



Spring Into the Cloud: Spring '09 Release

💡 Salesforce.com Community most requested features

FOR SALES PROFESSIONALS:

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.



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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 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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