Spring Into the Cloud: Spring '09 Release

Salesforce.com Community most requested features

FOR PARTNERS:

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

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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 **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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