Spring Into the Cloud: Spring '09 Release

= Salesforce.com Community most requested features

Join the Cloud Crowd

With Spring '09, it's easier than ever to build your dream apps. You'll love how easy it is to create the perfect UI with our new Enhanced Drag-and-Drop Page Layout Editor. And developers using the IDE can code faster then ever with the Apex Code Auto-Complete feature.

force.com Dream. Build. Succeed.

User Interface

Enhanced Page Layout Editor
Sites Audit Trail
Sites Packaging
Sites Partner Portal Support
Sites Robot.txt and Favicon Support
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Global, Trusted, Secure Infrastructure

API Data Replication Enhancements
Access to Email Logs in the Application

Application Exchange

Enhanced Search
Multiple Package Relationships

Salesforce CRM Gets Smarter

Spring '09 introduces intelligent ways for you to close more business. Magically connect with the top reps in your company who are closing deals, collaborate with your colleagues to build the perfect pitch using Salesforce CRM Content, and wow your prospects with amazing online presentations.

salesforcecrm Manage. Share. Succeed.

Salesforce CRM Sales

Opportunity Genius
Time Picker for Events
Dashboard Finder

Salesforce CRM Marketing

Campaign Member Enhancements

Salesforce CRM Customer Service & Support

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Sharing with Multiple Partners
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Share Products with Partners
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Salesforce CRM Content

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Suggested Duplicates

Salesforce CRM Mobile

Dashboards for iPhone
Visualforce Mobile and Web Tabs for iPhone
Log-a-Call Pop-Up for iPhone
Contact Roles for Windows Mobile
Related Records Search for Windows Mobile
One-Click Installation for BlackBerry
Device Assignment Security Control

User Interface

ENHANCED PAGE LAYOUT EDITOR *(All Editions)*
Create Page Layouts with a Drag-and-Drop Interface

- :: New rich look-and-feel for the page layout editor
- :: Intuitive, flexible, and easy to use

Use the WYSIWYG page layout editor to improve productivity and build application user interfaces with ease. Administrators can quickly customize page layouts with an improved drag-and-drop design, Quick Find, Undo/Redo, and the ability to modify a mini-layout, clone a layout, or switch to another layout directly from the editor. Spring '09 also includes new functionality for Blank Spaces and Edit-in-Place.

Note: Automatically visible to all users. No setup required.

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SITES AUDIT TRAIL *(Developer Edition)*
Track Changes to Your Force.com Sites

- :: Improve your Web site governance process

Force.com Sites now includes more information in Setup Audit Trail and Site History about site-related changes to easily track revisions and usage. For example, if you and your teammates are working on creating a new user interface for your Force.com site, all configuration changes will be tracked on the Site History Related List.

Note: Automatically visible to all users. No setup required.

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SITES PACKAGING *(Developer Edition)*
Package Your Force.com Sites-Related Visualforce Pages and Apex Code Classes

- :: Package and distribute applications on the Force.com AppExchange
- :: Use the AppExchange to easily move your Force.com site from one Salesforce instance to another

With Spring '09, you can package sites-related Visualforce Pages and Apex Code. For example, developers may use multiple Developer Editions to test their code. With Sites Packaging, developers can package their Force.com site to the AppExchange and download the package into a different Developer Edition for testing.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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SITES PARTNER PORTAL SUPPORT *(Developer Edition)*
Connect Your Force.com Sites to Your Partner Portal

- **::** Easy sites-to-Partner-Portal integration
- **::** Make it easy for partners to access the Partner Portal from your Force.com site

With Spring '09, you can authenticate your Salesforce CRM Partner Portal users in a sites page, providing seamless integration between your sites and the Partner Portal

Note: Not automatically visible. Feature is enabled, but requires some setup.

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SITES ROBOT.TXT AND FAVICON SUPPORT *(Developer Edition)*
Improve Search Engine Marketing of Your Force.com Sites

- **::** Use robot.txt to tell search engines how to index your site
- **::** Make your site look professional by uploading your personal icon to your site

With Spring '09, you can easily assign a robot.txt and favorite icon files for your Force.com sites.

Your Web site's robots.txt file is used to tell search engine spiders which Web pages of your site to crawl and index as well as which Web pages to ignore. Use the robots.txt file in Force.com sites to prevent search engines from indexing directories that contain duplicate content, files not relevant for search engines (such as images, download links, and admin files), or sensitive information such as customer info, emails, and phone numbers.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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SITES STANDARD PAGES *(Developer Edition)*
Control Standard Page Visibility of Your Force.com Sites

- **::** Place your internal Salesforce CRM standard pages on your public site
- **::** Use the point-and-click user interface to quickly add your standard pages

With Spring '09, you can control the visibility of certain standard pages, such as the Home Tab, search, Ideas, and lookup pages for your public sites. For example, if you'd like to show your internal Ideas page to your public site, you can use our point-and-click user interface to add this standard page to the available pages in your site.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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DASHBOARD FINDER *(All Editions)*
Find Dashboards More Quickly

- **::** View dashboards relevant to your role
- **::** Customize your dashboard experience without affecting others

Use the Dashboard Finder to type in any portion of a folder or dashboard name to get a list of matching dashboards. Instead of traditional bookmarks, you use a Facebook-style search box that suggests dashboards that match your search.

Note: Automatically visible to all users. No setup required.

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Logic

CROSS-OBJECT WORKFLOW FOR CUSTOM OBJECTS *(All Editions)*
Update Parent Fields from Child Records in Custom Objects without Code

:: No coding needed to create workflow between objects
:: Create richer application logic

With Spring '09, you can update a field on a parent record by creating a field update action for a workflow rule created on a child record. When working with a many-to-many relationship object, you can update fields on either parent.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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DELEGATED DATA ADMINISTRATION *(Enterprise, Unlimited, and Developer Editions)*
Delegate Data Administration to Non-Admin Users

:: Grant View All Records on any object to non-administrators
:: Grant Modify All Records on any object to non-administrators

With Spring '09, you can grant users Read or Full access to all records in any object without giving the Modify or View All Data administration permissions or requiring complex sharing rules. These permissions let users report, search, modify, transfer, share, unlock, or approve any record regardless of sharing settings on an object basis.

Some use examples include:
- **Sales Operations Data Quality Engineer**
  Ability to modify, de-duplicate, and transfer all leads and contacts without granting access to other objects
- **Time-Off Manager Application Report Writer**
  Ability to run reports across all time-off requests while still being able to submit personal time-off requests subject to normal sharing restrictions

Note: Not automatically visible. Feature is enabled, but requires some setup.

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Database

SUMMARY REPORT DATA SNAPSHOTS *(Professional, Enterprise, Unlimited, and Developer Editions)*
Analyze Sales Pipeline and Marketing Metrics for Long-Term Trends

:: Create key historical dashboards of metrics and KPIs

:: Get fast analysis of long-term trends

Summer ’08 let you create data snapshots using tabular report data. With Spring ’09, you can “snapshot” summary data in a report. Using an Analytic Snapshot on a summary report, you can track large amounts of summary data to create historical views of metrics, key performance indicators (KPIs), and other summary data such as average days to close, average days in-stage, or percentage of lost opportunities. You can then use these stored metrics in reports and dashboards.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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DATA GROUPING FUNCTIONS *(All Editions)*

Analyze Aggregate Data

:: Use clicks, not code to analyze trend data
:: Evaluate differences between months/weeks/days of data

Before Spring ’09, you had to use Microsoft Excel to look at differences in your pipeline over time. With Spring ’09, you can use the group value, parent group value, and context choice for Custom Summary Formula fields to analyze trends in your data.

Note: Automatically visible to all users. No setup required.

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Integration

BROADER COMPATIBILITY WITH EXTERNAL WEB SERVICES *(Enterprise, Unlimited, and Developer Editions)*

Support for a Wider Range of WSDL Types

:: Support for more WSDL types
:: Relaxed timeout limits on callouts

Force.com lets you call out to external Web services to get data for mashups or to exchange data with on-premise applications. Spring ’09 supports a wider range of WSDL types such as ref, attribute, any, and all, so you can consume Web services with these types without having to modify the service.

Apex callout time limits have been relaxed to allow calls lasting up to 1 minute. Developers who want calls to time out sooner can set a custom timeout value.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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Development

APEX CODE AUTO-COMPLETE IN FORCE.COM IDE *(Enterprise, Unlimited, and Developer Editions)*

Write and Test Code Efficiently

:: More productive coding experience

:: Easier to find code for testing

Auto-complete in the Force.com IDE makes the Apex coding experience much more efficient and less error prone. The feature includes code assistance for built-in and user-defined classes, schemas, or objects.

Note: Automatically visible to all users. No setup required.

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Global, Trusted, Secure Infrastructure

API DATA REPLICATION ENHANCEMENTS *(Enterprise, Unlimited, and Developer Editions)*

Replicate Your Organization's Data to On-Premise Data Stores

:: Provide easy data backups
:: Flexibility to store any data anywhere

With Spring '09, Force.com enables data replication for a much wider range of objects. Take advantage of the highly efficient data-replication mechanisms available in the Force.com API to create offline copies of your organization's data.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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ACCESS TO EMAIL LOGS IN THE APPLICATION *(All Editions)*

Track Email Deliverability from Salesforce CRM Service

:: Confirm that customers are receiving emails
:: Troubleshoot email delivery issues

With Spring '09, you can run reports on the email logs. If you're having trouble getting emails delivered, inspect all outbound email logs from Salesforce CRM.

Note: Automatically visible to all users. No setup required.

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Force.com AppExchange

ENHANCED SEARCH (*All Editions)*

Find the On-Demand Application You Need Easily

:: Find apps that meet your business needs quickly and easily
:: Compare apps across multiple dimensions such as price, support, and system requirements

With 800+ preintegrated solutions on the Force.com AppExchange, you don't want to miss the one that can transform your business. Our newly designed site helps you easily locate an application and compare it to similar solutions, just as you would when looking for a book on Amazon.com. The new features help you narrow your search to find the app that's just right for your business.

- **Compare apps side by side**
  Using our application comparison matrix, you can select up to three apps to review side by side on dimensions such as average star rating, price, components, languages and editions supported, and system requirements.
- **Narrow your search through multi-category selection**
  With our new category structure, you can now choose multiple areas of interest to refine your search. For example, to find a marketing solution related to the financial services industry, you simply check the two related boxes to receive a relevant list of apps.
- **Browse lists easily**
  The redesigned AppExchange provides app hovers so you can easily browse popular lists such as Native Apps, Latest Listings, and Top Ten Installs.

Note: Automatically visible to all users. No setup required.

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MULTIPLE PACKAGE RELATIONSHIPS *(For Partners)*

Associate Your Force.com Package with Multiple Listings

:: Let partners consistently track activity for their listing across multiple versions
:: Let partners easily administer their app across multiple exchanges

As part of the redesigned Force.com AppExchange, partners can now associate multiple packages with a single listing. For example, you could simply associate a new version of an AppExchange package with your listing and “turn off” the older version instead of completely replacing it. With this capability, partners can consistently track installs for their applications across multiple versions. The new AppExchange schema also lets partners associate a package with a listing on another exchange. For example, if partners want to list on the Japanese-language exchange and the AppExchange, they could associate a single package with listings on both exchanges.

Note: Automatically visible to all users. No setup required.

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Salesforce CRM Sales

OPPORTUNITY GENIUS *(Enterprise and Unlimited Editions)*
Tap into the Collective Wisdom of Your Sales Organization

:: Find opportunities similar to the deals you're working and reach out to the reps who closed them
:: Leverage what your organization's already learned about selling deals like yours
:: Configure how Salesforce CRM searches for similar deals to ensure the ones we find are tuned to your organization

Successful sales organizations share and internalize best practices to make sure every rep is armed with the knowledge needed to close their deals. Reps can use Opportunity Genius to reach out to each other directly and learn from the experience of their colleagues.

- Search based on the fields you filled out on your opportunity.
- Admins can tune the matching criteria to fit your sales organization.
- Bookmark similar opportunities against your own to track these reference deals as yours progresses.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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TIME PICKER FOR EVENTS *(All Editions)*
Create Events Quicker Using the Time Picker

:: Eliminate unnecessary typing when scheduling events
:: Create events with one-click start and end times

With Spring '09, you can create new events more easily using the Time Picker. You can select common start and end times wherever you create events, either on the new event page or with Click and Create Events. For most events, you no longer have to type to pick start and end times, meaning fewer clicks.

Note: Automatically visible to all users. No setup required.

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DASHBOARD FINDER *(All Editions)*
Find Dashboards More Quickly

:: View dashboards relevant to your role
:: Customize your dashboard experience without affecting others

Use the Dashboard Finder to type in any portion of a folder or dashboard name to get a list of matching dashboards. Instead of traditional bookmarks, you use a Facebook-style search box that suggests dashboards that match your search.

Note: Automatically visible to all users. No setup required.

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Salesforce CRM **Marketing**

CAMPAIGN MEMBER ENHANCEMENTS *(Enterprise and Unlimited Editions)*
Edit Campaign Member Lists with a Few Clicks

:: Expose the campaign member list for easy viewing and editing

Spring ’09 significantly enhances the Campaign Member feature with the ability to manage members from the detail page. The easy-to-access view of all campaign members also makes it easier to create filters and segmentation for specific campaigns.

Note: Automatically visible to all users. No setup required.

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Salesforce CRM **Customer Service & Support**

CTI SUPPORT FOR FIREFOX BROWSER *(Professional, Enterprise, and Unlimited Editions)*
More Flexibility for Your Call Center

:: Enable CTI Toolkit functionality in the Firefox browser

With Spring ’09, you have more flexibility in selecting browsers for your Call Center agents with CTI support for the Firefox browser. Managing different types of agents—such as home-sourced, outsourced, or in-sourced—requires adapting to different agent models and requirements quickly.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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EMAIL-TO-CASE AS A SERVICE *(Professional, Enterprise, and Unlimited Editions)*
Manage Your Email Channel in the Cloud

:: Simplified administration for email handling

Email continues to grow as the preferred contact method for customers. With Spring ’09, you can run reports of all email logs and inspect all outbound email logs from Salesforce CRM. With Email-to-Case as a service, you can also monitor your commitments in responding to those emails to generate a comprehensive customer history.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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GLOBAL BUSINESS HOURS FOR HOLIDAYS *(Professional, Enterprise, and Unlimited Editions)*
Provide Consistent Service Delivery During the Holidays

:: Monitor holiday times when tracking customer commitments

With Spring ’09, you can track holiday events within global business hours across a single organization. Monitor service delivery during the holidays around the world for multiple time zones more effectively. With holiday tracking, you have greater visibility and reporting capabilities during the holidays.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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Salesforce CRM **Customer Portal**

CUSTOMER ADMINISTRATION *(Enterprise and Unlimited Editions, Custom Portal Only)*
Simplify Administration by Letting Customers Manage Their Users

- :: Let customers manage their users without administrators
- :: Keep customers’ user data up to date

Managing complex customer relationships in a B2B environment can be extremely time-consuming as administrators try to track who is in or out. Plus, this effort is often a manual process that isn’t strategic to your business. Without having correct information on your customers, you can’t accurately scale programs and service offerings. With customer administration in Spring ’09, your customers can add, activate, and deactivate their users as needed. That means they always have access to correct user data and the time to focus on developing successful relationships with your customers.

Note: This feature is not enabled by default for Salesforce CRM Customer Portal customers. User profiles must be configured to grant users the permission to manage users.

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Salesforce CRM **Partner Networks**

SHARING WITH MULTIPLE PARTNERS *(Group, Professional, Enterprise, and Unlimited Editions)*
Share the Same Record with Multiple Companies

- :: Set up one-to-many connections with just a few clicks
- :: Collaborate on the same record with multiple channel partners

If you share leads or opportunities with multiple partners, you can now share the same record with multiple partners at once. Spring ’09 makes partner-to-partner collaboration possible, so that a vendor can share the same opportunity downstream—with an ISV partner, reseller, or distributor—and upstream with the supplier.

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CONNECTION INVITATION TEMPLATES *(Enterprise and Unlimited Editions)*
Create Templates for Sending Consistent Connection Invites

- :: Create templates for use with similar types or tiers of partners
- :: Save time by not having to choose which records to share
- :: Establish consistent record sharing practices with structured templates

Setting up connections is just like asking a colleague or friend to connect with you on LinkedIn. You simply send an invitation and once your partner accepts that invitation, you have instant access to the information that you’ve both determined you’d like to share with the other. In Spring ’09, you have the ability to create and use Connection Invitation Templates. So instead of choosing what records you'd like to share with each partner one-by-one, you can create common templates and use them when inviting similar types or tiers of partners to share information with you.

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SHARE PRODUCTS WITH PARTNERS *(Enterprise and Unlimited Editions)*

Give Your Channel Partners Access to Product Information

:: Provide product-level visibility to your channel partners
:: Let channel partners attach product SKUs during deal registration

With Spring '09, you can share your product SKUs with resellers and distributors so they have synchronized, real-time product information. Partners can also register new opportunities with the right product information attached.

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PARTNER PORTAL FOR SERVICE PARTNERS *(Enterprise and Unlimited Editions)*

Grant Partner Portal Access to Your Channel Service Partners

:: Let third-party channel service partners resolve your customer cases through the Partner Portal
:: Keep internal and external service reps on the same page
:: Provide a cost-effective service solution to third-party service providers

With Spring '09, you can easily outsource service management by allowing third-party service reps to manage customer cases via the Partner Portal. Service partners can do everything they need to resolve customer support issues: search the solution database, disposition cases, make case comments, and run reports. The Salesforce CRM Partner Portal now offers a powerful and affordable solution for your service partners.

- **Create, edit, and update cases**
  Let partner users create, edit, and update cases.
- **Search and attach solutions**
  Partner users can search for solutions and attach them to cases directly within the Partner Portal.
- **Reports for channel service partners**
  Service partners can run reports on all outstanding cases assigned to or created by them.

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CASES FOR PARTNERS *(Enterprise and Unlimited Editions)*

Allow Channel Partners to Log Support Cases

:: Let channel partners log support cases in the partner portal
:: Let channel partners self-service support cases with access to a solution database

Improve partner satisfaction and success by letting partners log support cases via the Partner Portal. Channel operations managers can use the powerful Salesforce CRM Customer Service & Support application to manage all their partner support issues. Facilitate resolving service issues by letting partners search the solution database for solutions to common channel program issues.

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EMAIL FOR PARTNERS *(Enterprise and Unlimited Editions)*

Allow Channel Partners to Send Emails Using Your Templates

:: Let channel partners send emails to your end customers from within the Partner Portal
:: Provide custom email templates to channel partners to control your branding

Increase partner productivity and effectiveness by letting partners send emails based on your templates to customers and prospects. Providing predefined email templates lets you control branding and messaging to the end customer. Plus, it provides a history of the email interactions between your partners and your end customers.

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SALESFORCE TO SALESFORCE API *(Enterprise and Unlimited Editions)*

Execute Powerful Automated Sharing Rules

:: Share information automatically based on predetermined criteria
:: Save time and effort with automated business processes
:: Ensure scalable collaboration best practices across your entire partner ecosystem

In Spring '09, we've opened our API so you can create rules that will automatically share records with your business partners based on criteria you choose. For example, rather than manually choosing the partners with which you want to share information, you can set up a rule that automatically shares opportunities within a particular zip code with one or more partners in your ecosystem that are located closest to the opportunity.

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Salesforce CRM **Content**

CONTENT DELIVERY *(Professional, Enterprise, and Unlimited Editions)*

Send and View Documents without Attachments

:: Send documents as URLs for convenient viewing and distribution
:: Track when prospects or customers view your content

Are your users annoying prospects by sending 5MB file attachments? Now, reps can sell more effectively with Content Delivery, which transforms files into URL links they can send to external recipients. Best of all, you can track which recipients look at your content, helping you get a sense of those who might become prospects.

- **No downloads required**
  Users can send files that customers or prospects don't have to download to their computers. Documents are now as easy to share and view online as photos.
- **Choice of view**
  Content recipients can view documents they receive online in their browser or download them to their computers in either the original file format or as a PDF.

Note: Please contact Salesforce.com Customer Service & Support to have this feature enabled.

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PRESENTATION ASSEMBLY *(Professional, Enterprise, and Unlimited Editions)*

Assemble Online Presentations with Drag-and-Drop Ease

:: Create custom presentations without ever downloading a file
:: Search every slide in your company's library for the best content
:: Drag and drop to easily arrange slides online

Create a new custom presentation by leveraging existing presentations and slides. With Presentation Assembly in Spring '09, your sales reps can quickly and easily create customized sales presentations tailored to the needs of their prospects.

- **Full text search**
  Search every word on every slide and find the most relevant content across your entire company.
- **Drag-and-drop assembly**
  Drag slides from search results into your custom presentation and rearrange slides within a simple, visually intuitive interface.

Note: Automatically visible to all users. No setup required.

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CONTENT PACKS *(Professional, Enterprise, and Unlimited Editions)*
Package Multiple Documents for Convenience and Distribution

:: Create an online package of sales collateral for a customer or prospect
:: Deliver a fast and easy viewing experience that requires no downloads
:: Track which documents your prospect looks at, down to the page view

Marketing often wants to create a standard "prospecting pack" for a certain product or service. And reps may need to send multiple pieces of related sales content—a fact sheet, a white paper, and a customer testimonial—to a prospect. Content Packs lets you group these materials together, so your reps can find and send them all in one shot.

- **Fast viewing of sales collateral**
  Recipients of Content Packs get a simple visual representation of the documents that lets them see the file format, the cover, and easily flip through each document.
- **Custom branding**
  Deliver a custom experience for your prospects and customers by branding the online view used to display the documents you sent.

Note: Automatically visible to all users. No setup required.

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INLINE CONTENT VIEWS *(Professional, Enterprise, and Unlimited Editions)*
Preview Full Documents and Files Prior to Download

:: View high-quality images of your documents directly within your browser
:: View documents inline or expand to view in full-screen mode

When you're looking for a document, you don't want to wait for a file to download just to confirm the document is what you expected. Using Salesforce CRM Content, you can view PDFs, images, and most PowerPoint, Word, and Excel files right within your browser.

Note: Automatically visible to all users. No setup required.

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CONTENT IN SANDBOX *(Enterprise and Unlimited Editions)*
Test Content Configuration Prior to Deployment

- :: Test changes to your Salesforce CRM Content deployment before going live
- :: Experiment with new content functionality in a secure mirrored test environment

Test a new content configuration before deploying it live. With Spring '09, you can use your existing sandbox environment to test new configurations of Salesforce CRM Content.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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Salesforce CRM **Ideas**

VISUALFORCE THEME FOR IDEAS *(Enterprise and Unlimited Editions)*
Out-of-the-Box Visual Template for Ideas Public Sites

- :: Get your Ideas Public Site up and running with a predefined, compelling user interface

Visualforce Theme for Ideas makes it easy to set up an Ideas public site with a compelling user experience right out of the box. The feature also allows for additional customization on top of the existing user interface.

Note: Visualforce Theme for Ideas is a limited-release feature. Please contact Salesforce.com Customer Service & Support to have this feature enabled.

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SUGGESTED DUPLICATES *(Enterprise and Unlimited Editions)*
Maintain High-Data Quality and Scale Your Community with Enhanced Management Features

- :: Reduce duplicate postings through an automated suggestion engine

As communities and activity volume grow over time, streamlining community management becomes increasingly important. With Spring '09, Suggested Duplicates is generally available in the Salesforce CRM Ideas application to prevent duplicate postings. The feature also points community members to additional relevant conversations.

Note: Automatically visible to all users. No setup required.

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Salesforce CRM **Mobile**

DASHBOARDS FOR IPHONE *(Professional, Enterprise, and Unlimited Editions)*
Instantly View Sales Pipeline and Reporting Data on Your iPhone

- :: View your most important reporting data while on the road

One of the most compelling new features for the iPhone in Spring '09 is the ability to view Salesforce CRM dashboards. Dashboards on Salesforce CRM Mobile are perfect for managers or employees who want a quick look at their sales pipeline reporting data while on the road.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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VISUALFORCE MOBILE AND WEB TABS FOR IPHONE *(Professional, Enterprise, and Unlimited Editions)*
Integrate Web Functionality into Salesforce CRM Mobile

:: Create any form or wizard in Salesforce CRM and make it available via the iPhone

Visualforce Mobile on the iPhone combines the power of Visualforce with the exceptional usability of the iPhone browser, producing the most advanced user experience to date for Salesforce CRM Mobile customers. With Visualforce Mobile and Web Tabs, the mobile platform has the potential to extend all the functionality not available with the current "object-only" Mobile client. Administrators can create any form or wizard and make it available as a tab in the Mobile application. They can also create Visualforce pages and mobilize them to address field-based business needs.

Note: Not automatically visible. Feature is enabled, but requires some setup.

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LOG-A-CALL POP-UP FOR IPHONE *(Professional, Enterprise, and Unlimited Editions)*
Log Important Call Details Easily from Your iPhone

:: One-click phone call and appointment logging

The Log-a-Call feature lets iPhone users log a phone call with a single click. A pop-up prompt appears the next time the user returns to the Salesforce CRM Mobile application, and a prepopulated Task reminds the user to log the call. This feature can be turned on or off by the user.

Note: Automatically visible to all users. No setup required.

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CONTACT ROLES FOR WINDOWS MOBILE *(Professional, Enterprise, and Unlimited Editions)*
Locate Key Contacts Instantly

:: Display key contact information with a single click

The Contact Roles feature for Windows Mobile users streamlines the search process when trying to identify key stakeholders in an Account record. Instead of sifting through the details of a record, the Contact Roles feature displays a related list of relevant Contacts and their roles. A single click on the Contact's name reveals key information and click-to-call or email capabilities. This feature is especially helpful when you're trying to look up information on the go.

Note: Automatically visible to all users. No setup required.

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RELATED RECORDS SEARCH FOR WINDOWS MOBILE *(Professional, Enterprise, and Unlimited Editions)*
Broaden Your Search Results Faster

:: Find related records by using the Find More button

On a standard mobile device, users may not have all the records related to a particular record. The Related Records Search feature for Windows Mobile lets users find related records with a Find More button that generates a list of additional related records. Users can then click any of these records and download them to the mobile device.

Note: Automatically visible to all users. No setup required.

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ONE-CLICK INSTALLATION FOR BLACKBERRY *(Professional, Enterprise, and Unlimited Editions)*

Easily Download Your Salesforce CRM Application to Your BlackBerry

:: Download the Salesforce CRM Mobile for BlackBerry application with one click

Installing Salesforce CRM Mobile on the BlackBerry makes it easier and faster for new users to get started. The new one-click installation streamlines the download process by reducing the number of the steps from two to one.

Note: Automatically visible to all users. No setup required.

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DEVICE ASSIGNMENT SECURITY CONTROL *(Professional, Enterprise, and Unlimited Editions)*

Implement a Quick, Secure Response to Lost or Stolen Devices

:: Mobile administrators can implement a one-user/one-device policy
:: Quick, secure response to lost or stolen devices

An administrator can use this feature to lock users to a single mobile device so they can't install Salesforce CRM Mobile on any other devices. This functionality limits the possibility of a security breach and helps administrators manage deployed devices.

Note: Automatically visible to all users. No setup required.

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