



Sail to Success with Summer '09

= Salesforce.com Community most-requested features

The World's Most Complete Sales Application

Comprehensive and easy to customize, the Sales Cloud helps companies manage people and processes more effectively. Your reps will get the tools they need to build stronger relationships and close more deals. Managers get real-time visibility into the team's sales performance, plus the power to instantly make changes as the business changes.

Sales Cloud

Chart Analytics 2.0
List Views for Sales Teams
Recurring Tasks

Marketing

Automated Campaigns

Partners

Partner Portal Administration Tools

Mobile

iPhone Users and BlackBerry Users
Support for Multiple Languages
iPhone Users
Custom List Views
Standard List Views
Calendar-Like Event List View
Clone Records
Convert Leads
Easy Log Out
Opportunity-Product, Case-Solution, Contact Roles
Visualforce Mobile 2.0
BlackBerry Users
Clone Records
Easy Log Out
Easy Access to Related Lists
Visualforce Mobile 2.0

Join the Conversation with the Leader in Customer Service

Today, keeping customers satisfied means connecting with them everywhere they turn for service, whether that's the phone, email, or—increasingly—the Internet. The Service Cloud connects you to it all: your call center, your Web self-service community, even social networks such as Facebook and Twitter. All on a single, cloud-computing platform.

Service Cloud

Cases in Salesforce to Salesforce
Advanced Customer Portal User Management
Advanced Case Workflow

Build and Run your Custom Apps on the Force.com Platform

Your Cloud refers to the customized applications you can build using the Force.com platform. With Your Cloud, you can extend Salesforce CRM into other areas such as HR and financial services, tailor the application to match your business processes, or create a new application to address your specific needs.

Custom Cloud

Workflow Visualizer
Application Distribution: Versioning, Tracking, and Deprecation Support
Visualforce Support within Dashboards and Help
Generic "From" Email Address Support
Enhanced Declarative Logic for Picklists
Force.com Profile Enhancements
Profile Sharing Overrides
Profile Change Tracking
Sites Usage Alerts
Sites Usage Reporting
Sites Auto-Cache Support
Force.com IDE for Summer '09



Sales Cloud

CHART ANALYTICS 2.0 *(All Editions)*

Gain real-time insights faster and more easily with enhanced charts

- :: Get more insights from charts with added overlay data
- :: Present information in new, intuitive ways with added chart types
- :: Increase data comprehension with new charting colors and displays

Summer '09 introduces a new look and feel to Salesforce CRM dashboard and reporting charts. The Salesforce CRM charting engine has been redesigned with new displays, new colors, and two new chart types. With new chart designs, you can make quicker decisions and get more information with added charting metrics.

- **Data overlay on charts**

No more estimating data based on the size of a bar or the thickness of a pie wedge. Now you can see your data accurately and in context, directly on (or next to) each chart component.

- **New chart types: the funnel and the donut**

You can now see your pipeline and revenue performance at a glance. With the new funnel chart, pipeline data can be shown by stage in an intuitive, directionally oriented fashion. In addition, the new donut chart shows a total sum figure in the center of each chart so that percentage splits are shown in context of the total.

- **Enhanced chart colors and labels**

Reading Salesforce CRM charts just got easier with additional colors and shaded data labels. Your data stands out with more color options, improved label designs, and new customization capabilities.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)

LIST VIEWS FOR SALES TEAMS *(Enterprise and Unlimited Editions)*

Quickly see what you're working on

- :: Use list views to show what accounts or opportunities consider you part of their sales team
- :: Save time by finding critical information easily

With List Views for Sales Teams, account team and sales team members can quickly identify all accounts and opportunities they're working on. This visibility is particularly useful for extended sales team members—such as customer service reps, territory managers, and other sales support roles—who may be responsible for multiple accounts. List Views for Sales Teams will enhance the team selling experience by improving productivity, usability, and visibility for various roles that support the sales team.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)

RECURRING TASKS *(All Editions)*

The ultimate task reminder

- :: Create a repeating series for any task that occurs on a regular basis
- :: Ensure recurring tasks are tracked with your customer data and available for reporting just like regular tasks

With Recurring Tasks, you can create a repeating series of tasks for all those tasks that occur regularly. Set a reminder to call your customer every month to check in. Or add a task for one of your sales reps to send you a weekly forecast update every Friday. And to make sure that all your customer interactions are consolidated in Salesforce CRM, recurring tasks are tracked with your customer data and made available for reporting just like regular tasks.

Note: Enabled for the organization and end users.

[[Back to Index](#).]

Marketing

AUTOMATED CAMPAIGNS *(Enterprise and Unlimited Editions)*

Create sophisticated and automated multiwave campaigns

- :: Send email alerts and track status based on prospect behavior or attribute
- :: Nurture leads with multiwave drip campaign logic
- :: Manage marketing offers and events

The Summer '09 release brings powerful new capabilities, automating multistep campaigns.

- **Auto-response email and updates**

Set up automated emails and field updates based on campaign member behavior and attributes, such as an auto-response email when a product interest box is checked, or an update to the status field when the campaign member has attended an event.

- **Drip campaign logic**

Set up drip campaign logic so that high-scoring leads or campaign members are automatically placed in a campaign with differentiated touch points, while lower scoring leads are nurtured accordingly.

- **Custom campaign member fields**

Facilitate the execution of marketing events by providing a place to attach and track event-specific details, independent of the lead or opportunity. Custom Fields also make it easy to track responses before they qualify as sales leads. [Note: This functionality will be available in mid-July 2009.]

- **Campaign member lookup fields**

Tracking the effectiveness of offers and landing pages is easier than ever with lookup fields that connect prospect data to specific marketing assets.

Note: Enabled for the organization; requires system admin configuration.

[[Back to Index](#).]

Partners

PARTNER PORTAL ADMINISTRATION TOOLS *(Developer, Enterprise, and Unlimited Editions)*

Maintain data quality of portal contacts and accounts

- :: Manage partner accounts and contacts in the partner portal with a few clicks

The Summer '09 release makes it easy to manage partner accounts and contacts, ensuring high data quality in the partner portal:

- **Disable partner accounts and contacts**
Partner accounts and contacts can be disabled to allow powerful administrative processes to take place independently of the partner portal.
- **Merge partner contacts**
You can now merge duplicate contacts so the customer portal account and Salesforce CRM account match each other, even if different information was entered during the registration process.
- **Transfer partner contacts**
Contacts can be reassigned easily to reflect recent account changes, maintaining proper data visibility and access to contacts.

Note: Enabled for the organization and end users.

[\[Back to Index\]](#)

Mobile

For iPhone Users and BlackBerry Users

SUPPORT FOR MULTIPLE LANGUAGES *(Developer, Professional, Enterprise, and Unlimited Editions)*
Access the application in your own language

Mobile CRM expands its support for international languages to now include Japanese, Spanish, German and French—previously only English and Japanese for BlackBerry were available. Although the application always supported data in any language, application menu items and information boxes are now displayed in the default language of the user's smartphone as well. Note that there is no change for Windows Mobile, which is available in English and Japanese only.

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

[\[Back to Index.\]](#)

For iPhone Users

CUSTOM LIST VIEWS *(Developer, Professional, Enterprise, and Unlimited Editions)*
Save time in the field with instant mobile access to your custom-filtered lists

iPhone users can now harness the power of filtered lists. If you created custom filters in the Mobile Admin Console (MAC), you can use those filters on your iPhone. You can use Custom List Views to quickly access the most relevant data by displaying any two fields, filtering those fields, and then sorting them within a list view. For example, a field rep might want to see all accounts in California together with the corresponding billing cities.

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

[\[Back to Index.\]](#)

STANDARD LIST VIEWS *(Developer, Professional, Enterprise, and Unlimited Editions)*
Access quick summaries instead of scrolling through records to find the information you need

Mobile CRM sets a new standard with more standard list views than ever for opportunities, tasks, and cases. The new views show four data fields together to provide deep insight into record details, without having to click through to the record. For example, the new opportunity views show the opportunity name, amount, close date, and probability, sorted by close date. These new views summarize key record data grouped with the other standard and custom list views, making related data easy to access while on the go.

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

[[Back to Index](#)]

CALENDAR-LIKE EVENT LIST VIEW *(Developer, Professional, Enterprise, and Unlimited Editions)*

Review your daily events with ease using this new calendar-style format

In addition to a new date-indexed event list view, mobile users can now browse events through a calendar interface. The top of the list view displays today's events. From this view, you can tap and swipe to the desired month and day. The Today button is always visible to easily return to today's list. To locate the new event list view, toggle the Calendar button at the top of the Events tab.

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

[[Back to Index](#)]

CLONE RECORDS *(Developer, Professional, Enterprise, and Unlimited Editions)*

Clone information from existing records for new ones and get on to your next destination

Save your thumbs! With the new clone feature, mobile users can create a new record from the details of an existing record. Clone works for accounts, contacts, leads, custom objects, and most other objects. To create the new record on the iPhone, simply go to the record you want to clone and tap the Clone button in the new action toolbar at the top of the page. On the BlackBerry, tap the Menu button and find Clone among the options.

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

[[Back to Index](#)]

CONVERT LEADS *(Developer, Professional, Enterprise, and Unlimited Editions)*

Convert leads into opportunities with a few taps and even alert lead owners

Now, iPhone users can convert a lead as soon as a call is finished by completing a single form. Easily create new accounts and contacts or use existing ones. Or create a new opportunity and send an email to the lead owner by going to the desired lead and clicking the Convert Lead button in the action toolbar at the top of the leads page.

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

[[Back to Index](#)]

EASY LOG OUT *(Developer, Professional, Enterprise, and Unlimited Editions)*

Easy-to-use logout feature keeps sensitive Salesforce CRM data safe from information thieves

Mobile users concerned about data security can now lock Salesforce CRM before going to customer meetings to prevent others from seeing sensitive information. From the App Info tab, tap the Log Out button to safely log out. On the iPhone, this button is located in the action toolbar at the top of the app info screen. On the BlackBerry, go to the home screen or system info screen and tap the Menu button to find the option.

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

[[Back to Index](#)]

OPPORTUNITY-PRODUCT, CASE-SOLUTION, CONTACT ROLES *(Developer, Professional, Enterprise, and Unlimited Editions)*

Experience the power of on-the-go related lists to create quotes, find cases, and more

Mobile users can now take advantage of the related list functionality in new and powerful ways to save time in the field and speed workflow. For example, with the opportunity-product feature, you can create quotes for customers on the spot; case-solution makes it easy to look up specific cases and hone in on the most effective option; and contact roles provides better insight into related contacts. Field sales reps can associate a price book with an opportunity and add products, see solutions related to cases, and review contact roles for accounts, opportunities, and cases. These objects can easily be added to the dataset of a mobile configuration in the Mobile Admin Console.

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

[\[Back to Index.\]](#)

VISUALFORCE MOBILE 2.0 *(Developer, Professional, Enterprise, and Unlimited Editions)*

Expand the possibilities of what your mobile device can do with Visualforce Mobile pages

- Salesforce CRM and Visualforce are now more tightly integrated. The previous version of Salesforce CRM for iPhone introduced Visualforce Mobile tabs for developing and deploying specific mobile pages to a handheld device.
- With Summer '09, mobile users can add custom links to records; for example, to link to pictures of a contact right from a contact record or to link to Google news about a company. Users can also create custom links to load a Visualforce Mobile page or any Web page from any record. These links can pass record data (such as the record ID) or user data to create a seamless user experience.
- No more lag time with mobile forms! When users fill out a new form or edit a record in Visualforce Mobile, Salesforce CRM immediately gets the updates. A previous limitation of Visualforce Mobile was that it did not immediately update local data on the device. But now, with a tiny bit of extra code, Visualforce Mobile pages can tell Salesforce CRM to grab updated records when the record is saved.

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

[\[Back to Index.\]](#)

For BlackBerry Users

CLONE RECORDS *(Developer, Professional, Enterprise, and Unlimited Editions)*

Clone information from existing records for new ones and get on to your next destination

Save your thumbs! With the new clone feature, mobile users can create a new record from the details of an existing record. Clone works for accounts, contacts, leads, custom objects, and most other objects. To create the new record on the iPhone, simply go to the record and tap the Clone button in the new action toolbar at the top of the page. On the BlackBerry, tap the Menu button and find Clone among the options.

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

[\[Back to Index.\]](#)

EASY LOG OUT *(Developer, Professional, Enterprise, and Unlimited Editions)*

Easy-to-use logout feature keeps sensitive Salesforce CRM data safe from information thieves

Mobile users concerned about data security can now lock Salesforce CRM before going to customer meetings to prevent others from seeing sensitive information. From the App Info tab, tap the Log Out button to safely log out. On the iPhone, this button is located in the action toolbar at the top of the app info screen. On the BlackBerry, go to the home screen or system info screen and tap the Menu button to find the option.

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

[\[Back to Index.\]](#)

EASY ACCESS TO RELATED LISTS *(Developer, Professional, Enterprise, and Unlimited Editions)*

Embedded related lists save time and effort when you're on the move

Related lists are a key feature in Salesforce CRM, but accessing them while on the go required extra tapping and scrolling—until now. With the Summer '09 release, related lists are embedded on the detail screen, making them easy to find and instantly accessible. No more navigating to find what you need!

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

[[Back to Index.](#)]

VISUALFORCE MOBILE 2.0 *(Developer, Professional, Enterprise, and Unlimited Editions)*

Expand the possibilities of what your mobile device can do with Visualforce Mobile pages

- Salesforce CRM and Visualforce are now more tightly integrated. The previous version of Salesforce CRM for iPhone introduced Visualforce Mobile Tabs for developing and deploying specific mobile pages to a handheld device.
- With Summer '09, mobile users can add custom links to records to do things such as linking to pictures of a contact right from the contact record or linking to Google news about a company. Users can also create custom links to load a Visualforce Mobile page or any Web page from any record. These links can pass record data (such as the record ID) or user data to create a seamless user experience.
- No more lag time with mobile forms! When users fill out a new form or edit a record in Visualforce Mobile, Salesforce CRM immediately gets the updates. A previous limitation of Visualforce Mobile was that it did not immediately update local data on the device. But now, with a tiny bit of extra code, Visualforce Mobile pages can tell Salesforce CRM to grab updated records when the record is saved.

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

[[Back to Index.](#)]



Service Cloud

CASES IN SALESFORCE TO SALESFORCE *(Developer, Group, Professional, Enterprise, and Unlimited Editions)*

Share cases across organizations with Salesforce to Salesforce

- :: Let third-party channel service partners resolve the customer cases you share with them
- :: Keep internal and external service reps on the same page
- :: Provide a cost-effective service solution to third-party service providers

With Summer '09, you can share cases with any organization that uses Salesforce CRM. Publish only the information you need to share, down to the field level. Collaborate in real time on customer issues without the hassle of duplicating information or emailing redundant updates back and forth. Or subscribe to cases or customer information from another company. Best of all, you can set it up in minutes with a point-and-click wizard.

Note: Enabled for the organization and end users.

[\[Back to Index\]](#)

ADVANCED CUSTOMER PORTAL USER MANAGEMENT *(Developer, Enterprise, and Unlimited Editions)*

Easily manage your portal user community

As more Salesforce CRM customers take advantage of our customer portal technology, they need more advanced user management capabilities. That's why, in Summer '09, you can manage your portal user communities in new ways:

- Merge accounts and contacts across customer and partner portals
- Disable contacts in customer portals
- Change accounts for portal contacts
- Combine duplicate portal and non-portal contacts
- Delete unwanted portal accounts and contacts

With these new features, you can avoid creating duplicate customer information and ensure that the right contacts get access to the right portals and that all portal accounts and contacts are valid.

Note: Auto-enabled; does not require Customer Support.

[\[Back to Index.\]](#)

ADVANCED CASE WORKFLOW *(Developer, Enterprise, and Unlimited Editions)*

Deliver faster service to your customers

In Summer '09, we enhanced workflow functionality on cases so you can deliver even faster service. In addition to automatically updating fields based on a change in case comments, you can fire off an email alert so the right person is immediately notified.

Note: All standard workflow profile and access controls apply. Automatically visible to users with workflow admin access.

[\[Back to Index.\]](#)



Custom Cloud (Our Platform)

WORKFLOW VISUALIZER *(All Editions)*

Get a visual representation of your approval process at a glance

- :: Manage workflows with an easy-to-understand, interactive tool

Easily manage complex workflows with the Graphical Viewer for Workflow, an interactive visual representation of all workflows, approvers, and actions. You can follow workflows from beginning to end and see what happened at each juncture.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)

APPLICATION DISTRIBUTION: VERSIONING, TRACKING, AND DEPRECATION SUPPORT

(Developer Edition)

Easily Manage and Upgrade Applications

- :: Evolve applications while maintaining backwards compatibility
- :: Spend less time tracking versions of managed packages
- :: Safely deprecate Apex global classes, methods, and more

Salesforce.com partners can now evolve their apps while maintaining full backwards compatibility—just like salesforce.com. Ever wanted to make drastic behavior changes in Apex while ensuring existing customer integrations continue to work? Now you can, thanks to the new versioning capabilities for managed packages. The following components can now integrate with a specific version of a managed package: Apex classes, triggers, Visualforce Pages, Visualforce components, Visualforce email templates, and the Enterprise and Partner API.

With the new Apex deprecation capabilities in Summer '09, any partner using a managed package can stop distribution of any global Apex identifier such as classes, methods, and variables. We've also simplified how package versions are managed by introducing a formal bookkeeping process. Each package upload is now carefully identified with a unique version and upload number. This capability greatly reduces the administration overhead required to manage changes and uploads.

Note: Not auto-enabled; must be enabled by Customer Support.

[\[Back to Index.\]](#)

VISUALFORCE SUPPORT WITHIN DASHBOARDS AND HELP *(Group*, Professional, Enterprise, Unlimited, and Developer Editions)*

Create rich, customized dashboards and help pages

- :: Create rich, custom dashboards by using Visualforce Pages as components
- :: Provide rich help pages on custom objects

Enjoy the same customization capabilities for help pages and dashboards. You can now use Visualforce Pages as components within dashboards and as help targets on custom objects, which was previously possible only with S-controls. For example, you can create a dashboard for sales reps showing a geographic distribution of deals for their teams, together with standard metrics displayed graphically on a map. Or create a visual help screen to guide users through a custom application.

Note: Enabled for the organization and end users.

* Only custom object help support is available in Group Edition because creating/editing dashboards is not generally available in Group Edition

[\[Back to Index.\]](#)

GENERIC “FROM” EMAIL ADDRESS SUPPORT *(All Editions)*

Effectively emails customers using aliases

- :: Let users send emails from a generic email address
- :: Easily manage user profile access to org-wide email aliases

You can now set up generic email addresses that can be used by all users in an org. With this feature, you can send emails from email aliases such as sales@acme.com or support@acme.com. These addresses can also be linked to a user profile to control who can access and use the addresses.

Note: Enabled for the organization and end users.

[[Back to Index.](#)]

ENHANCED DECLARATIVE LOGIC FOR PICKLISTS *(All Editions)*

Conditional business logic based on picklist values

- :: Increase administrator productivity
- :: Create conditional business logic without code

Non-technical administrators can now add sophisticated business logic customizations without writing code. You can trigger workflows and approvals from picklists based on the value a user chooses using the TEXT() function. Examples include triggering a workflow if the value exceeds a specified amount or populating another field on the page. You can also conditionally require multi-select picklists and determine whether a multi-select picklist is empty by using the INCLUDES(), ISNULL(), PRIORVALUE(), and ISCHANGED() functions.

Note: Enabled for the organization; requires system admin configuration.

[[Back to Index.](#)]

FORCE.COM PROFILE ENHANCEMENTS *(Enterprise and Unlimited Editions)*

More control in managing your set up and data

- :: Effectively manage setup configurations
- :: Manage data for all objects

Enhancements to Force.com profiles reduce the time needed to make changes in an organization and give users more control over their particular functions. For example, you can now easily transfer records to share with others.

Note: Enabled for the organization, but not automatically enabled for Force.com end users.

[[Back to Index.](#)]

PROFILE SHARING OVERRIDES *(Professional, Enterprise, Unlimited, and Developer Editions)*

Easily find overrides for individual objects

- :: Quickly identify security issues
- :: Effectively manage exceptions to sharing settings

Administrators can now see which profiles may override individual object-sharing settings, reducing the time it takes to identify security exceptions.

Note: Enabled for the organization and end users.

[[Back to Index.](#)]

PROFILE CHANGE TRACKING *(Enterprise, Unlimited, and Developer Editions)*

Easily track important profile changes

- :: Audit field-level security
- :: Audit permissions
- :: Facilitate audit compliance

Administrators and auditors can now track who made changes, when those changes were made, and the specifics of those changes. For example, an auditor can see who provided read/write access to the Salary field for the Standard User Profile on a specific date.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)

SITES USAGE ALERTS – PILOT *(Enterprise, Unlimited, and Developer Editions)*

Use workflow to send notifications based on site usage

- :: Automate the monitoring of daily site usage

You can now specify a custom workflow to send notifications based on daily site usage. For example, if a site is reaching its daily bandwidth or request-time limits, this feature can automatically notify the person designated to handle the situation.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)

SITES USAGE REPORTING *(Enterprise, Unlimited, and Developer Editions)*

Track site page views, bandwidth, and request times

- :: Track site traffic by day or month
- :: Monitor site performance for visitors

Now you can see how much traffic is coming to your site and generate daily or monthly reports. You can access the new sites usage reports in the “Administrative Reports” category and filter on a date range or billing month. You can also run reports on page views, bandwidth, and request times.

Note: Enabled for the organization; requires system admin configuration.

[\[Back to Index.\]](#)

SITES AUTO-CACHE SUPPORT *(Enterprise, Unlimited, and Developer Editions)*

Make your site faster

- :: Improve site performance
- :: Enhance the user experience

Force.com now automatically adds cache headers to Visualforce pages if those pages are not defined to improve site performance. You can leverage the out-of-the-box caching features to improve site performance and the user experience by setting the cache attribute in Visualforce pages to “true” and setting the desired number of seconds.

Note: Enabled for the organization; requires system admin configuration.

[\[Back to Index.\]](#)

FORCE.COM IDE FOR SUMMER '09 *(Enterprise, Unlimited, and Developer Editions)*

Advanced capabilities for your Force.com projects

- :: Upgrade Force.com projects to Eclipse 3.4
- :: Incorporate new metadata types

In Summer '09, the Force.com IDE can work with new metadata types such as Dimensions. Existing Force.com projects can upgrade to Summer '09 with the project upgrade wizard. The latest Force.com IDE also supports the latest version of Eclipse, version 3.4.

Note: Enabled for the organization and end users.

[\[Back to Index.\]](#)