

salesforce



The Salesforce.com ISV Partner Program Guide

Contents

Introduction	1
Plan	2
The New Model of Cloud Computing.....	2
What is Force.com?	2
<i>Out-of-the-Box Capabilities</i>	3
<i>Limitless Application Opportunities</i>	4
Program Overview	5
<i>Program Qualifications & Criteria</i>	5
<i>Estimated Program & Partnership Costs</i>	5
<i>Enabling Your Success: Salesforce.com's Partner Portal</i>	5
Targeting Customers & User Types	5
Edition Considerations.....	6
Application Types	6
Build	7
Getting Started with Force.com	7
<i>Sign Up for a Developer Edition Account</i>	7
Other Design & Build Considerations	8
<i>Security Considerations</i>	8
<i>Distributing Applications & Protecting Your Intellectual Property</i>	8
Getting Additional Technical Help	9
Go To Market	10
Force.com OEM Embedded License: Market and Sell to New Customers	10
<i>Benefits</i>	11
<i>Getting Started</i>	12
<i>Undergo a Security Review</i>	12
AppExchange: Market and Sell to Salesforce.com Customers	12
<i>Benefits</i>	13
<i>Getting Started</i>	13
<i>Package Your Application</i>	13
<i>Undergo a Security Review</i>	13
<i>Create Your AppExchange Listing</i>	13
<i>Track AppExchange Leads</i>	14
<i>Demonstrate Customer Success</i>	14
Free Trials: Stand-alone Trial Capabilities for Your Apps	14
<i>Benefits</i>	15
<i>Getting Started</i>	15
Marketing and Sales Tools & Resources	15
<i>Demand Generation via Salesforce.com Event Sponsorship</i>	15
<i>Field Programs</i>	16
<i>Benefits</i>	16
<i>Getting Started</i>	16
Conclusion	17
Additional Resources	17

Introduction

Are you an independent software vendor (ISV) looking to build and market cloud applications? To succeed today, ISVs must get their products to market faster than ever. With this increased emphasis on time to market, more and more ISVs are turning to salesforce.com's Force.com cloud platform (Force.com) to build and distribute applications in the cloud.

This guide **is targeted to prospective and existing salesforce.com partners** looking to maximize the many benefits offered to partners in the Salesforce.com ISV Partner Program. This guide will:

- Educate you about the Force.com platform and the Salesforce.com ISV Partner Program
- Outline the important business and technical issues you should consider during the planning and building phases
- Provide access to the tools you need to successfully build your applications
- Introduce our extensive go-to-market and complementary marketing programs

This guide contains a great deal of information. When additional detail is available, this guide includes appropriate hyperlinks and locations of other documents.

Here's a list of terms we reference frequently. Understanding these terms and their associated meanings will help boost the effectiveness of the material in this guide.

Term	Meaning	Referenced As
Force.com	A powerful, scalable, and secure cloud computing platform that lets you develop, package, and deploy applications without infrastructure	Force.com or platform
Salesforce.com ISV Partner Program	The Salesforce.com ISV Partner Program lets you build cloud applications using Force.com technologies and go to market through a variety of distribution and marketing channels as a salesforce.com partner	Salesforce.com ISV Partner Program or Partner Program
AppExchange	Salesforce.com's on-demand marketplace for cloud applications where prospects and customers can browse, find, install, and try apps from partners	AppExchange
Force.com OEM Embedded License	Lets ISVs market, sell, and support applications on a stand-alone basis to new markets by embedding Force.com technologies in one or more applications as part of an integrated and bundled offering	Embedded License
Partner Portal	Provides access to all the resources you need, including acquiring test and demo orgs, participating in the salesforce.com pre-release program, accessing support, and submitting program suggestions via the Ideas tab. Requires authentication.	Partner Portal

Partners developing business applications entirely on Force.com that drive net new business for salesforce.com will be given greater opportunities for success than partners that have built a cloud application on another service/platform.

We urge prospective and existing partners to read this entire program guide to gain a comprehensive understanding of our program as you plan, build, and go to market with salesforce.com.

Plan

The New Model of Cloud Computing

We're in the middle of a multiyear shift away from client/server software technologies managed by in-house IT departments and toward cloud computing technologies centrally managed by providers.

The IT industry's embracing of cloud computing is rapidly becoming mainstream, rather than a just a phenomenon. Enterprises around the world are moving from current on-premises systems to cloud-based solutions because of cost-effectiveness as well as improved speed and ease of deployment.

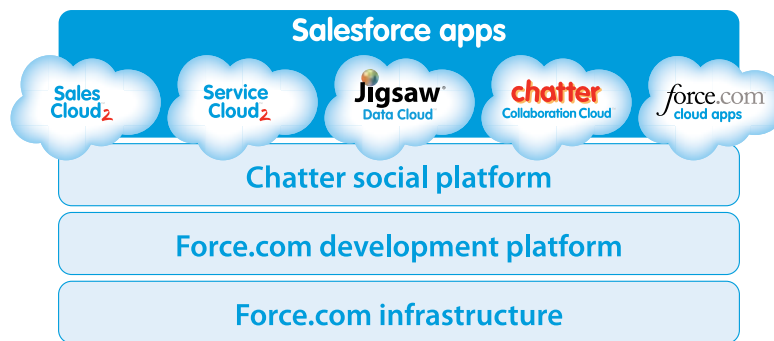
Top industry analysts have noted the growing adoption of cloud computing and forecast this evolution will create a \$44 billion opportunity for custom application development, commercial ISV applications, and infrastructure systems by 2013. In fact, analyst firm IDC predicts that over the next 5 years, the cloud applications market will grow annually by 26%—more than six times the growth rate of traditional IT offerings¹.

What is Force.com?

To capitalize on this opportunity, salesforce.com offers Force.com, the most proven platform for building enterprise applications in the cloud. Force.com currently runs all Salesforce CRM apps; Salesforce Chatter; 1,000+ ISV apps such as those from BMC and CA; and 185,000+ custom apps used by more than 87,200 global customers such as Dell, Japan Post Network, and Symantec.

“We looked at other cloud platforms, but it would have taken us 3 to 5 times longer and we would have spent a whole lot more money.”

Ken McElrath, CEO
Skoodat



Force.com is faster, easier, and has lower risk than other platforms because salesforce.com takes care of the infrastructure, applications, operations, and business services—letting you focus on innovation. And salesforce.com provides easy-to-use, yet powerful development tools and application frameworks to jump-start your development time.

¹ IDC, "New IT Cloud Services Forecast: 2009–2013," <http://blogs.idc.com/ie/?p=543>

You		Powered by salesforce.com				You
Your Innovative Idea	Infrastructure Services	Application Services	Operations Services	Business Services	Your Apps Your Success	
	Network	Security/Sharing	Authentication	Ordering		
	Storage	Integration	Availability	Provisioning		
	Operating System	Customization	Monitoring	Licensing		
	Database	Web Services/API	Patch Management	Billing		
	App Server	Multilanguage	Upgrades	Renewal		
	Web Server	Multicurrency	Backup	Upgrades		
	Data Center	Workflow	NOC	Marketing		
	Disaster Recovery	Analytics		Sales		
		Multi-device				
		Messaging				
	Search					

Out-of-the-Box Capabilities

As cloud computing grows and enterprises embrace this new model of technology delivery, the requirements of various customer segments become more complex. Infrastructure costs and engineering time needed to meet these requirements are becoming more significant as well. Luckily, Force.com offers many out-of-the-box application capabilities that let you quickly address the business requirements of your target markets.

These capabilities include:

- Point-and-click customization
- User security and sharing model
- Ability to deliver any user interface
- Full reporting and analytics
- Powerful workflow engine
- Internationalization – multicurrency/multilanguage
- Robust authentication and security model
- Mobile device support (BlackBerry, iOS, Android)
- Built-in social collaboration
- Web services integration

Equally important, all these capabilities are delivered on the same infrastructure that currently powers up to 400 million transactions per day and complies with the highest security certifications, including SAS 70 Type 2, SysTrust, and ISO 27001. Plus, you and your customers can refer to <http://trust.salesforce.com> for real-time information on system performance, availability, and security for apps that are built and run on Force.com.

One of the most significant benefits of developing and maintaining your application on Force.com is a salesforce.com innovation: multitenancy. Multitenancy lets you and other partners deliver all the benefits of new releases to customers without the pain of managing upgrades and supporting multiple code lines. That approach eliminates versioning headaches and ensures you can invest in enhancing your solutions instead of spending resources maintaining old code lines.

For more information about Force.com's metadata-driven software architecture and how it enables multitenant applications, see our [Multitenancy whitepaper](#). This technical paper explains the patented technology that makes Force.com fast, scalable, and secure for any type of application.

Limitless Application Opportunities

Force.com gives ISVs the ability to build and integrate a broad range of application types to address a variety of requirements or niche vertical markets. A quick look at the categories on the [AppExchange](#) gives you an idea of the types of applications currently available and possible opportunities. To understand which applications salesforce.com prospects and customers are most frequently installing and deploying within their organizations, check the Most Popular tab on the AppExchange home page.

The most successful partners have focused their development efforts on areas in which they possess subject matter expertise. These typically fall into three broad categories:

- **Existing application categories** – HR, accounting, finance, inventory management, ERP, asset management, compliance, and risk management
- **Departmental applications & utilities** – IT bug tracking, vacation request management, volunteer management, and collaboration tools
- **New application categories**

Salesforce.com provides a way for our customer and partner community to collaborate on potential product ideas and feature requests via a site called the [IdeaExchange](#). You can use the [IdeaExchange](#) to find potential product ideas and test new product concepts to help focus your development and marketing efforts. You can also submit an idea that describes the business challenge your application seeks to address and see how the salesforce.com community responds by tracking their votes and feedback.

In December 2008, we asked an independent third-party research firm to survey more than 3,000 salesforce.com customers randomly selected across the world, representing more than 20 industries. When asked to name the applications that would be of the most interest in the next 12–18 months, respondents identified the following application categories (in order of priority):

Top 10 CRM and Non-CRM Apps of Interest to Salesforce.com Customers in the Next 12–18 Months

CRM Apps	Non-CRM Apps
Email campaign execution (high volume)	Invoices
Proposals	Advanced workflow
Event management & registration	Expenses
Quotes	Projects
Contract management	Electronic signatures & workflow
Customer satisfaction surveys	Time & attendance tracking
Sales performance management / advanced sales analytics	Finance & accounting
Website tracking & analytics	Payment processing
Compensation management	Instant messaging/employee chat
Data cleansing, data quality services	Collections

Source: Salesforce.com Relationship Survey conducted Dec. 2008, by an independent supplier, MarketTools Inc. Sample size for CRM apps equals 22,623 responses and non-CRM apps equals 10,661 responses.

Gaining access to top-tier, third-party analyst research (Gartner, IDC) can also provide valuable insight into forecasted technology spending by market segment and geography. Analyst organizations frequently publish research on IT spending priorities and the priorities of the business organizations IT serves by industry.

Program Overview

To help you take advantage of building applications in the cloud, it's essential to understand the features and benefits of the Salesforce.com ISV Partner Program. And because our program offers multiple levels of partnership and associated benefits, it's important to understand how working through those program levels will help contribute to the growth and success of your business.

The Salesforce.com ISV Partner Program lets you build cloud applications using Force.com technologies and then go to market through a variety of distribution and marketing channels. As a member of our program, you're given immediate access to our platform and hundreds of out-of-the-box components to start developing your applications. You also have access to special programs, tools, services, marketing programs, and supported selling options.

Program Qualifications & Criteria

Any company that intends to build applications using Force.com technologies and market them to existing salesforce.com customers or new customers can join the Salesforce.com ISV Partner Program.

Estimated Program & Partnership Costs

Although the Salesforce.com ISV Partner Program is free, interested partners should plan to make investments in the following areas as they would in any business:

- **Application development** – Project managers, programmers, QA, training
- **Marketing** – Events, e-marketing, website, PR, lead generation
- **Security review fees** – Salesforce.com charges a periodic security review fee to make sure that every fee or subscription-based application based on the Force.com platform, whether marketed on the AppExchange or via our OEM channel, complies with our rigorous security standards. The initial security review costs only \$300, and subsequent reviews are just \$150. Please note that there is no listing fee for applications that are offered for free on the AppExchange. However, this offer doesn't apply to free downloads of client applications, free trials, or pay-per-use applications.

For more information on the Salesforce.com ISV Partner Program, please visit www.salesforce.com/partners.

To learn more about how other ISVs have built cloud applications and businesses on Force.com, see our [Partner Success Stories](#).

Enabling Your Success: Salesforce.com's Partner Portal

Regardless of where you may be in the partner lifecycle, one of the biggest benefits salesforce.com offers all our Salesforce.com ISV partners is access to the Partner Portal to facilitate your success. The Partner Portal gives you easy access to all the resources you need: acquiring test and demo orgs, participating in the salesforce.com pre-release program, accessing tools and support, and submitting program suggestions via the Ideas tab.

Once you're enrolled and have accepted our initial partner agreement, you'll automatically receive a login and password to access the Partner Portal. We encourage you to familiarize yourself with the Partner Portal and to take advantage of the many resources that are referenced in the remainder of this document.

Targeting Customers & User Types

One of the first decisions you'll need to make is which customer segment to target with your applications. Is the application meant for existing Salesforce CRM customers or will it address other business needs or processes beyond CRM?

Applications that target existing CRM users tend to be add-ons and complementary utilities that extend core Salesforce CRM functionality into areas such as sales force automation, customer service and support, or channel management. In these cases, ISV applications run on top of a customer's existing CRM user license. If a customer has already purchased a Salesforce CRM subscription, your application is sold as a stand-alone app, but used with Salesforce CRM.

If you plan to target broad user populations or departments that don't use Salesforce CRM, these customers tend to be Force.com users. That means you'll need to account for the cost of the Force.com user license required to run the application. If you plan to build your app using Force.com technologies and market it to users that aren't already Force.com customers, salesforce.com offers you special pricing for embedded licenses to enable distribution to net-new customers.

As a Salesforce.com ISV Partner, it's important to understand the various edition limits that may impact your ability to sell into the Salesforce CRM install base. Each customer's capacity to run partner and/or custom applications is dictated by its Salesforce CRM or Force.com Edition license. **However, customers that purchase a partner solution built natively on Force.com are not subject to the tab, objects, and apps limits set forth by their Salesforce CRM edition for that specific partner solution.**

Edition Considerations

Along with understanding how editions impact your ability to sell into and outside of salesforce.com's customer community, you need to know what role editions play in how you design and develop your application. If you plan on using advanced CRM capabilities in your application, for example, only customers with Salesforce CRM Enterprise Edition or Unlimited Edition will be eligible to purchase your solution, unless they choose to upgrade. If you plan on developing a solution for Salesforce CRM Group Edition or Professional Edition, we recommend that you request a Group Edition or Professional Edition Test Org to conduct comprehensive testing.

If you build your solution on Force.com Free Edition, you won't have access to CRM objects such as cases, solutions, campaigns, leads, opportunities, products, and forecasts, which aren't included. Detailed term sheets that define the Force.com Embedded License (compared to what is available in Salesforce CRM) will be shared with ISVs after enrollment in the Partner Program.

For more information, please refer to:

Salesforce CRM – Edition Comparison:

<http://www.salesforce.com/crm/editions-pricing.jsp>

Force.com platform – Edition Comparison:

<http://www.salesforce.com/platform/platform-edition/>

Note: Although salesforce.com doesn't publicly release edition breakdowns across its customer base, larger customers generally tend to use the more advanced editions and features in Salesforce CRM Enterprise Edition and Salesforce CRM Unlimited Edition, for example.

Application Types

In your product planning, you'll also want to consider the type of application(s) you plan to develop. Force.com was designed specifically for data-centric business applications and offers many benefits, such as multitenancy and the prebuilt components discussed above. However, the nature and complexity of your application may require you to deliver your application leveraging complementary services.

Use Case Scenario

- **ISV A** develops and sells a configuration and pricing application for use with Salesforce CRM
- **ISV B** develops and sells a human resources application
- **ISV A** sells 20 seats of its configuration and pricing application to an existing Salesforce CRM user with 20 CRM seats = ISV A sells its solution as a stand-alone application; **no additional CRM licenses are needed.**
- **ISV B** sells its human resources solution to an existing Salesforce CRM customer with 20 CRM seats, but the customer wants all 100 of its employees to use and access the HR app. In this case, ISV B would license its HR application to the 20 CRM users as **a stand-alone application and** then license its solution to the remaining 80 employees **with an underlying Force.com license.**

Type of Application	Definition
Force.com Native	<ul style="list-style-type: none"> • Primary data, logic, and user interface reside on Force.com • May callout to approved third-party Web services such as Amazon.com, Facebook, or Google • Scales to thousands of users
Composite	<ul style="list-style-type: none"> • Primary data and logic run on something other than Force.com • Application is an <i>integration</i> between Salesforce apps and another application
Client	<ul style="list-style-type: none"> • Desktop or mobile app • Back-office integration • Web services API • Doesn't use partner-hosted servers

In addition to the aforementioned product planning considerations, you should account for other considerations early in the product planning lifecycle. For more information, see our [“Introduction to Developing Commercial Apps on Force.com.”](#)

Build

Once your product planning is underway and you have a good understanding of how you'll be able to take advantage of the benefits associated with the Salesforce.com ISV Partner Program to grow and expand your business, the fun begins—building your application.

Getting Started with Force.com

In joining the Salesforce.com ISV Partner Program, you'll automatically become part of the Force.com developer community. The Force.com platform lets you build powerful cloud apps quickly using free tools and out-of-the-box capabilities, and then extend them with advanced technologies.

Exclusive Force.com ISV technical programs and benefits include:

- Free Force.com Developer Edition account & tools
- Monthly developer newsletters
- Free educational tutorials & documentation on <http://developer.force.com>
- Access to ISV enablement services from Force.com experts & world-class partners
- Frequent technical events & training opportunities
- Eligibility for partner-only technology previews & enhanced tools
- Active technical discussion board community
- Access to technical support & developer certification paths

For more information, see <http://developer.force.com>.

Here are some steps you'll want to follow as you begin to build your application:

Sign Up for a Developer Edition Account

If you haven't already done so, obtain a Partner Developer Edition (DE) account in the [Partner Portal](#) by referring to the Other Resources, Create Test, or Demo Org link. By signing up, you'll receive a free, full-featured Developer Edition account to serve as your master development environment. You can use this environment to develop your Force.com platform apps. Click [Developer Edition](#) to obtain an individual account.

With a Developer Edition account, you can try out or even extend the included Salesforce CRM applications; integrate with other applications; and develop new tools and applications.

In addition to providing access to many of the exclusive features available with Salesforce CRM Enterprise Edition, with the most current release, a Partner Developer Edition account also includes the following:

Partner Developer Edition	
Purpose	Master Development Org Repository Robust Testing
Price	Free
CRM License	20
Force.com Platform Licenses (Force.com Edition)	20
ISV Portal Licenses	20
ISV Portal with Sharing Licenses	20
Salesforce CRM Mobile Licenses	20
Storage	250MB
API Call Limit	10,000/24-hour period

“The relationship salesforce.com has with its partners is special—it really values how the expertise of smaller companies can add depth to its ecosystem.”

Amanda Roberts, CEO
Stone Cobra

Developer Edition organizations (orgs) continue to be available to you as long as these orgs have some type of activity within the previous 6 months.

For more information on how to sign up for a Partner Developer Edition org or to better understand what's available within that org, see [Partner Development and Test Environments](#).

Other Design & Build Considerations

Now that you're set with a Developer Edition org and your learning is underway, you'll want to take other factors into account as you develop commercial applications: data security, application distribution, and intellectual property protection.

Security Considerations

The success of cloud computing is dependent on earning and maintaining customer trust. Nothing is more important to salesforce.com than the privacy of its customer data, and we have the same expectations for our partners. If you plan to build applications on the Force.com platform, please use the free [Secure Cloud Development resources](#). Keep in mind that if you plan to build applications using a Force.com Embedded License or plan to go to market on the AppExchange, your applications must go through a Security Review as outlined in the “Estimated Program & Partnership Costs” section of this guide. For additional information, see [Security Review](#).

Distributing Applications & Protecting Your Intellectual Property

You'll also need to consider how to distribute your application. As part of building on Force.com, ISVs use packaging and licensing management tools to control the distribution of their commercial applications.

Packages give you a powerful way to distribute commercial applications via the AppExchange marketplace. Packages are like suitcases that can contain your components, code, or apps. You can use a package to bundle something as small as an individual component or as large as a set of related apps.

Packages come in two forms: managed and unmanaged. Unmanaged packages can be used for one-time distribution to one or more customers, like a template. Managed packages are ideal when you're building a commercial-grade application you plan to upgrade over time. You can continue to upgrade managed packages after they've been deployed into customer instances. Releasing a managed package prevents developers and installers from making harmful changes to the app. Most partners choose to build applications using managed packages. **It is critical to your success that you learn about this distribution method prior to building your application.**

Here's a high-level illustration of the differences between packaging types:

	Managed Package	Unmanaged Package	No Package
Definition	<ul style="list-style-type: none"> • Supports seamless upgrading • Certain components are locked while others are editable • Provides support for license enforcement features • Offers source code protection • Prevents others from making destructive or harmful changes • Ability to offer beta versions to a small sampling of users to allow for feedback 	<ul style="list-style-type: none"> • All components are editable by the developer and the installer • Not upgradeable 	<ul style="list-style-type: none"> • Applicable to client applications or integration tools
When to Use	<ul style="list-style-type: none"> • 1:many distribution • Commercial intent • Foresee upgrades 	<ul style="list-style-type: none"> • 1:1 distribution • Extensive modification required 	
Editions Supported	<ul style="list-style-type: none"> • Only Developer Edition users can create managed packages 	<ul style="list-style-type: none"> • Unmanaged packages can be created in any Salesforce CRM edition 	
Type of Application(s)	<ul style="list-style-type: none"> • Native or composite 	<ul style="list-style-type: none"> • Native or composite 	<ul style="list-style-type: none"> • Client or mobile app

For more information, see <http://wiki.apexdevnet.com/index.php/Packaging>.

Deciding how you'll package your solution will impact your license management options. If you'd like to use salesforce.com's License Management App (LMA), you're required to create a managed package. The LMA helps you view, grant, and revoke licenses and manage the trial experience on your registered AppExchange apps. Salesforce.com provides access to the LMA free of charge via the AppExchange.

Each time a customer or prospect installs your managed package, a lead record and a license record are created in the LMA. By specifying defaults for these license records, you can apply licensing to control how many users in the customer organization can access your package and for how long. Using the LMA, you can track how many customers have installed a package and which version of the package they currently use. You can also use the LMA to manage the leads associated with the licenses. And you can manage your active customers and users and increase or decrease the number of licenses they have based on new deals, renewals, or cancellations.

For more information, see [Licensing Managed Packages and LMA 2.0](#).

Getting Additional Technical Help

Upon joining the Salesforce.com ISV Partner Program, your technical teams will have access to additional free tools that can be self-provisioned through salesforce.com's [Partner Portal](#) and through your membership in the developer community at <http://developer.force.com>. You'll be able to join the interaction and post questions on the [Developer Boards](#). These boards are leveraged by other members of the community and monitored by salesforce.com employees.

All partners are also able to log technical support tickets via the salesforce.com [Partner Portal](#).

In addition to the free tutorials and support resources on developer.force.com and the [Partner Portal](#), salesforce.com also offers a wide variety of education services and formal certification paths to help your developers become Force.com experts. For more information, see [Training](#).

To find Force.com developers to help build your applications, visit the Jobs section of the Force.com discussion boards to post requests to the entire Force.com developer community. For more information, see [Job Boards](#).

Go To Market

Now that you understand what to consider when planning and building your solution on the Force.com platform, how do you take that solution to market to ensure your long-term success and profitability?

Salesforce.com offers several proven and flexible go-to-market programs that give you access to 2 million salesforce.com subscribers and beyond. You can also accelerate demand for your solutions by taking advantage of complementary marketing programs to maximize your success.

The investment you make in the planning phase—defining your target market, targeted editions—will help define your distribution strategy. As a Salesforce.com ISV partner, salesforce.com offers you several comprehensive distribution channels:

- **Force.com Embedded License (OEM)** – As an ISV, you market, demonstrate, sell, and support your applications on a stand-alone basis to new markets and non-salesforce.com customers. How? By embedding Force.com technologies in one or more of your applications as part of an integrated and bundled offering.
- **AppExchange** – Salesforce.com ISV partners can use the largest cloud apps marketplace in the world to list, market, and sell their applications to salesforce.com prospects and customers. Depending upon the size and nature of your business, the AppExchange can complement your existing sales and marketing capabilities.
- **Free Trials** – And whether you're an ISV partner building your solution using the Embedded License or listing it on the AppExchange, you can also offer stand-alone trial capabilities for your apps directly from your website or your AppExchange listing.

Force.com OEM Embedded License: Market and Sell to New Customers

As a Salesforce.com ISV partner, you embed the Force.com platform in your applications. Via the OEM Embedded License option, you can market and sell your Force.com-powered applications to accounts that may not be existing salesforce.com users/customers. This option lets you sell your applications and the Force.com platform independently as well as set the price and contract terms for end-user customers. It works well for partners interested in selling outside the salesforce.com customer base with products mostly unrelated to CRM.

The Embedded License is a good choice for ISV partners looking to build on the collaborative functionality of our platform, but it does not offer any CRM functionality.

“No other platform comes close to Force.com in terms of capabilities, the partner ecosystem, and the support we get from salesforce.com.”

Dave Yarnold, CEO
ServiceMax

	Built-in Capabilities	Extras
Cloud Infrastructure		
Secure & reliable infrastructure	>99% reliability ISO 27001 certified	
Real-time upgrades	✓	
Relational database	✓	
Sharing framework	✓	
API enabled	1,000 calls/user/day 1,000,000 total	\$ - Available in 10K increments
File storage	1GB/user license	\$ - Available in 1GB/10GB increments
Data storage	500MB	\$ - Available in 500MB increments
Sandbox	10MB (developer)	\$ - Full copy/configuration
Development Platform		
CRM objects ¹	Not included	Not included
Apps	1 app	\$
Accounts & contacts	✓	
Chatter	✓	
Connect for Office	✓	
Connect for offline	✓	
Content	✓	
Documents	✓	
Force.com code (Apex)	✓	
Force.com IDE	✓	
Force.com pages (Visualforce)	✓	
Mobile Lite	✓	
Multicurrency/multilanguage	✓	
Page layout editor	✓	
Reporting & dashboards	✓	
Search	✓	
Tasks & events	✓	
Workflow/approvals	✓	
Custom tabs	100/org	\$
Custom objects	200/org	\$
Custom fields	500/object (max)	
Force.com sites ²	500,000 sites page views/month	\$ - Available in 1 million sites page views/month increments
Additional Products		
Mobile	\$	
Salesforce CRM's ideas	\$	
ISV portal	\$	
ISV portal with sharing	\$	
Partner Premier Support	\$	

\$ Available for an additional fee. See service order for pricing.

¹ CRM objects defined as cases, solutions, campaigns, leads, opportunities, products, contracts, forecasts, and price books.

² Sites page view: Defined as a request from a non-authenticated site user to load a page associated with one of the sites within your Force.com domain or custom domain. Requests from authenticated portal users are not counted as page views.

An Embedded License costs participating ISV partners \$15/user/month. Depending on your pricing needs, a revenue share model is also available.

Benefits

The benefits of going to market as an Embedded Partner include:

- **Lower costs & risk** – Build on a proven cloud-computing platform without worrying about scalability, security, and trust. Salesforce.com takes care of those things for you.
- **Broader reach & opportunities** – Capitalize on your industry expertise to build and sell apps to any company, not just salesforce.com's install base.
- **Faster time to market** – Take advantage of both the technology and the program.

- **Next-generation enterprise capabilities** – Build apps with the collaborative, mobile, and social features users want. With Force.com, you benefit from continual platform improvements like Chatter, delivered automatically—for free.

Getting Started

Once you've completed the [Partner Ecosystem Registration Form](#), a Force.com ISV account executive will be in touch with you to discuss next steps, including your business plan (target markets for your application, marketing plan, sales capacity, financial sustainability, and so on). The representative will also share the Embedded Partner Term Sheet with you. It outlines pricing, support requirements, invoicing and payment terms, and other important facets of the program.

Once you're accepted into the program, you'll need to sign the legal agreement outlining the terms of the relationship.

Shortly thereafter, you'll also receive the Force.com Embedded License Getting Started Kit, which outlines all the steps necessary to ensure your success, such as establishing your credit profile with salesforce.com and understanding how to place an order once you've booked your first transaction. This document also addresses frequently asked questions (FAQs) on billing and other topics.

Undergo a Security Review

All OEM applications must go through a security review to assess the security and risk posture of partner organizations. This review also ensures that all applications built on the Force.com platform adhere to industry best practices for security:

- Ensures customers trust third-party applications to work securely with their Salesforce applications and the Force.com platform
- Helps partners deliver apps that span multiple systems and meet the needs of salesforce.com customers and beyond
- Provides a secure ecosystem that facilitates open relationships between salesforce.com customers, non-salesforce.com customers, third-party developers, and application providers

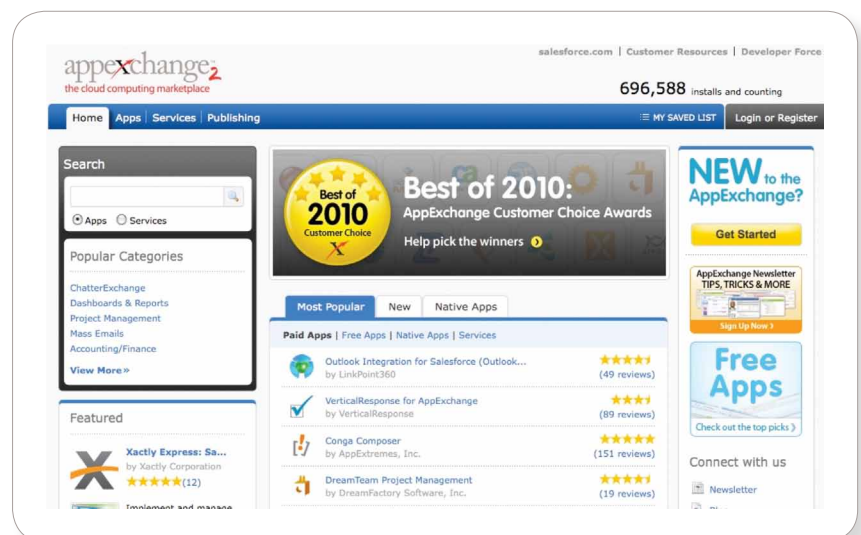
The scope and nature of the security review depends on the type of application. For more information and tools to assist you with this process, see [Security Review](#).

AppExchange: Market and Sell to Salesforce.com Customers

The AppExchange makes it easy to showcase your applications to salesforce.com prospects and customers.

The AppExchange is the world's first on-demand marketplace for enterprise cloud computing applications. Countless AppExchange partners from small development shops to global ISVs have found the site to be a viable and profitable channel for their integrated solutions. There are currently more than 1,000 apps on the AppExchange to either extend and customize CRM or expand the benefits of running a business in the cloud to new departments such as Finance, HR, IT, and Professional Services.

Salesforce.com prospects and customers from all industries visit



the AppExchange regularly to access, try, and deploy critical business applications—in just a few clicks. They rely on the AppExchange for everything from simple survey tools to collect employee information to comprehensive financial management applications that automate global accounting processes.

You can market your application under one or more categories on the AppExchange and let prospects or customers find your application more easily using our robust search capabilities. Categories include Analytics, Components, Finance and Administration, Integration, and Data Management as well as a number of vertical-specific categories. Because we continue to add categories as solutions are added to the AppExchange, visit the [AppExchange](#) for a comprehensive list.

Benefits

By going to market on the AppExchange, you will:

- Automatically gain access to the more than 2 million-member salesforce.com user community
- Promote your solutions to salesforce.com prospects, which comprises about 20 percent of site traffic
- Generate free leads from your listing that are routed directly to you for follow up

Getting Started

To take advantage of the AppExchange as a go-to-market vehicle, you'll need to package your application, undergo a security review, and create your AppExchange listing. Following these steps will ensure you complete the process correctly. We've included a brief description of each step below. You can find detailed descriptions via the links specified in the following sections.

Package Your Application

As discussed in the Planning section of this guide, packages provide a powerful way to distribute your applications via the AppExchange. Packages are like suitcases that can contain your components, code, or apps. You can use a package to bundle something as small as an individual component or as large as a set of related apps.

Packages come in two forms: unmanaged and managed. Use *unmanaged* packages for one-time distribution (to one or more clients), like a template. Use *managed* packages when building an app you plan to upgrade because you can continue to upgrade managed packages after they've been deployed. Packages are only necessary if your application is delivered via a package; if your application is a client application, you don't need a package. Most ISVs use managed packages to distribute their applications because having a managed package is a prerequisite to being able to use the License Management Application (LMA).

For more information, see [How to Create and Register a Package](#) or see the “Planning the Release of Managed Packages” section in Salesforce CRM Help.

Undergo a Security Review

All applications published on the AppExchange must also go through a security review just like applications built using the OEM embedded license. The scope and nature of the security review depends once again on the type of application. For more information and tools to assist you with this process, see [Security Review](#).

Once your application passes the security review, AppExchange applications are also entitled to some additional benefits:

- **Client ID/API Token** – This token lets composite and client apps make API calls into Professional Edition orgs.
- **Apex Authorization** – This permission will let the Force.com (Apex) code included in your managed package run in Group and Professional Editions (does not apply to packages containing Apex Web services).

Create Your AppExchange Listing

Another important consideration is how to market your listing to ensure prospects and customers have the information they need to try and buy your solution. Remember—it's all about first impressions. Whether the

AppExchange is your only channel or a complement to your existing direct and indirect sales channels, your listing communicates that you're open for business.

Before building your listing, look through the tips, tricks, and best practices on the [Partner Portal](#). These cover topics such as how to differentiate your listing, build a great demo, and design a trial experience. This is a critical step because you'll need to think seriously about the type of trial and installation experience you provide to prospects (Test Drive and/or Get It Now) and then build that experience accordingly.

For more information, see our [Publishing on the AppExchange](#) resources.

Track AppExchange Leads

Creating a comprehensive listing will help draw traffic to your site and retain your visitors' attention. Depending on your sales and marketing plans, you may wish to use your AppExchange listing as a potential landing page for marketing campaigns. Such a page lets a visitor click on the Test Drive and Get It Now buttons while you capture the lead via the AppExchange Leads program. Site visitors populate a short form that lets you instantly view, track, and follow up with prospects. Leads are routed directly from your listing on the AppExchange free of charge to the Salesforce CRM org you've specified during the listing process. Within your org, you can set up workflow and rule assignments to ensure your sales team converts these leads into closed deals quickly.

For more information, see [AppExchange Leads Program FAQ](#).

Over the years, we've seen partners leverage best practices to ensure they convert leads generated from the AppExchange into sales. We've also provided suggestions on how to best report and track those leads within your Salesforce CRM org. For more information, see the [Partner Portal](#).

Demonstrate Customer Success

Showcasing your customer success is one of the best ways to differentiate your company as an ISV on the AppExchange. And customer success will also contribute to your tier ranking.

Your customers can post reviews of your solution(s) on the AppExchange. This is a powerful way to get the word out about the success customers have had using your applications and build your credibility. Our customers frequently tell us that customer reviews play a critical role in whether they move forward with a trial of the partner app.

Customer reviews can also serve as an easy way to gather market requirements for future versions of your solution(s). In their reviews, customers may communicate desired functionality or suggest improvements, which can be gathered, prioritized, and incorporated in your product roadmap.

Free Trials: Stand-alone Trial Capabilities for Your Apps

ISVs can also offer a free trial of their cloud application directly from their websites or AppExchange listing. This program lets you focus on marketing your applications the way you want and providing a seamless trial experience to interested prospects—all while maintaining control of your brand and user experience. Using free trials as a marketing vehicle is ideal for those partners looking to extend their reach inside and outside traditional salesforce.com prospects and customers.

With free trials, you create an org template with your application that is then used to create 30- to 90-day trials for interested prospects. You can provide prospects with either a fully functioning trial version of your app or limit the functionality, if you prefer. To provide a great user experience, you might consider adding functionality to your trial, such as a customer feedback submission form that enables direct feedback from within your trial application.

Leads created when a prospect signs up for a trial are then routed to you for follow up and tracked via the License Management Application (LMA) if your application is distributed via a managed package.

Benefits

As a user of free trials, you'll be able to:

- Maximize the distribution of your applications
- Maximize customer reach and adoption by running marketing campaigns from your website and/or your AppExchange listing
- Establish the financial relationship between you and your customers to maximize your return on investment (ROI)

Getting Started

To learn more about free trials and the steps you'll need to take to start leveraging it, see [How to Create a Free Trial](#).

Marketing and Sales Tools & Resources

Salesforce.com offers a host of marketing programs, resources, and events to help drive awareness of your solutions within our prospect and customer base as well as our internal sales organization.

You can find a complete list of all these programs and associated tools and resources—including playbooks, best practice guides, and descriptions of sponsorship opportunities—on the [Partner Portal](#).

Here's a sampling of the programs and events salesforce.com offers:

- **Partner Highlight: AppExchange Category Newsletter** – With a distribution of nearly 10,000 subscribers, these monthly, category-based newsletters let featured partners share customer success stories, whitepapers, and other content.

- **Sponsorship Opportunities on the AppExchange** – Sponsorship opportunities on the AppExchange provide visibility and accelerated traction that result in more leads. Data shows that increased visibility of your application “at a glance” is a proven

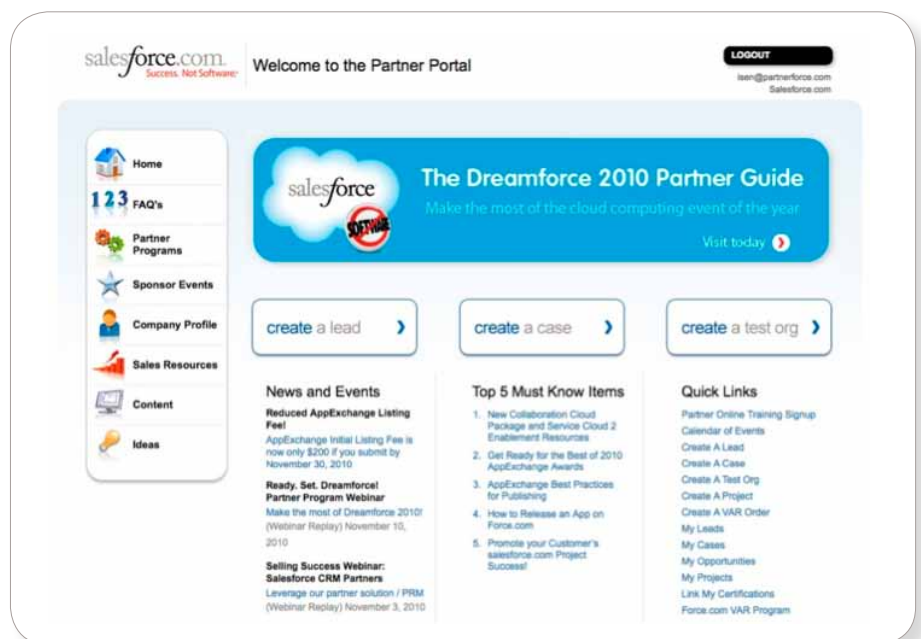
competitive advantage in product recognition and drives interest with users visiting the AppExchange.

There are two distinct sponsorship opportunities: Sponsored Ads or Sponsored Search Results.

Available only to Premier Partners, Sponsored Ads features your listing in prime real-estate on the homepage. Sponsored Search Results are available to all partners and provides the opportunity for your listing to appear with contextually relevant search results. To learn more about these opportunities, see [Sponsorship Opportunities on the Partner Portal](#).

Demand Generation via Salesforce.com Event Sponsorship

- **Cloudforce Tour** – We've combined the success and power of Tour de Force events with Success Tours to create an enhanced Cloudforce Tour event. Held approximately four times per quarter, these events generate standing-room-only crowds, bringing in hundreds of customers, prospects, and developers from around



the world. Sponsoring one or more cities on the tour provides a great demand-generation opportunity for partners to engage with our customers and corporate/field sales teams.

- **Dreamforce** – The largest cloud computing event of the year, Dreamforce is a 3-day user and developer conference that lets our partners and sponsors engage with the salesforce.com community. As a Dreamforce sponsor, you can raise the profile of your solution to a targeted audience of 25,000 people while also driving demand and awareness for your solutions. Historically, feedback from the partner community about the quality and number of leads has been exceptional. A variety of sponsorship levels is available to help partners achieve marketing and brand success at every level of investment.

Field Programs

- **Customer Support Manager (CSM) Lunch and Learns** – Salesforce.com's Customer Success Managers (CSMs) are responsible for driving customer adoption and success. Recommending partner solutions is a key part of the CSM's daily role of helping customers find the right on-demand tools to solve their business problems.

Through this program, partners teach CSMs how their solutions address specific customer business challenges. The program lets partners establish contacts and build relationships within salesforce.com while providing CSMs with the tools, demos, and information they need to effectively position your solutions.

Participation in this program is by invitation only.

- **Sales Engineer (SE) Workshops** – Salesforce.com's Sales Engineers (SEs) are responsible for showcasing salesforce.com's application functionality in a presales capacity. Partner solutions and demos are a key part of the SE's role of helping customers understand how to integrate partner solutions. This knowledge is particularly important when a prospect or customer needs complementary functionality or solutions to fully address specific business challenges.

The SE program lets partners teach SEs how their solution(s) integrate with and add value to Salesforce CRM plus how they address customer business issues. During these sessions, partners are encouraged to provide tools, demos, and information to help SEs keep their solutions top of mind. **Participation in this program is by invitation only.**

To learn more about these programs and their cost, please contact partnersuccess@salesforce.com or refer to the ISV tab in the [Partner Portal](#), Sales and Marketing Content.

Benefits

By taking advantage of these programs and events, you will:

- Build market and solution awareness through direct access to salesforce.com prospects and customers
- Generate leads for immediate follow up
- Build relationships with salesforce.com field personnel, executives, and other key stakeholders

Getting Started

You can always learn more about the latest marketing events and programs or get access to the latest playbooks and best practices in the ISV tab under Sales and Marketing in the [Partner Portal](#).

If you're interested in sponsoring an upcoming event or determining your eligibility for these activities, please send an email to partnersuccess@salesforce.com and our Partner Marketing Team will contact you.

Conclusion

Salesforce.com offers ISV partners a clear path to success and profitability—whether you're looking to build and sell a CRM-related add-on, develop and market a unique application for a niche market, or market an existing cloud solution on the AppExchange.

It's easy to get started:

- Join the program, get access to the [Partner Portal](#), and explore the wealth of information available to accelerate your traction.
- Use your free Developer Edition account to start building your apps using the extensive resources available to you on <http://developer.force.com>, including free educational tutorials and documentation plus access to technical support and community discussion boards.
- Tap into a global distribution channel of more than 2 million salesforce.com customers via the [AppExchange](#) marketplace, enroll in the Embedded Partner Program, and start taking advantage of marketing and joint selling programs and events.

For more information, see www.salesforce.com/partners or contact your Account Executive.

We look forward to welcoming you to the salesforce.com partner community and our mutual success.

Additional Resources

Throughout this guide, we have provided you with key terms and resources, and their associated links on how to obtain more information. For your convenience, they have been reproduced in the following table.

Term	Link for more information
AppExchange	http://www.appexchange.com/
Developer Boards	http://community.salesforce.com/sforce/?category.id=developers
Developer Edition	http://wiki.apexdevnet.com/events/regular/registration.php?d=70130000009Ur7
Developer Force	http://developer.force.com
Embedded License	http://www.salesforce.com/assets/pdf/datasheets/DS_Forcedotcom-OEM.pdf
Free Trials	http://wiki.developerforce.com/index.php/How_to_Create_a_Trial_on_AppExchange
Idea Exchange	http://ideas.salesforce.com/popular/appexchange_app_suggestions
Multitenancy	http://www.apexdevnet.com/media/ForcedotcomBookLibrary/Force.com_Multitenancy_WP_101508.pdf
Packaging	http://wiki.apexdevnet.com/index.php/Packaging
Partner Ecosystem Registration Form	http://sites.force.com/partners/PP2PartnerRequestPage?p=P_Registration
Partner Portal	http://www.salesforce.com/partners
Partner Success Stories	http://sites.force.com/partners/PP2Page?p=P_SuccessStories
Security Review	http://wiki.apexdevnet.com/index.php/Security_Review



For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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