



# Dream more with Winter '10

= Salesforce.com Community most-requested features

Sales  
Cloud

## 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 – Analytics

Real-Time Quotes (pilot)   
Dashboard Microscope   
Color Picker   
Chart Mixer

### Sales Cloud – Marketing & Leads

Campaign Scoreboard  
Campaign Assistant

### Sales Cloud – Partners

Shared Attachments  
Partner Finder

### Sales Cloud – Content

Mobile Content for iPhone and BlackBerry

### Sales Cloud – Mobile

Mobile Content for iPhone and BlackBerry  
Mobile Connection Via SSL

Service  
Cloud

## 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 – Knowledge

Knowledge

### Service Cloud – Social

Salesforce for Twitter

### Service Cloud – Analytics

Dashboard Microscope   
Color Picker   
Chart Mixer

### Service Cloud – Partners

Shared Attachments  
Partner Finder

### Service Cloud – Content

Mobile Content for iPhone and BlackBerry

Custom  
Cloud

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

The Custom Cloud refers to the customized applications you can build using the Force.com platform. With the Custom 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 – Programmable Cloud Logic

Batch Code Processor   
Code Scheduler (pilot)   
Package Anything   
Code Summary

### Custom Cloud – Proven Real-Time Integration

Bulk Loader

### Custom Cloud – Real-Time Sandbox Environments

Sandbox to Production (beta)

### Custom Cloud – Real-Time Web Sites

High-Volume Portal Users  
Force.com Sites: Google Analytics Support

### Custom Cloud – Unlimited Real-Time Customization

Custom Settings   
Custom Help on Standard Fields   
Email Attachments  
Email Services Optimizer  
Lookup Filters (beta)



## Sales Cloud – Analytics

### **REAL-TIME QUOTES** *(Enterprise, Unlimited, and Developer Editions – Pilot)*

*Fulfill and close your deals with real-time quotes*

- :: Quickly and easily generate and manage sales quotes within Salesforce CRM

With Real-Time Quotes, your reps can now use Salesforce CRM to create sales quotes to complete the deal lifecycle. Real-Time Quotes automatically populates quotes with relevant customer data, so reps can generate and send a quote PDF with just a few clicks.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

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

### **DASHBOARD MICROSCOPE** *(All Editions)*

*Get detailed dashboard data quicker*

- :: Dig into the details of your charts...without the digging

With Dashboard Microscope, you can quickly get to the underlying data of your summarized dashboard charts. Drill down into any aspect of the summarized dashboard data—including categories, groupings, and individual data points—simply by clicking on it. Don't want to drill into a report? With Dashboard Microscope, you can hover over any chart type and a window will appear containing a summary of the underlying information. And for companies that want full visibility into their funnel, pie, and donut chart data—no matter how small—Dashboard Microscope lets you prevent small data points from being grouped into a larger "Other" category on a chart.

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

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

### **COLOR PICKER** *(All Editions)*

*Ensure your charts are clear and consistent*

- :: Control how charts represent data using color throughout your organization

With Color Picker, you can now select colors to represent specific entries in a picklist across your organization. For example, you can set "closed/won opportunities" to always appear as green on everyone's dashboard. This capability means your entire company can quickly identify what's happening in a chart based on color.

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

## **CHART MIXER** *(All Editions)*

*Combine two different chart types*

- :: Overlap two related charts on top of each other to get better insight on the problem

Chart Mixer merges two or more chart types into a single chart—for example, a chart with a line series and a chart with a column series. By combining two chart types that share an axis, you can discover new data relationships for even greater insight.

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[[Back to Index](#).]

## **Sales Cloud – Marketing & Leads**

## **CAMPAIGN SCOREBOARD** *(Developer, Enterprise, and Unlimited Editions)*

*Make effective campaign decisions quickly by viewing campaign information in one place*

- :: Create and view campaign results without leaving the campaign module
- :: See relevant information by tactic without sorting through irrelevant fields for that tactic

With the Campaign Scoreboard, marketing leaders gain quick access to pertinent information needed to evaluate marketing campaigns. With the newly created Campaign Summaries object, you can see the KPIs and other important results for your campaign without leaving the Campaign Tab. This approach lets you quickly determine the appropriate next steps in your marketing efforts. Plus, instead of sorting through Webinar stats by setting the Campaign Member Type to email, you now see only the relevant information for that email campaign. Together, these enhancements help improve your productivity, letting you intelligently report on the impact of your marketing activities.

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

[[Back to Index](#).]

## **CAMPAIGN ASSISTANT** *(Developer, Professional, Enterprise, and Unlimited Editions)*

*Streamline the execution of campaign activities and ensure your campaign data is accurate*

- :: Initiate campaign triggers, workflows, and validation rules at the time of data import or on gathering data via Web-to-lead
- :: Import up to 50,000 records into a campaign at one time
- :: Easily map data fields to align with custom campaign fields on import

With the Campaign Assistant, it's easier than ever to take advantage of campaign automation. Now, you can tie a triggered campaign to the time of data import. For example, say you create a promotional trade show follow-up email within salesforce.com. Using the Campaign Assistant, you can execute a triggered campaign when you import the leads, saving time and ensuring that campaign next steps are easy to execute. Plus, you can map data to custom fields within your personal salesforce.com application.

We've also tied this level of automation to the Web-to-lead feature. When a lead comes into the system, you can set up a triggered event at the time the new lead is created. This event could be an email to further enhance the prospect's knowledge of your solution, allowing you to nurture your leads automatically.

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

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

## Sales Cloud – Partners

### **SHARED ATTACHMENTS** *(Professional, Enterprise, and Unlimited Editions)*

*Share attachments with your partners in real time*

- :: Provide partners with real-time access to your documents
- :: Collaborate on documents for deals or cases

Now you can collaborate on documents with your partners using Shared Attachments. Once you've shared a record with a partner using Salesforce to Salesforce, you can now share any attachments on that record. Shared Attachments is perfect for collaborating on deal documents such as contracts or for sharing solutions to cases a partner may be working on your behalf.

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

### **PARTNER FINDER** *(Professional, Enterprise, and Unlimited Editions)*

*Discover which business partners use Salesforce CRM*

- :: Easily identify which business partners use Salesforce CRM
- :: Find connections and then start sharing information in real time

The Partner Finder lets you discover which of your business partners also uses Salesforce CRM. Send a mass survey to select contacts, and the recipients' responses are automatically logged on the contact record. Once you know who uses Salesforce CRM, you can invite them to connect with you and start sharing information in real time.

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

## Sales Cloud – Content

### **MOBILE CONTENT FOR IPHONE AND BLACKBERRY** *(Developer, Professional, Enterprise, and Unlimited Editions)*

*Get the content you want while on the go*

- :: Preview content directly from your mobile device

The new mobile content feature is like having a library of go-to documents right at your fingertips (or thumbs). With mobile content, iPhone and BlackBerry users can preview presentations, sales literature, and other documents right from the device, and then send these docs to prospects on the spot. Any document accessible through the content feature in Salesforce CRM can be made available on the mobile device.

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

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[[Back to Index](#).]

### **MOBILE CONNECTION VIA SSL** *(Developer, Professional, Enterprise, and Unlimited Editions)*

*Get connected via the most proven security protocol*

- :: Use SSL to connect to your mobile server

At salesforce.com, security is always a top priority, and mobile is no exception. With the Winter '10 release, Salesforce CRM's mobile feature now uses Secure Socket Layers (SSL)—the well-known industry-standard protocol—to establish a secure connection with the mobile server. Although previous versions of the mobile feature used government-class security to keep your data safe, the solution was proprietary. Adopting SSL means the information on your mobile device is now protected by a widely accepted and proven protocol.

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

[[Back to Index](#).]



## Service Cloud – Knowledge

### **KNOWLEDGE** *(Enterprise and Unlimited Editions)*

*Knowledge moves to the cloud with Force.com*

- :: Get the world's first enterprise-grade knowledge base on a true multitenant cloud platform

Salesforce.com's powerful knowledge base capabilities are used today by more than 300,000 agents globally. With Winter '10, this technology has been made available on the Force.com platform. Now, you not only get the benefits of our patented *dimensions* technology that helps deliver personalized knowledge to customers based on specific attributes, but you also get the full benefits of our cloud platform and cloud infrastructure: unlimited real-time customization, granular security, and real-time workflow. Plus, you get the trust and freedom that go along with our disaster recovery, proven reliability, and real-time upgrades. Knowledge is the world's first enterprise-grade knowledge base built on a true multitenant cloud platform.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

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

## Service Cloud – Social

### **SALESFORCE FOR TWITTER** *(Developer, Professional, Enterprise, and Unlimited Editions)*

*Join the real-time conversation in the fastest-growing social network*

:: Manage your customer conversations happening on Twitter while in salesforce.com

More than 30 million people are on Twitter every day, many potentially discussing your products and services. But are you part of the conversation? Now the Service Cloud lets you join in with Salesforce for Twitter. You can search for phrases or keywords, pull “tweets” into Salesforce CRM when you spot something relevant, or even let your customers create a case directly from Twitter. Your agents can respond from within Salesforce CRM using the same tools and business processes they do with other channels. Salesforce for Twitter is available as a free download from the AppExchange.

**Note:** Only available via the AppExchange.

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

## Service Cloud – Analytics

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

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[[Back to Index](#).]

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[[Back to Index](#).]

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[[Back to Index](#).]

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[ [Back to Index](#) ]

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[ [Back to Index](#) ]



## Custom Cloud – Programmable Cloud Logic

### **BATCH CODE PROCESSOR** *(All Editions)*

*Powerful batch asynchronous code processing*

- :: Deploy complex asynchronous processes
- :: Operate over entire data sets within one batch process

Have you ever wanted to build a process to validate all your account addresses? Or perhaps create a background process, iterating through millions of records, creating object relationships based on complex logic? The Batch Code Processor will release the power of asynchronous batch processing to customers, developers, and ISVs to build and deploy complex business processes, operating over entire data sets, leveraging the power and flexibility of salesforce.com's Force.com platform.

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

[ [Back to Index](#) ]

## **CODE SCHEDULER** *(Pilot)*

*Let Force.com schedule the work for you*

- :: Create complex Force.com code (Apex) execution schedules
- :: Monitor and edit schedules either programmatically or through the UI

Now, you can schedule your Apex processes with the Code Scheduler, so you can start data cleansing at times that are most convenient, for example. The Code Scheduler is a cron-like mechanism that lets you configure when your processes run so you don't have to run them manually.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

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

## **PACKAGE ANYTHING** *(All Editions)*

*Ensure your app always includes everything it needs from standard objects*

- :: Improve the out-of-the-box trial experience for your customers
- :: Reduce the number of post-install steps for your customers
- :: Package standard objects the same as custom objects—with all components included

With Winter '10, you can include record types, page layouts, list views, and validation rules in packages on standard objects. Plus, you can ensure customers get everything they need with an install or upgrade with an improved profile mapping during the install process.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

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

## **CODE SUMMARY** *(Free, Enterprise, Unlimited, and Developer Editions)*

*Quickly view a summary of your code*

- :: Easily understand what's in a class
- :: View code as a specific package version

Winter '10 makes developers instantly organized with Code Summary. Developers can see all class variables and methods in a single, easy-to-use summary view. Developers and customers can determine in which package versions a specific variable or method is available—information that's extremely useful when calling that class.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

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

## **Custom Cloud – Proven Real-Time Integration**

## **BULK LOADER** *(Free, Enterprise, Unlimited, and Developer Editions)*

*Fast and scalable data loading*

- :: Improve throughput on large data sets
- :: Increase stability, monitoring, and control of high-volume data loads
- :: Allow better control and optimization of data center resources during data loads

Winter '10 brings true scalability to the cloud with the Bulk Loader. No other cloud-computing provider comes close to delivering the same data load capabilities. It takes longer to count the records being loaded than to actually load them!

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

[ [Back to Index](#) ]

## Custom Cloud – Real-Time Sandbox Environments

### **SANDBOX TO PRODUCTION** *(Beta)*

*Move changes and apps with just a few clicks*

- :: Let non-technical admins deploy changes between environments
- :: Eliminate the need for IDE-based deployments
- :: Decrease deployment efforts

Sandboxes are critical for large and midsize customers to develop and test configuration changes without impacting end users on production. Winter '10 introduces Sandbox to Production, which lets a non-technical admin or business analyst copy supported types of changes between sandbox and production organizations, or between sandboxes, right within the app. No more downloading Eclipse or relying on highly technical people. Sandbox to Production lets every admin move changes, apps, and configurations with a few clicks inside salesforce.com.

**Note:** Please contact Salesforce.com Support to have this feature enabled.

[ [Back to Index](#) ]

## Custom Cloud – Real-Time Web Sites

### **HIGH-VOLUME PORTAL USERS** *(Free, Enterprise, and Unlimited Editions)*

*Scale your customer portal to millions of users*

- :: Authenticate public visitors

Sites continues to improve in Winter '10 by adding support for light customer portal users, letting your site scale to millions of authenticated users for your public sites.

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

[ [Back to Index](#) ]

### **FORCE.COM SITES: GOOGLE ANALYTICS SUPPORT** *(Free, Enterprise, and Unlimited Editions)*

*Use Google to track your site*

- :: Best-of-breed solution for Web analytics
- :: Easily configure Google Analytics without code

Tracking the performance of your site has never been easier. With Winter '10, you can use Google Analytics natively to track all your Web site stats.

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

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

## Custom Cloud – Unlimited Real-Time Customization

### **CUSTOM SETTINGS** *(All Editions)*

*Customize the behavior of your application based on who you are*

- :: Provide advanced application personalization and customization
- :: Deliver efficient cached data access

Custom Settings provides two distinct mechanisms for application metadata: app level and org / profile / user level settings. Both mechanisms will expose the data within the application cache, providing efficient access to these objects without the cost of a query to the system.

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

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

### **CUSTOM HELP ON STANDARD FIELDS** *(All Editions)*

*Make your app easier to use*

- :: Increase end-user adoption
- :: Decrease the learning curve of your app for end users

Winter '10 extends the Custom Help on Custom Fields functionality to Standard Fields. With Custom Help on Standard Fields, administrators can include custom instructions for their end users, reducing training time and improving end-user productivity.

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

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

### **EMAIL ATTACHMENTS** *(All Editions)*

*Easily configure your attachment types*

- :: Full control over outbound emails

Winter '10 lets you set the content type of an attachment and make it inline in the email. For example, now you attach meeting invites for recipients to accept or decline directly from the email.

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

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

### **EMAIL SERVICES OPTIMIZER** *(Free, Developer, Enterprise, and Unlimited Editions)*

*Control the email experience*

- :: Improve the customer email experience
- :: Eliminate unnecessary data storage

Winter '10 offers big improvements in email capabilities. The service now ensures that customers receiving emails from Apex will have a good experience by elegantly handling exceptions and letting you

control the experience. In addition, you can now choose to truncate any content above the 100kb limit on inbound emails.

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

[ [Back to Index](#).]

## **LOOKUP FILTERS** *(All Editions – Beta)*

*Easily find relevant choices*

- :: Improve user productivity
- :: Ensure data quality

With Lookup Filters, administrators can configure the dialog results and values for a lookup field to filter irrelevant choices. The choices for users are filtered based on predefined criteria. For example, one option might be to only allow accounts with record type of “Customer” to be selected for an account name lookup on an opportunity, filtering out partners and competitors.

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

[ [Back to Index](#).]