML Content**
  Expand the value of your solutions knowledge base by providing richly formatted solutions with pictures and diagrams.
- **Public Knowledge Base and Customer Portal**
  Allow customers to search and browse rich-content solutions via the public knowledge base or the new Customer Portal (see page 2).
- **Graphical Representation of Complex Ideas**
  With access to rich content with diagrams, graphics, and rich formatting, customers will better understand complex solutions and derive greater value from your knowledge base. With clear, easy-to-follow solutions available via self-service, customer are less likely to log a new case or call your service center, and customer satisfaction increases.

Note: This feature is enabled by default but requires administrator activation in the set up area of Salesforce.

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Salesforce service & support

ASSIGNMENT AND ESCALATION FORMULAS *(Professional, Enterprise, and Unlimited Editions)*

Faster, More Compact, More Powerful Rules

:: Easily create sophisticated assignment, escalation, and auto-response rules
:: Reduce the total number of required rules

With Summer '07, you can more efficiently write case assignment and escalation scenarios. With new logic and formulas, you have the flexibility to easily create sophisticated rules. This expanded logic allows you to reduce the number of rules needed by an order of magnitude, greatly improving system performance and simplifying debugging.

- **Boolean Logic**
  Use Boolean logic—including the AND, OR, and NOT—functions, to simplify your case assignment and escalation rules. Streamline your rules by mixing these functions in multiple combinations.
- **Formulas**
  Create formula-based case assignment and escalation rules. Expand your ability to create flexible case assignment and escalation rules that mirror your business processes. For example, you can

write a rule that detects if a single field in a case has changed and assigns the case based on that finding.

Note: This feature is enabled by default.

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salesforceprm

ACCOUNTS FOR PARTNERS *(Enterprise and Unlimited Editions)*

Closer Collaboration with Your Partners

:: Empower partners to manage their accounts
:: Improve sales effectiveness by sharing customer information with partners

With Summer '07, you can make your partners as effective as your direct sales force by providing partners with controlled access to accounts. Increase partner adoption and reduce data duplication by enabling your partners to manage their accounts directly from Salesforce PRM. With this feature, both you and your partners always have the same up-to-date customer information needed to win more deals.

- **View, Create, or Update**
  Partners can create accounts or view and update those that you share with them. When you enable accounts, the appropriate tab will be visible to your partners when they log in to Salesforce PRM.
- **Custom Page Layout**
  You can create a custom layout for the account pages that your partners see. Select the data fields that you want to share with partners to maintain data confidentiality and deliver an uncluttered view.
- **New Internal User Group**
  A new default sharing group strengthens confidentiality by allowing you to easily share data with your company's employees only. Your partner users are automatically excluded when you choose the "Roles and Internal Subordinates" option in sharing rules. In addition, when you first roll out Salesforce PRM and wish to set all your data as internal-confidential by default, an easy-to-use wizard helps you automatically choose this option across all your sharing rules.

Note: This feature will be available in the weeks following the Summer '07 release. It is disabled by default but can be enabled by the organization's salesforce.com administrator.

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salesforcemarketing

SALESFORCE GROUP EDITION FEATURING GOOGLE ADWORDS *(Replaces Team Edition)*

Acquire New Customers and Grow Your Business

:: Leverage Google AdWords to drive Web site traffic
:: Capture new leads from your Web site
:: Effectively manage interactions with leads and contacts

Even small and mid-sized companies can manage sales and marketing initiatives on demand with the new Salesforce Group Edition featuring Google AdWords. Salesforce Group Edition provides an integrated and effective solution that gives every small company all the tools it needs to acquire new customers and grow its business. By encapsulating every element of the customer lifecycle—advertising, creating leads, closing business, and retaining customers—in a single solution, Group Edition enables any company to jump start its business by creating an instant online marketing and sales presence.

- **Search Advertising**
  With Salesforce Group Edition featuring Google AdWords, companies can easily use Google AdWords to create online ads. When people search the Web for the products and services that your company sells, your ads appear with the relevant search results on Google or Google partner Web sites. When searchers click on your ad, they are taken to your Web site.
- **Lead Capture**
  Once you have potential customers on your Web site, you can entice them to fill out a name capture form by offering them something, like a a price quote, a product demonstration, or sales materials. The information collected on the form flows directly into Salesforce as a new lead.
- **Customer Acquisition**
  As soon as a lead is added to Salesforce, it is distributed to the sales team. Group Edition helps businesses effectively manage and share leads, track opportunities through the sales cycle, and close deals more quickly. Sales teams can manage all customer interactions in Salesforce and turn qualified leads into new business.
- **Growth Dashboards**
  Group Edition features dashboards that give companies a bird's-eye view of lead generation, sales metrics, and company growth. Dashboards and reports provide quick and easy access to real-time information and allow companies to make decisions quickly and alter advertising strategies to get the best bang for the buck.
- **Additional Business Applications**
  Through the power of salesforce.com's AppExchange marketplace, customers have the opportunity to add many of the 600 business applications and add-ons to Salesforce, including mapping and productivity apps.

Note: Salesforce Group Edition featuring Google AdWords is a standalone product. Salesforce for Google AdWords is also included in all other Salesforce Editions.

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salesforceprm

PARTNER-CREATED OPPORTUNITIES *(Enterprise and Unlimited Editions)*

Streamline the Partner Experience

:: Simplify your channel sales process
:: Enable your partners to initiate opportunities

Summer '07 streamlines your channel sales process by allowing your partners to create sales opportunities directly in Salesforce PRM. Your partner sales reps can create an opportunity from the home page and link it to the relevant account using the account lookup. You can maintain data security and protect sales territories by specifying the accounts for which partners can create opportunities.

Note: This feature will be available in the weeks following the Summer '07 release. It is disabled by default but can be enabled by the organization's salesforce.com administrator.

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ADVANCED MASS EMAIL *(Professional, Enterprise, and Unlimited Editions Except as Noted)*

High-Touch, Easy-to-Manage Email Communications

:: Send personalized emails to multiple users with a few clicks
:: Schedule mass email delivery at your convenience
:: Simplify administration of mass emails

Break free of the chains of email software. Now that you're using Salesforce to send individual emails to your contacts, why not also use it to send mass emails? With Summer '07, you don't have to install software or download add-ons to send mass personalized emails right from Salesforce.

- **Scheduled Email Delivery**
  Want a mass email to go out at the crack of dawn? You can make it happen without setting your alarm with Summer '07. You can select the date, time, and time zone of your mass email so that your message can go out at the precise time you want without requiring your involvement at send time.
- **Tracking and Monitoring**
  Managing mass emails has never been easier. With Summer '07, you can see your scheduled and completed mass emails, cancel scheduled emails, and see which email templates you've used—all in one spot.
- **Higher Number of Mass Emails** *(Enterprise and Unlimited Editions Only)*
  Based on customer demand, Salesforce has increased the number of emails that can be sent with each mass mailing. Enterprise Edition customers can send 500 emails per mass mailing, while Unlimited Edition customers can send 1,000 emails per mass mailing.

Note: This feature is enabled by default.

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HISTORICAL CURRENCY EXCHANGE RATES *(Professional, Enterprise, and Unlimited Editions)*

Advanced Currency Management

:: Convert and freeze amounts based on the exchange rate at the opportunity close date
:: Trigger alerts and run reports based on correctly converted amounts
:: Analyze the impact of exchange rate volatility on opportunity amounts

Summer '07 delivers the advanced currency management you need to keep track of ever-changing exchange rates in the various geographies where you do business. With historical currency exchange rates, you can start tracking exchange rates when an opportunity closes, allowing you to accurately report opportunity converted amounts based on the exchange rate at the opportunity's close date while still keeping track of fluctuations after that point as well. Since these historic exchange rates are stored, all alerts and reports can include the opportunity amount based on the exchange rate at the close date rather than the exchange rate at the time that the report or alert is generated.

- **Relevant Exchange Rates**
  Assess an opportunity in a foreign currency according to the exchange rate that was relevant for the company at the time the opportunity closed.

- **Cross-Currency Analysis**
  Maintain and view multiple exchange ranges for any given currency and observe how exchange rates change over time. Analyze cross-regional current and past sales pipelines in a single corporate currency.

Note: This feature is disabled by default. Contact your salesforce.com representative to activate this feature.

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CUSTOM REPORT TYPES *(Professional, Enterprise, and Unlimited Editions)*
Greater Customer Insight

:: Create your own custom report types
:: Report on new combinations of objects and relationships
:: Customize the report wizard for end users

Looking for ways to deepen your organization's understanding of your customers? With custom report types, administrators can generate new report types and include them in the reporting wizard so end users can get more insight into your customers.

- **Reporting Objects and Relationships**
  Create reports on up to four parent-child and lookup relationships that users see in their views of Salesforce. For example, create a report type that accesses all accounts, with at least one contact, at least one opportunity, and displays the account creator's role.
- **Customizable Report Wizard**
  Customize the report wizard to make it easier for end users to create the reports they need. Administrators can group together and select the fields that are shown in the report wizard, making it easier for their users to find the fields they are seeking. Often-used fields can also be given prominence in the reporting wizard, further reducing the time it takes to create a report. In addition, administrators can modify the view picklist in the reporting wizard, making it easier for end users and managers to set the scope of the reports they create.

Note: This feature is enabled by default.

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INTELLIGENT WORKFLOW *(Enterprise and Unlimited Editions)*
Magnify the Power of Workflow Rules

:: Add sophisticated logic to your workflow rules
:: Automate more of your business processes
:: Run your entire business with greater efficiency

Unleash the full power of workflow and approvals with Summer '07. With the new ability to incorporate formulas in workflow rules and approval processes, you can create powerful new rules that match even your complex business processes around lead assignment, automated response, email alerts, case escalation, case assignment, approvals, and much more. You can write for a greater variety of business scenarios, increasing your flexibility and efficiency.

- **Workflow and Approval Formulas**
  Use powerful logic formulas in workflow to create more sophisticated processes. For example, use formulas such as ISCHANGED and PRIORVALUE to build workflow rules that can be used to track changes to field values. With these formulas you could generate an email notification for the appropriate sales executive when the owner of a large account is changed, for example.
- **Dynamic Email Recipients**
  Automatically send personalized emails to any contact or user related to the record or even any email field on the record. For example, you could create a notification rule that sends a survey email to the case contact seven days after a case is closed.
- **User-Threshold-Based Approval Processes**
  Use formulas in approval process steps to build user-threshold-based approval processes. For example, you could build a discount approval process that automatically navigates your discount approval hierarchy and routes to another level based on a discount threshold at each level.
- **Skip Approval Step**
  Build flexible, multistep approval processes where approval steps can be conditionally executed or skipped. For example, you could create a single campaign budget approval process where all campaigns are routed through a two-step process if the amount is less than $25,000 and through a three-step process for all campaigns budgeted over $25,000.
- **Record-Owner-Approval Hierarchies**
  With Summer '07, approval processes can be configured to route requests using the hierarchy of the record owner, irrespective of who submitted the record for approval.
- **Time-Based Workflow in Hours**
  User time-based workflow rules to take pro-active actions with a granularity of just hours. For example, send email reminders to your marketing managers if a lead is in the assigned queue for more than 12 hours.

Note: This feature is enabled by default.

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CONTACT SHARING *(Professional, Enterprise, and Unlimited Editions)*

Greater Control of Shared Contacts

:: Strengthen the confidentiality of contact information
:: Share one global account while limiting access between business units/regions

With Summer '07, it's easier than ever to control who within your organization can see specific contacts related to a shared account. With new contact sharing, you have more flexibility to foster collaboration while maintaining confidentiality. You can choose from the following options for default contact access:

- Controlled by Parent (Account)
- Private
- Public Read Only
- Public Read/Write

You can also create contact sharing rules and manually share contacts to selectively grant contact access to specific users or groups.

- **Share by Account Team**

You can provide general access to account information while limiting access to contact information to the account team only.

- **Share by Business Unit or Region**
  For companies that do business in multiple geographies or have multiple teams serving a single account, sharing rules can grant each team or location access to only their own contacts, while still maintaining a single, shared source of account information, helping to maintain contact confidentiality and improve usability.
- **Privacy for Users' Contacts**
  Users can only see their own contacts or those that are shared with them to maintain the confidentiality of the contacts that individual reps don't want everyone to have access to.
- **Manual Contact Sharing**
  Users can grant other users access to a single contact record without giving access to the other contacts associated with the same account.

Note: This feature is enabled by default but requires administrator activation in the set up area of Salesforce.

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EXTENDED CUSTOMIZABLE HELP *(All Editions)*

Tailored Help Where Users Need It Most

:: Accelerate user training
:: Provide quick-and-easy access to customized help
:: Streamline the user experience

Training and providing help to users is easy with Summer '07. New customization options are available, allowing you to provide the guidance your users need to get up and running. Users can access this help quickly, either through hovers (for field-level help) or though the standard "Help for this Page" link (for custom objects).

- **Field Help Hovers**
  Field help hovers allow users to learn about a field by simply moving the mouse over the field name. With Summer '07, administrators can provide a 255-character explanation for any custom field, and the custom help text is automatically accessible to users without the need for extra mouse clicks. A small help indicator will appear next to fields for which administrators have specified help text. When a user hovers over the field, the icon lights up and displays the text provided.
- **Context-Sensitive Help for Custom Objects**
  Using a custom s-control, administrators can create customized help documentation for any custom object. When a user clicks any context-sensitive "Help for this Page" link, your custom help information is displayed in a new window.

Note: This feature is enabled by default.

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LOOKUP HOVERS *(All Editions)*

A "No-Click" Sneak Peek

:: Preview the contents of a record before clicking a link
:: Tailor your own hover layout

Hovers, one of the most popular Salesforce features, are being extended across other areas of the Salesforce user interface. With lookup hovers, you can point your mouse to a link that looks up another record and immediately see a pop-up summary of its content in a mini page layout. For example, in an opportunity record, you can move your mouse over a link of the account name, and a summary of the account will pop-up in a window without requiring a click.

- **Hover Detail on Lookup Field**
  Users can hover over a lookup field on a detail page for a quick view of the most important details without clicking.
- **Mini Page Layout Configuration**
  Administrators can configure mini page layouts to select the fields that display when their users hover.

Note: This feature is enabled by default but requires administrator activation in the set up area of Salesforce.

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APEX

APEX CODE *(Unlimited Edition)*

Customize and Develop Anything on Demand

:: Build and customize apps using salesforce.com's Java-like programming language
:: Create powerful business logic that executes on our servers
:: Publish any method as a standard Web service

With the release of Summer '07, Apex Code becomes generally available for customers of Unlimited Edition. Apex Code, the world's first on-demand programming language, takes on-demand customization much further, allowing developers to customize business logic to create an entirely new class of features and apps. Apex Code—together with salesforce.com's renowned multitenant architecture and the Apex Web Services API—gives organizations all the tools they need to completely model their unique business processes with all the speed, power, and flexibility of on demand.

Note: For more information on Apex Code, visit the Apex Code page on the Apex Developer Network site.

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EXTENDED APPEXCHANGE PACKAGING *(All Editions, Except as Noted)*

Expand Your Application Universe

:: Create new applications based on business processes, analytics, or page layouts
:: Quickly package innovations for easy distribution
:: Cleanly uninstall applications

With Summer '07, developers can create more sophisticated applications that were not possible before. Salesforce.com has made it easier to package your custom business processes, reports, and home page layouts, enabling rapid sharing of ideas and innovations through the AppExchange marketplace.

- **Workflow Rules** *(Enterprise and Unlimited Editions Only)*
  You can package workflow rules in AppExchange applications with the Summer '07 release. With workflow, AppExchange applications can include more complex business process to meet the needs of more companies. In addition to workflow rules, you can also package field updates, outbound messages, alerts, and tasks.
- **Home Page Layout and Components**
  You can package custom home page layouts and components to share with others in your organization or the larger salesforce.com community through the AppExchange.
- **Language Translations** *(Professional, Enterprise, and Unlimited Editions Only)*
  Create a package of translated names, labels, and messages within the translation workbench to easily deliver multilingual applications on the AppExchange.

- **Custom Report Types** *(Professional, Enterprise, and Unlimited Editions Only)*
  You can package custom report types to help other Salesforce users achieve the insight you've gained. Create your own standardized reports and share them with others on the AppExchange. Users can use the reports or clone and further customize them for their unique needs.
- **Export on Uninstall**
  With Summer '07, you can automatically export data as you uninstall a package. The data export is performed automatically and is available for download as a zip file in a data archive, and the user is notified via email. This eliminates the need to perform a manual backup prior to uninstalling a package.

Note: This feature is enabled by default, with one exception: The ability to package language translations requires use of the translation workbench. Contact your salesforce.com representative to activate this feature.

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ROLL-UP SUMMARY FIELDS *(All Editions)*

Aggregated Information at Your Fingertips

:: Display summary data right on a record page
:: Eliminate the need to run a report to find summary information
:: Increase flexibility for workflow and validation rules

Fields that aggregate information from records in a related list are available with Summer '07. With roll-up summary fields, you can quickly see summarized information such as record count, total sum, largest value, or smallest value—all without running a report. For example, you can create a field that shows the lifetime invoice payments of a particular account or the total number of customer satisfaction surveys a contact has completed. Roll-up summary fields can also be included in workflow and validation rules, providing you greater flexibility in enforcing your business process. Roll-up summary fields support custom master detail relationships only in Summer '07.

- **Aggregate Information**
  Quickly create fields that summarize information on a record's related data, for quick review without having to run a report.
- **Filters**
  View summarized information specific to your business needs by creating filters to specify which records should be excluded from the roll-up summary field's value.
- **Multicurrency Support**
  View rolled-up summaries for fields with multiple currencies. Fields containing different currencies are automatically converted to the parent record's currency, providing support for truly global organizations.
- **Workflow and Validation**
  Roll-up summary fields can be included in workflow and validation rules, giving you more options for automating your business processes.

Note: This feature is enabled by default.

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MULTIPLE SANDBOXES *(Enterprise and Unlimited Editions; Requires an Additional Fee)*

Your Complete Testing Ground for New Apps

:: Develop, test, stage, and train concurrently with multiple, distinct Sandboxes
:: Enable various users to fully develop in their own Sandbox environments

The ability to fully develop and test new on-demand applications with Salesforce Sandbox was an extremely popular addition to the Apex platform. Since the introduction of Salesforce Sandbox with the Winter '06 release, users have been clamoring for more—requesting *multiple*, completely separate environments for testing, development, and training. With Summer '07, the dream becomes reality: You can create multiple Sandboxes in which developers can work concurrently to create, test, and QA apps, as well as separate versions for training users. Because each Sandbox is an isolated environment, users can work independently of one other without getting in each other's way.

- **Easy Administration**
  Easily view and manage all Sandboxes with an administrative screen. To help identify each of your multiple environments, each Sandbox can be named, and its status, description, and creation date are displayed on the administrative screen.
- **Independent Sandbox Refresh**
  You can choose when to refresh a particular Sandbox to ensure that your users have the appropriate versions they need. Each Sandbox can be refreshed 30 days after its last refresh.
- **Live Refresh**
  You can continue using a Sandbox even while refreshing it with a new copy—there's no downtime.
- **Refresh History**
  Easily view a Sandbox's refresh history, including information such as the refresh date and the user who performed the refresh.

Note: This feature requires an additional fee; contact your salesforce.com representative to activate multiple Sandboxes.

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EXTENDED MAIL MERGE *(All Editions – LIMITED RELEASE)*

Mass Personalized Documents on Demand

:: Create personalized letters, envelopes, and labels en masse
:: Track previous mail merge activities

Want to send personalized letters, envelopes, and labels to hundreds of accounts, contacts, or leads? With Summer '07, you can do so right from Salesforce, without requiring additional software or downloads. You can set up a mail merge in Salesforce to add a personal touch to your communications without spending the time to manually personalize each document.

- **Mass Mail Merge Wizard**
  The mass mail merge wizard makes it easy to identify the customers who need their documents personalized and then choose which type of document (e.g., letters, envelopes, or labels) to create. Next you receive an email containing your personalized documents or a link to them. You

can choose between having all the documents contained in one file for easy printing or in separate files for easy emailing.

- **Cross-Browser Support**
  Because you do not need to download a plug-in for this feature, it's available via any browser that you use to access Salesforce.
- **Activity Logging**
  An activity history record is logged in the background, allowing you to track previous mail merge activities.

Note: This feature is available on a limited basis with the Summer '07 release. To request access to extended mail merge during the limited release, please contact your technical support representative or customer success manager.

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ENHANCED ADMINISTRATION *(Enterprise and Unlimited Editions)*

Easier and More Flexible Administration

:: Delegate user support tasks to other users in your organization
:: Improve usability with easier page layout assignment

With Summer '07, administering Salesforce is easier than ever for large organizations. With enhanced administration, you can delegate support tasks to select individuals in your organization without granting full administrator access. Also, the new graphical user interface for assigning page layouts makes it easier to manage the multiple page layouts needed by your diverse set of users.

- **User Support Delegation**
  Enable delegated user administrators to login as users they administer to troubleshoot issues or provide assistance. Also, delegated administrators can unlock the users they manage.
- **Enhanced Page Layout Assignment**
  With Summer '07, it's easier for administrators to select which page layouts to use. The new AJAX user interface allows administrators to select multiple pages of record types all without refreshing the page. In addition, you can highlight a group of cells by clicking and dragging, highlight and mass change cells across multiple pages without losing previous selections, and, through the new onscreen shading and change counter, see all changes made prior to saving.

Note: User support delegation is enabled by default but requires administrator activation in the set up area of Salesforce. The enhanced page layout assignment feature is enabled by default.

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OTHER ENHANCEMENTS *(All Editions, Except as Noted)*

More Innovation in the User Experience

:: Present custom information on tab home pages
:: Navigate through your calendar more quickly

Summer '07 also brings many more community-driven ideas to make the user experience easier and richer than ever.

- **Tab Home Page Override** *(Enterprise and Unlimited Editions Only)*
  Tab home pages, which are displayed when any standard Salesforce tab or custom object tab is clicked, can be overridden with internal and/or external content using custom s-controls. You can change tab home page behavior to skip directly to a specific list view (e.g., "My New Leads") or bring in third-party mash-ups to display key information. Each object's list of standard buttons and links overrides will include this new option.
- **Calendar Enhancements**
  The improved calendar UI allows you to select months and years through a picklist, speeding up your ability to scroll through dates. The new calendar UI also features auto-completion on all date and date/time fields, allowing you to type in shortcuts (e.g., Mon, 5/22) and letting the app finish your work for you.

Note: These features are enabled by default. Calendar auto-completion is available in U.S. English only.

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SALESFORCE CONNECT FOR MICROSOFT OUTLOOK *(IN GENERAL RELEASE WITH SUMMER '07 – All Editions)*

Greater Efficiency for Dual Salesforce/Outlook Users

:: Keep data in sync no matter which app you're working in
:: Eliminate double entry
:: Increase user adoption

With the general availability of Salesforce Connect for Microsoft Outlook, you have the ability to fully connect Salesforce with Microsoft's popular email application. In addition to the email attachment, custom objects, and activity-object association features that were included in the limited release of Connect for Outlook, the version in general availability with the Summer '07 release includes several additional features to make your users more productive in working with Salesforce and Outlook.

- **Support for Windows Vista and Outlook 2007**
  With Summer '07, you can synchronize your data between Salesforce and the latest versions of Microsoft Windows and Outlook.
- **Email Attachments**
  To address the number-one user request for Connect for Outlook, users can upload attachments with emails in one easy step.
- **Support for Custom Objects**
  In addition to access for standard Salesforce objects, you can access your custom objects from within Outlook.
- **Activity-Object Association**
  Create associations between activities in Outlook and objects in Salesforce; for example, associate an Outlook meeting with a Salesforce lead and opportunity.
- **Quick Create**
  Save time by also adding new contacts, leads, and accounts to Salesforce directly from Outlook at the same time you add an email or case.

Note: This feature is enabled by default.

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SALESFORCE CONNECT FOR LOTUS NOTES *(All Editions)*

A Productivity Boost for Your Users

:: Keep data in sync no matter which app you're working in
:: Eliminate double entry
:: Increase user adoption

Summer '07 makes it easier for Lotus Notes users to synchronize their data with Salesforce. In addition to the email, contacts, calendar, task, and address book synchronization available in previous versions of Salesforce Connect for Lotus Notes, this version adds new features for even great productivity.

- **Support for Windows Vista and Lotus Notes 7**
  With Summer '07, you can synchronize your data between Salesforce and the latest versions of Microsoft Windows and Lotus Notes.
- **Log In on Startup**
  Automatically load Connect for Lotus Notes whenever you start up your PC, eliminating the need to do it manually.
- **Opt-Out Synchronization**
  Enforce your customer's opt-out request by synchronizing opt-out information between Salesforce and Lotus Notes.

Note: This feature is enabled by default but requires administrator activation in the set up area of Salesforce.

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NEW SALESFORCE MOBILE USER INTERFACE *(Unlimited Edition; Available in Professional and Enterprise Editions for an Additional Fee)*

Faster Access to Your Salesforce Data

:: Get to the information you need more quickly
:: Take your Salesforce reports to go
:: Enjoy improved performance and usability for several clients

Getting information on the go is easier than ever before with Summer '07. The latest enhancements to Salesforce Mobile—including user interface improvements—make you more productive on the road. With access to reports and enhanced search capabilities, Salesforce Mobile users have more ways than ever to gain customer insight quickly.

- **New Search Interface**
  With Summer '07, the search user interface has been completely redesigned, making searching for customer information easier and faster than ever before. With the new release, the search box appears on the first screen in Salesforce Mobile, putting the information that users need at their fingertips more quickly. To make it easier to find what users need from among a long list of search results, the results are grouped by information type (e.g., accounts, contacts, opportunities) and include additional relevant information (e.g., name, phone number, and email address for contacts).

- **Reports**
  Get the insight you need when you're at the customer site without having to turn on your laptop with the availability of reports in Salesforce Mobile. Users can show or hide detailed information, making it easier for them to get to the data they need to share. Plus, up to five reports can be stored locally on your device, for quicker access and availability when offline.
- **Windows Mobile Enhancements**
  Salesforce Mobile for Windows Mobile enhancements with Summer '07 include one-click mobilization, products and pricebook support, and custom views.

Note: This feature is enabled by default for Salesforce Mobile users.

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SUCCESSFORCE

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Sharing the Collective Knowledge of the Community

:: Discover innovative ways to solve common business challenges
:: Connect with other members of the salesforce.com community
:: Find resources to help train your team and ensure a successful rollout
:: Influence future product direction by engaging in a dialog about new capabilities

As a salesforce.com customer, you're not in it alone. With over 32,000 organizations using Salesforce, there is a wealth of knowledge in the community that you can tap into. On the Successforce.com site you can take advantage of all our best practices, tips, and networking opportunities. Our top-quality content is contributed by product managers, implementation experts, and customers like you. Visit www.successforce.com today.

- **New Successforce.com Content**
  The Successforce.com site continues to include thousands of pieces of content that salesforce.com is committed to keeping fresh and relevant. We always encourage community participation and greatly value community-driven content. Use powerful search functionality or browse by role to find best practices, post a question to the discussion boards, or browse the IdeaExchange. It's all designed to harness the energy of the world's largest on-demand community and connect like-minded people.
- **The IdeaExchange**
  The IdeaExchange allows you to post feature requests or entirely new product concepts that you'd like to see developed by salesforce.com or one of our partners or developers. Other customers can comment and vote on your ideas, with the most popular ideas rising to the top. Salesforce.com product managers actively monitor the IdeaExchange, offering insight and soliciting feedback on development projects. Over time, the IdeaExchange will expand beyond feature ideas to encompass broader ideas. Visit and participate often to put your personal stamp on Salesforce.
- **Rich Video Content**
  At Dreamforce '06, our annual user and developer conference, we recorded over 100 best practice breakout sessions presented by customers, partners, and product experts. These presentations are available on the Successforce.com site, or you can find them by searching Google Video. These Dreamforce sessions will allow you to connect with the speakers and follow along as they deliver live demos of the application and demonstrate best practices for Salesforce and on-demand CRM.
- **Message Boards**
  The message boards are an excellent way to get all your burning Salesforce questions answered. Take a moment to browse through the latest discussions to get a sense for the types of questions other customers are posting. You'll see that most postings are answered within the same day, and posters often get several different real-world perspectives. Before posting, try searching the message boards—there are thousands of discussion threads, some of which are likely to answer your questions.
- **Blogs**
  Blogs are the best way to keep up with the latest best practice ideas and product developments. Blogs are written by salesforce.com product managers and categorized by product area, so you'll find one for PRM, analytics, search marketing, and so on. We encourage readers to post comments and questions in the blogs so that they become interactive conversations that benefit

everyone. You can also subscribe to a feed for your favorite blog, so that anytime a new post is added it shows up on your Yahoo! or Google personalized page.

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SUCCESSFORCE PROFESSIONAL SERVICES

Strategic Guidance and Hands-on Expertise

:: Increase your time to market with a variety of professional services
:: Get maximum value out of the new Summer '07 features
:: Ensure that your Salesforce implementation will scale to meet your future needs

Nothing is more frustrating than waiting months or years to see a return on a business investment—especially when something is as important to your business as customer relationship management (CRM). With salesforce.com and our professional services team, the wait is over. Based on customer research and thousands of successful Salesforce.com deployments, we have created services for every customer, small, medium or large. These services will help you begin to achieve a return on your investment with our award-winning, on-demand CRM solution.

- **A Variety of Services**
  Salesforce.com offers enterprise expertise including business planning, architecture, data migration, integration, and custom development services to effectively deploy CRM, custom, and AppExchange solutions. Our experts also help small and medium-sized businesses get up and running quickly with our family of QuickStart and Success Coach services.
- **Unique Expertise**
  Customers of Successforce Professional Services benefit from the knowledge of some of the most experienced on-demand experts in the world, with more than 4,000 customer deployments under our belts and a methodology that incorporates best practices from our collective experiences.
- **New Release Optimize for Summer '07** *(Enterprise and Unlimited Editions)*
  Designed specifically for large businesses, the New Release Optimize service provides you with expert guidance so your organization can be successfully using the new Summer '07 features in no time. Our experienced Professional Services team will work with you to understand your business requirements, identify and prioritize a list of new and existing Salesforce features that can have the biggest impact, and educate your team on how to best deploy and use them. With New Release Optimize, you'll enjoy a seamless implementation, greater business productivity, and many other benefits, all with minimal investment on your end.
- **Summer '07 QuickStart Optimize**
  Designed for small and mid-sized businesses, this tailored service ensures a successful experience with all the new features in the Summer '07 release. Summer '07 QuickStart Optimize focuses on leveraging the new features to unlock the potential of your core CRM-related business processes. Our Professional Services team will work with you to understand your business requirements, configure a prioritized set of Summer '07 features, train your team on how best to use them, and set you up to further optimize additional features on your own. You'll enjoy a seamless rollout of new functionality, high adoption of new features, and increased business productivity, all in a short period of time.

For more information about these services and more from the Successforce Professional Services team, please contact us at ps@salesforce.com.

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successforceeducation

SUCCESSFORCE EDUCATION SERVICES

Coming Soon: Summer ’07 Certification

:: Learn all about the new features of Salesforce Summer ’07
:: Validate your skills with two levels of certification on the new release

Successforce Education Services offers several programs to help you learn all about Salesforce Summer ’07, prepare your organization to take advantage of new features, and even certify your new Salesforce skills. You’ll have several opportunities to learn about Summer ’07 at Dreamforce, salesforce.com’s upcoming developer and user conference (September 16-19, 2007 in San Francisco). And if you can’t make it to San Francisco, our virtual New Feature Workshop class will get you up to speed right from your desk.

- **Salesforce Certification**
  The new Salesforce Certification program, available exclusively at Dreamforce, validates your skills as a Salesforce administrator. New and advanced administrators alike can earn certification in one of two tracks:
    - *Summer ’07 Essentials*
    - *Mastering Summer ’07*

  Each track offers courses, skills, and hands-on training to prepare you for the one-hour certification exam—and for implementing all the new features back at the office. Certification exams will be administered on Wednesday, September 19, at 12:30 p.m., 2:00 p.m., and 3:30 p.m., as part of Dreamforce in San Francisco.
- **New Feature Workshop**
  Experienced administrators can learn all about the new features of Summer ’07 in the New Feature Workshop at Dreamforce. You’ll receive comprehensive, hands-on training on the exciting new features in the latest Salesforce release, all in an interactive and collaborative environment. This course is also available in a virtual classroom session—call 1-877-TRAIN-10 (in the U.S.) for details.

Contact salesforce.com’s Successforce Education Services experts for more details and pricing: **1-877-TRAIN-10** (in the United States).

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successforcesupport

SUCCESSFORCE CUSTOMER SUPPORT

Expert Help for Your Development Projects

:: Expand your coding capabilities without adding staff
:: Get new applications to market more rapidly
:: Deploy your customizations more quickly

Successforce Customer Support is dedicated to helping customers succeed on all fronts and get the most value out of their investments in Salesforce technologies. The community of developers, partners, and customers who are building new on-demand applications for salesforce.com’s AppExchange marketplace is growing rapidly. Our **AppExchange Developer Support** service provides expert help for those development projects.

AppExchange Developer Support provides in-depth code analysis and recommendations so you can expand your coding capabilities and expertise without hiring additional developers. Our support representatives are experts in the Salesforce platform technologies, including our Apex Code programming language, and we have assigned resources to support other popular languages such as Java, JavaScript, .NET, and PHP.

Contact your account executive or alliance manager for more information about AppExchange Developer Support services.

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