



Spring Into the Cloud: Spring '09 Release

💡 Salesforce.com Community most requested features

FOR SUPPORT 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 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 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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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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