

# Dream Big With Winter '09

Over 50 new features ... and more to come with Dreamforce!



• = Salesforce.com Community most requested features

## Powerful Tools for Developers

Build your dream applications faster with Force.com, now more powerful than ever. It's easy to code, test, and deploy enterprise-class applications in the cloud with the Force.com IDE and with powerful enhancements to Apex code and Visualforce.



### User Interface as a Service

#### Visualforce

- Visualforce Email Templates •
- Packaging for Visualforce •
- Visualforce List Controllers
- Visualforce Dynamic Templates
- Visualforce Enhanced List Component
- Visualforce Custom Buttons •
- Visualforce Input File Component
- Visualforce Mobile Generally Available

#### User Experience

- Custom Application Messages •
- Offline Custom Objects and Tabs
- Force.com Connect for Outlook and Lotus Notes Enhancements

### Logic as a Service

#### Apex

- Dynamic Apex Generally Available •
- Asynchronous Apex Code
- Advanced SOQL Joins •
- Cross-Object Formulas for Self-Relationships •
- User-Specific Apex Tests

#### Workflow

- Approval Workflow Recall Actions
- Workflow & Activities on Many-to-Many Objects

### Database as a Service

- Schedule and Email Reports •
- Improved Storage Management •

### Integration as a Service

- Tagging API •
- Metadata API for Analytics

### Development as a Service

- Force.com IDE Generally Available •
- Developer Sandbox
- Force.com Migration Toolkit

### Global, Trusted, Secure Infrastructure

- SAML 2.0

### Application Exchange

- Packaging for Visualforce •
- Advanced Managed Package Flexibility

## Dream Apps for User Success

Inspire your customers to dream big with Salesforce Ideas and get your employees working on the same page with Salesforce CRM Content for Google Docs. With Winter '09, user, customer, and partner success has never been easier.



### Salesforce CRM for Google Apps

- Salesforce CRM Content for Google Docs •
- Office Files to Google Docs •
- Gmail to Opportunity •

### Salesforce CRM Content

- Salesforce CRM Content for Google Docs •
- Opportunity Reporting

### Salesforce CRM Ideas

- Visualforce for Salesforce CRM Ideas •
- Merging Duplicate Ideas and Status Tags •
- My Profile Page and Rich Text Editing •

### Salesforce CRM SFA

- Opportunity Splitting •
- Approval Workflow Recall Actions
- Click-and-Create Events
- Drag-and-Drop Scheduler
- Schedule and Email Reports

### Salesforce CRM Marketing

- Campaign Influence •

### Salesforce CRM Call Center

- Workflow from Case Comments •
- Case Teams •
- Entitlements

### Salesforce CRM Partner Networks

- Salesforce CRM Mobile for Partners •
- Calendar and Events for Partners •
- HTML Messages for Partner Portal

### Salesforce to Salesforce

- Mass Share Records •
- Mass Invite •
- Related List Sharing •
- Share Lookup References

### Salesforce CRM Mobile

- Salesforce CRM Mobile for iPhone: Edit •
- Visualforce Mobile Generally Available
- Dashboards for Mobile •
- Mobile PIN Login Security
- Enhanced Mobile Data Controls and Tab Management

## User Interface as a Service

### **VISUALFORCE EMAIL TEMPLATES** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Create Rich Email Templates*

- :: Build dynamic email templates with conditions
- :: Pull information from anywhere within your application
- :: Create documents and attach them to emails

When Visualforce was released in Summer '08, it provided unprecedented power and flexibility to customize the Salesforce CRM user interface to meet the needs of any application. Now, in Winter '09, that same power and flexibility is available to create richly formatted email templates.

Using the same HTML-like tags and Apex controller concepts as Visualforce pages, developers can create email templates that display information from multiple objects, with precision control over format and styling. For example, you can create a sales quote email template to send to a prospect that includes information from the opportunity object, but also from opportunity line items as well as warranty information about each product. Plus, you can dynamically create personalized PDF or text documents and deliver them via email.

Apex controller logic lets you dynamically change the content and formatting of email templates based on rules you define. Want to highlight certain fields or display additional information based on the status of a case or the number of days it has been open? Visualforce email templates give you the power to do so.

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

[[Back to Index](#).]

### **PACKAGING FOR VISUALFORCE** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Package Your Favorite Visualforce User Interfaces via the Force.com AppExchange*

- :: Install or package AppExchange applications with custom Visualforce UIs
- :: Expand the functionality of your AppExchange applications with Visualforce pages
- :: Maximize customization by sharing elements of your applications as components
- :: Broaden the reach of your Web service by creating and distributing custom components

Winter '09 introduces the ability to distribute Visualforce pages and components through the AppExchange. ISVs and developers can now publish and distribute their pages and component libraries through the AppExchange. Customers will now be able to install applications with advanced custom UIs that leverage Visualforce functionality.

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

[[Back to Index](#).]

### **VISUALFORCE LIST CONTROLLERS** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Tailor the User Experience by Including Lists in your Visualforce Page*

In Summer '08, Visualforce made it easy to override standard detail and edit pages with a highly tailored user experience. Standard and custom controllers make it easy to populate that user experience with data associated with a particular record ID.

With Winter '09, Visualforce List Controllers provides that same easy process to create highly tailored, list-oriented user experiences that represent sets of records. Visualforce List Controllers includes the following functionality:

- Override a List View page and get the native filter from a predefined view
- Include pagination and mass actions with a single line of code
- Pass filters into the list page using any SOQL statement with object relationships up to five deep
- Make any page aware of list filter definitions to scope data
- Perform edit operations on multiple records
- Support for custom list buttons (see Visualforce Custom List Buttons below)
- Extend with Apex to leverage any SOQL

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

[[Back to Index.](#)]

## **VISUALFORCE DYNAMIC TEMPLATES** *(Enterprise, Unlimited, and Developer Editions)*

*Dynamically Choose a Template for a Visualforce Page*

- :: Simplify coding of Visualforce pages
- :: Improve consistency of custom UIs
- :: Provide conditional structure and styles for differing user groups

Templates are a powerful way to share common page elements, structure, and styles across many Visualforce pages. Now, you can not only define a template in a Visualforce page, but dynamically choose a template, too. With Visualforce Dynamic Templates, you can define the look-and-feel of the portal pages in a Visualforce template and have the flexibility to point to different templates based on customer level: Platinum, Gold, or Silver.

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

[[Back to Index.](#)]

## **VISUALFORCE ENHANCED LIST COMPONENT** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Put an Enhanced List on a Visualforce Page*

- :: Allow users to quickly customize, manage, and edit lists of records

The Enhanced List feature released in Summer '08 is now available as a standard Visualforce component. Enhanced List Component allows users to manage list view data much easier with drag-and-drop customization, inline editing capabilities (if enabled in the organization), and powerful navigation options to work through large sets of records.

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

[[Back to Index.](#)]

## **VISUALFORCE CUSTOM BUTTONS** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Minimize your Development Time by Connecting Custom Buttons to a Visualforce Page*

- :: Minimize your development time by creating Visualforce custom buttons
- :: Easily create your own mass actions with Custom Buttons for list pages

With Visualforce Custom Buttons, you can now connect a custom button to a Visualforce page in addition to connecting it to a URL, S-control, or onClick JavaScript.

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

[[Back to Index.](#)]

## **VISUALFORCE INPUT FILE COMPONENT** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Use a Standard Visualforce Controller to Upload a File*

- :: Leverage an out-of-the-box controller to upload files

With Visualforce Input File Component, developers can now use a standard controller instead of coding their own when they need a Visualforce page to accept a file attachment.

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

[[Back to Index.](#)]

## **VISUALFORCE MOBILE GENERALLY AVAILABLE** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)*

*Get Visualforce Functionality on Mobile Devices*

- :: Make Visualforce features available on mobile devices via Web pages accessed through a wireless connection
- :: Deliver a “hybrid” mobile experience, combining reliable local client functionality with the broad capabilities of the Web
- :: Let administrators pull together select Visualforce elements or fields from various objects into a single screen that is optimized for mobile viewing

Visualforce Mobile fills the gap between the limitations of the current “object-only” mobile client technology and the near-limitless features of the Salesforce CRM desktop application.

The new tab functionality merges a client application’s performance with the Web’s flexibility to create a true “hybrid” mobile experience. Using a mobile browser, administrators can mobile enable tabs and other features previously available only on the desktop version of Salesforce CRM. This capability greatly extends the customizability of the Salesforce CRM Mobile service.

By creating a Visualforce page and mobilizing it, administrators can create any kind of form or wizard and make it instantly available as a tab in the mobile application. Administrators can also take advantage of specific features available on mobile Web browsers.

As wireless network coverage broadens and data capacity improves, Salesforce CRM Mobile will be redeveloped to more fully leverage the mobile Web. BlackBerry is the first platform to support this new capability, with other mobile platforms to follow.

**Note:** Generally available, but not automatically visible. Feature is enabled, but requires some setup and users must upgrade to the latest version of the Salesforce CRM Mobile client for BlackBerry.

[[Back to Index.](#)]

## **CUSTOM APPLICATION MESSAGES** *(Professional, Enterprise, Unlimited, and Developer Editions)*

*Tailor and Localize Application Messages*

- :: Display messages in the user’s preferred language
- :: Tailor messages in third-party applications

With Custom Application Messages, it is easier than ever for developers, ISVs, and administrators to create easy-to-use, multilingual apps that run on the Force.com platform. Customer Application Messages in the form of page text, help information, or error messages can be used in Visualforce pages, Apex, and formula fields. They are automatically displayed to end users in their preferred language.

For example, an administrator who installs a third-party Force.com AppExchange application can change an error message to direct users to a toll-free support number. Or, a developer can display a welcome message on a Visualforce page based on the user's language setting, without writing language display logic or putting labels inside code.

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

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

## **OFFLINE CUSTOM OBJECTS AND TABS** *(Enterprise, Unlimited, and Developer Editions)*

*Find and Review Critical Account Information Offline*

- :: Access Custom Objects and Tabs Offline
- :: Update your briefcase contacts (new leads, new opportunities, account updates) offline using the new Admin Console

With Force.com Offline Custom Objects and Tabs, users can access their most critical data while disconnected from the Internet. Use the new Offline Admin Console for fine-grain control of the Offline Briefcase and other standard custom offline objects. Custom objects are now available offline on their own tabs with *all* related lists (previously, only custom objects with master-detail relationships to offline standard objects were supported).

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

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

## **FORCE.COM CONNECT FOR OUTLOOK AND LOTUS NOTES ENHANCEMENTS**

*(Personal, Group, Enterprise, and Unlimited Editions)*

*Get Better Desktop Integration*

- :: Improve usability of the Contact Association feature
- :: Improve performance

To make new users more successful and improve existing users' productivity, salesforce.com is focusing on the most common user tasks to boost user productivity. This effort includes more efficient use of the Force.com Web Services API during login, resulting in a more responsive application. Users will experience improved startup times and be able to add emails and associate records more quickly.

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

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

## **Logic as a Service**

## **DYNAMIC APEX GENERALLY AVAILABLE** *(Professional, Enterprise, Unlimited, and Developer Editions)*

*Get Dynamic and Flexible Programming with Apex Code*

- :: Retrieve and evaluate application customizations
- :: Inspect and programmatically enforce user permissions

When you develop CRM extensions and custom applications, flexible operations that support the dynamic nature of end-user interactions can be an advantage. For example, you may want to implement a Visualforce page that shows different information based on user-level access and dynamically enforces application permissions. With Dynamic Apex, you can build generic and flexible processes that employ Describe methods to dynamically inspect end-user permissions as well as generate dynamic SOQL, SOSL, and DML statements, providing highly flexible runtime behavior.

- **Leverage customizations**  
Incorporate and deploy customizations with familiar Describe classes.
- **Incorporate user permission awareness**  
Get the power of system-level access and enforce user permissions and constraints where desired.
- **Flexible programming**  
Interpret runtime behavior with Dynamic classes and methods, providing highly flexible and efficient processing logic.

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

[[Back to Index.](#)]

## **ASYNCHRONOUS APEX CODE** *(Professional, Enterprise, Unlimited, and Developer Editions)*

*Get Asynchronous Processing with Apex Code*

- :: Execute customer business logic asynchronously
- :: Monitor the execution status of asynchronous Apex code

This feature brings the power and flexibility of asynchronous processing to the Force.com platform. By annotating Apex methods, developers can instruct the Apex runtime to execute methods asynchronously, decoupling processing logic from directly impacting end-user performance. This framework provides more flexibility when developing custom business logic and simplifies certain use cases, such as the execution of Apex code from Apex triggers.

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

[[Back to Index.](#)]

## **ADVANCED SOQL JOINS** *(Enterprise, Unlimited, and Developer Editions)*

*Increase Flexibility when Querying*

- :: Perform advanced queries without exporting data into an external database
- :: Simplify code written to emulate semi- and anti joins

With support for semi- and anti joins, SOQL will become more powerful, allowing users to write more expressive queries.

- **Semi joins**  
You can express WHERE conditions that depend on the result of child queries. You can also create joins based on polymorphic keys and perform joins if there is not a predefined relationship based on ID fields. Plus, you can perform arbitrary joins between objects, such as joins based on non-ID fields.
- **Anti joins**  
With anti joins, you can express conditions in which something is false. For example, an anti join could be used to return all job positions for which there is *no* related candidate record.

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

[[Back to Index.](#)]

## **CROSS-OBJECT FORMULAS FOR SELF-RELATIONSHIPS** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Empower Administrators to Do More without Code*

- :: Define calculations or business logic based on Parent Account, Parent Case, etc.
- :: Display a user's management chain without writing Visualforce or Apex code

With Winter '09, salesforce.com makes cross-object formulas even more powerful by supporting self-relationships.

For example, a sales rep trying to determine an account's chain of command can now see a contact manager's name, title, phone number, and email on a Contact record or Contact report.

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

[[Back to Index.](#)]

## **USER-SPECIFIC APEX TESTS** *(Professional, Enterprise, Unlimited, and Developer Editions)*

*Run Tests in Apex as "Any" User*

- :: Improve application test coverage
- :: Improve application quality

With Winter '09, developers can explicitly set the running user context within their test execution. This feature gives developers the ability to programmatically create users as well as test and validate the corresponding user-specific sharing rules and scenarios. It also offers greater flexibility within test execution, providing simplified and expanded code coverage.

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

[[Back to Index.](#)]

## **APPROVAL WORKFLOW RECALL ACTIONS** *(Enterprise, Unlimited, and Developer Editions)*

*Improve Control and Flexibility for Users and Administrators*

- :: Enable users to recall and resubmit requests without administrator intervention
- :: Improve an administrator's control over what happens when a record is recalled

With Approval Workflow Recall Actions, you can take actions whenever an approval request is recalled. Recall Actions also makes it possible for the submitter to edit a Force.com record and resubmit it for approval, without the administrator "resetting" the record for resubmission. You can use Approval Workflow Recall Actions to reverse any field updates performed in the approval process or notify key people in the organization whenever a record is recalled.

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

[[Back to Index.](#)]

## **WORKFLOW & ACTIVITIES ON MANY-TO-MANY OBJECTS** *(Enterprise, Unlimited, and Developer Editions)*

*Combine Flexible Data Modeling with the Efficiencies of Business Process Automation*

- :: Perform workflow actions when a relationship is created between records
- :: Track tasks and events that are associated with the relationship between records

When Many-to-Many Object Relationships was released in Summer '08, it became possible to relate records from one object with multiple records of another object, and vice versa. Now, with Winter '09, you can associate activities and trigger workflow actions whenever such a relationship is created or modified.

Consider a recruiting application where there are many applicants, each of whom can be related to one or more job postings, and vice versa. With Winter '09, whenever an applicant applies for a new job posting, you can trigger workflow actions such as email notifications and follow-up tasks for the recruiter and hiring manager.

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

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

## Database as a Service

### **SCHEDULE AND EMAIL REPORTS** *(Professional, Enterprise, Unlimited, and Developer Editions)*

*Get Your Most Important Reports via Email, When You Want Them*

- :: Push reports directly to users
- :: Eliminate the need for users to log into Salesforce CRM

With Schedule and Email Reports, you can set up a schedule and mail reports to any user with the appropriate permissions. For example, marketing managers could receive the status of their campaigns in a summary report every Friday.

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

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

### **IMPROVED STORAGE MANAGEMENT** *(All Editions, varies by Edition)*

*Drive Higher Adoption and Use of Documents, Notes, Attachments, and Salesforce CRM Content*

- :: Leverage separate storage allocations for files and data
- :: Improve reporting on file and data storage consumption
- :: Get detailed reports on top consumers of file and data storage

With Improved Storage Management, you can manage data and file storage separately to help use your storage allocations more effectively. This feature helps drive adoption of notes, attachments, documents, and Salesforce CRM Content.

- **Separate file and data storage**  
Instead of a general storage allowance, each Salesforce org now has separate storage allocations for data (i.e., Salesforce records) and files (notes, attachments, documents, and materials in Salesforce CRM Content). You can also buy separate blocks of add-on storage for records versus files. If you previously purchased general add-on storage, it will be upgraded with additional data and file storage allowances.
- **Increased file storage allowances**  
Previously, the 20Mb of storage customers received (120Mb for Unlimited Edition customers) was used for storing both data records and files. To meet customer demand for storing more files within Salesforce CRM, we are introducing an additional “file-only” storage quota at no additional cost. Each customer will receive an additional 100Mb of file-only storage to store attachments, notes, documents, and files in Salesforce CRM Content.
- **Summary file and data storage reporting**  
Salesforce.com now provides summary-level reporting on file and data storage consumption, so you can manage both allocations more effectively.
- **User and file-level detail storage reporting**  
In addition to summary-level reports, you can now see which individual users and specific files are consuming the largest portion of your storage allowance.

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

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

## Integration as a Service

### **TAGGING API** (*Enterprise, Unlimited, and Developer Editions*)

*Manage Tags Programmatically*

- :: Access and manipulate tag data via the Force.com Web Services API
- :: Access tag functions not available via the UI

With Winter '09, we've added even more functionality to our tagging features to support tags on dashboards and to manage the plethora of tags. With API support, you can now programmatically manage tags.

- **API tagging**  
Create your own custom tagging features with access to tag data and functions via the API. Add and change tag data via the API, automatically tag data from integrations, and create custom buttons and Apex triggers that assign tags to data. You can also add custom pages that display data, using tags to determine which records will be listed.
- **Tags on dashboards**  
With Winter '09, you can add public and personal tags to dashboards for fast, intuitive navigation. Keep business-critical dashboard data at your fingertips by adding personal tags to those dashboards *you* care about most. Organize dashboards using public tags to give executives easy access.

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

[[Back to Index.](#)]

### **METADATA API FOR ANALYTICS** (*Enterprise, Unlimited, and Developer Editions*)

*Manage Analytics Programmatically via the Force.com Web Services API*

- :: Move reports between environments
- :: Audit report changes
- :: Mass edit/create/delete reports, CRTs, and dashboards

With Winter '09, the Force.com Metadata API supports reports, dashboards, and custom report types.

- **Reports**  
You can package a set of reports, move it, or change a set of reports by changing the filter criteria or the filtered fields. The Report Metadata API lets you create, edit, and delete reports through the API just as you would with any other objects.
- **Dashboards**  
You can mass create, mass change, and mass delete dashboards and dashboard parameters.
- **Custom report types**  
You can modify report types, set them up automatically, or remove unused report types, including all related reports and dashboards.

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

[[Back to Index.](#)]

## Development as a Service

### **FORCE.COM IDE GENERALLY AVAILABLE** (*Enterprise, Unlimited, and Developer Editions*)

*Build any Application on a Full-Featured, Integrated Development Environment for the Force.com Platform*

- :: Develop in a collaborative development environment

- :: Migrate configuration data between Salesforce CRM instances
- :: Support all new Metadata API types
- :: Get granular control of a project

The Force.com IDE is an Eclipse-based development tool for professional developers building Force.com native applications. It provides a rich coding environment for creating Apex and Visualforce, XML-based editing of metadata components, and integrated tools for testing, versioning, and deploying applications across environments.

As of Winter '09, the Force.com IDE is generally available. It can be downloaded at no charge from the [developer.force.com](http://developer.force.com) site.

- **Apex code**  
The Force.com IDE is the only tool you need to write and manage Apex classes and triggers. It locates syntax errors and displays inline auto-complete tips for Apex code methods. The Test Runner executes unit tests, links error messages to code, and displays debugs output and code coverage reports.
- **Visualforce**  
Edit Visualforce pages, components, static resources, and controllers
- **S-controls**  
Develop S-controls quickly with HTML syntax highlighting and merge field browser.
- **Configuration metadata**  
Download all metadata components in the Metadata API into your Force.com project, including custom fields, custom objects, layouts, applications, profiles, and more. Edit these components directly in the IDE, create new ones, and save them back to your Salesforce org.
- **Deployment**  
Edit and test your project in a Force.com Sandbox or Developer Edition org, then deploy the finished application into your production org. Projects are interoperable with the Force.com Migration Tool.
- **Code Share**  
Apply Force.com application lifecycle management best practices by integrating any Eclipse-enabled version control system. Teams can collaborate on the development, testing, and deployment of their platform-as-a-service (PaaS) applications.
- **Online Project Mode**  
Keep your local metadata files up to date with your Salesforce org to detect and resolve conflicting changes.
- **Schema Browser**  
View your Salesforce org's schema and construct and execute SOQL queries from within the Force.com IDE. Similar to Apex Explorer, Schema Browser shows information about all standard and custom objects and fields.

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

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

## **DEVELOPER SANDBOX** *(Enterprise and Unlimited Editions)*

*Harness the Power of Sandbox for All Your Developers*

- :: Reduce development complexity
- :: Accelerate development efforts

Developer Sandboxes provide simpler and more flexible sandbox management and increase developer productivity. Developer Sandbox is a configuration-only sandbox, with the capacity to manually load up to 10MB of data (about 3,000 records). Customers have told us they want individual developers to have their own sandbox copies of production environments to develop their projects. To meet this need, all Unlimited Edition orgs (including existing customer orgs) now include 15 Developer Sandboxes. Additional Developer Sandboxes will be included with purchases of full and configuration-only sandboxes in both Unlimited Edition and Enterprise Edition. (Developer Sandboxes can be created and refreshed in the same way as configuration-only and full sandboxes.)

Note that Developer Sandbox replaces Apex Sandbox and has identical features and functionality. Existing Apex Sandboxes are now called Developer Sandboxes.

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

[ [Back to Index.](#) ]

## **FORCE.COM MIGRATION TOOLKIT** *(Enterprise, Unlimited, and Developer Editions)*

*Promote Your Code and Configurations with Ease*

- :: Work with setup configuration as XML metadata files
- :: Migrate configuration changes between orgs
- :: Create tools for managing org and application metadata

The Force.com Migration Toolkit is a Java/Ant-based command-line utility for moving metadata between a local directory and a Force.com org. The Force.com Migration Toolkit is especially useful in the following scenarios:

- **Multistage release processes**  
A typical development process requires iterative building, testing, and staging before releasing to a production environment. Scripted retrieval and deployment of components can make this process much more efficient.
- **Repeat deployments easily**  
Perform a scripted deployment to a staging environment to verify your changes and deployment process, and then repeat the same script for a reliable deployment into production.
- **Automate complex scripts that include setup migration**  
If you have a repetitive process that includes retrieval and deployment of organization setup, you can automate the sequence to reduce effort and increase reliability.

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

[ [Back to Index.](#) ]

## **Global, Trusted, Secure Infrastructure**

### **SAML 2.0** *(Personal, Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Use Easy, Secure Single Sign-On*

- :: Improve the user experience with single sign-on across the enterprise
- :: Centralize user management in a single system

With Winter '09, you can use the OASIS Security Assertion Markup Language (SAML) standard to provide single sign-on system access. This feature lets customers that invested in SAML implement single sign-on to Salesforce CRM easily and cost-effectively. Unlike with delegated authentication, customers do not have to deploy Salesforce-specific software to use SAML. Also, SAML never sends passwords to Salesforce, so it is inherently more secure than other authentication mechanisms.

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

[ [Back to Index.](#) ]

## **Application Exchange**

### **PACKAGING FOR VISUALFORCE** *(Group, Professional, Enterprise, Unlimited, and Developer Editions)*

*Package Your Favorite Visualforce User Interfaces via the Force.com AppExchange*

- :: Install AppExchange applications with custom Visualforce UIs

- :: Expand the functionality of your AppExchange applications with Visualforce pages
- :: Break down and share elements of your applications as components for maximum customization
- :: Broaden the reach of your Web service by creating and distributing custom components

Winter '09 introduces the ability to distribute Visualforce pages and components through the AppExchange. ISVs and developers can now publish and distribute their pages and component libraries through the AppExchange marketplace. Customers will now be able to install applications with advanced custom UIs that leverage Visualforce functionality.

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

[[Back to Index](#).]

## **ADVANCED MANAGED PACKAGE FLEXIBILITY** *(Developer Edition)*

*More Flexibility for Developers to work with Managed Packages*

- :: Save time by updating instead of creating a new package

With Winter '09, we've increased the flexibility of managed packages to allow developers to further enhance their application in future versions. The following features can now be updated after the initial release:

- Enable reports and activities on previously released objects
- Upgrade custom reports types
- Update the Label field for many components after release
- Edit subscriber-controlled fields after release

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

[[Back to Index](#).]

**SALESFORCE CRM CONTENT FOR GOOGLE DOCS** *(Professional, Enterprise, and Unlimited Editions)*

*Collaborate with Partners and Customers by Managing Your Google Docs in Salesforce CRM Content*

- :: Use Salesforce CRM Content to share documents in Google Apps
- :: Create Google documents, spreadsheets, and presentations in Salesforce CRM Content
- :: Provide a single place for users to find all relevant materials and track content use

Effective collaboration is much easier when you don't have to deal with oversized email attachments, install new versions of office productivity software, and search through endless folders to find the files you need. With the integration of Salesforce CRM Content and Google Docs, you can handle the entire process of creating, sharing, and getting feedback on documents entirely on the Web. This approach saves time, improves team collaboration, and makes you more effective.

- **Publish documents created in Google Apps in Salesforce CRM Content**  
Use Salesforce CRM Content to quickly share content you created with colleagues in Google Apps. Provide one central location for finding all content, regardless of where it was created.
- **Create new documents in Google Apps directly from Salesforce CRM Content**  
Save time by creating new materials in Google Apps from within Salesforce CRM Content.
- **Track use and get feedback from peers**  
Understand which Google Apps documents are most valuable by tracking use and reviewing votes and comments from end users.

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

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

**OFFICE FILES TO GOOGLE DOCS** *(All Editions)*

*Collaborate in the Cloud by Converting Office Files to Google Docs*

- :: Create Google Docs instantly within Salesforce CRM by converting existing Microsoft Office files
- :: Eliminate file attachments and versioning

With Winter '09, it's easier than ever to collaborate in the cloud by creating new Google Docs within Salesforce CRM from existing Microsoft Office files. For example, when creating a new presentation for a sales opportunity, you can create a Google presentation by uploading and converting an existing Microsoft PowerPoint file from your desktop. Salesforce CRM supports all major file types, including Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Rich Text Format, and more.

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

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

**GMAIL TO OPPORTUNITY** *(All Editions)*

*Sell More Effectively with Seamless Gmail Integration*

- :: Drive visibility by viewing sales team activity
- :: Associate activities with leads, contacts, and opportunities

With Gmail-to-Salesforce integration in Summer '08, you could tie an activity to a lead or a contact. With Winter '09, salesforce.com extends that functionality to include opportunities, making it easier than ever to get an overview of the sales team's activities. In addition, you can attach an activity to any standard or custom object by including the record ID in the subject line or body of your email.

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

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

## Salesforce CRM Content

### **SALESFORCE CRM CONTENT FOR GOOGLE DOCS** *(Professional, Enterprise, and Unlimited Editions)*

*Collaborate with Partners and Customers by Managing Your Google Docs in Salesforce CRM Content*

- :: Use Salesforce CRM Content to share documents in Google Apps
- :: Create Google documents, spreadsheets, and presentations in Salesforce CRM Content
- :: Provide a single place for users to find all relevant materials and track content use

Effective collaboration is much easier when you don't have to deal with oversized email attachments, install new versions of office productivity software, and search through endless folders to find the files you need. With the integration of Salesforce CRM Content and Google Docs, you can handle the entire process of creating, sharing, and getting feedback on documents entirely over the Web. This approach saves time, improves team collaboration, and makes you more effective.

- **Publish documents created in Google Apps in Salesforce CRM Content**  
Use Salesforce CRM Content to quickly share content you created in Google Apps with groups of colleagues. Provide one central location for finding all content, regardless of where it was created.
- **Create new documents in Google Apps directly from Salesforce CRM Content**  
Save time by creating new materials in Google Apps from within Salesforce CRM Content.
- **Track use and get feedback from peers**  
Understand which Google Apps documents are most valuable by tracking use and reviewing votes and comments from end users.

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

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

### **OPPORTUNITY REPORTING** *(Professional, Enterprise, and Unlimited Editions)*

*See Which Materials Are Most Helpful in Closing Deals*

- :: View reports that detail content use relative to Opportunities, Accounts, and other objects
- :: Customize reports to identify the most effective content in certain types of deals

Which sales presentations and product collateral are most effective in winning new customers? With Opportunity Reporting, you get visibility into which materials are driving sales.

- **Custom Salesforce CRM Content – Opportunity reports**  
Create custom reports that show which materials were attached to Opportunities against particular competitors or for particular products. Measure the true ROI on content development by understanding what deals were influenced by key materials.
- **Custom reports on Salesforce CRM Content and other Salesforce objects**  
See which materials are related most often to Accounts, Contacts, and other select objects in Salesforce CRM.

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

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

## Salesforce CRM Ideas

### **VISUALFORCE FOR SALESFORCE CRM IDEAS** *(Enterprise and Unlimited Editions)*

*Pixel-Level Control to Match the Exact Look-and-Feel of Your Web Site*

- :: Take complete control over the user experience
- :: Modify the CSS and markup and extend Salesforce CRM Ideas with your own custom controllers

Leveraging the power of the Force.com platform, Visualforce for Salesforce CRM Ideas gives you pixel-level control over the Salesforce CRM Ideas application so you can customize the user experience to your exact specifications. With Visualforce for Salesforce CRM Ideas comes a complete set of templates that make up the Salesforce CRM Ideas application. You now have full control over these pages so you can modify the CSS, HTML, and even dig into the controllers themselves.

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

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

### **MERGING DUPLICATE IDEAS AND STATUS TAGS** *(Enterprise, Professional, and Unlimited Editions)*

*Maintain High Data Quality and Scale Your Community through Enhanced Management Features*

- :: Automate moderation activities such as merging duplicates and blocking inappropriate language
- :: Show the community you are listening by providing timely updates on top ideas
- :: Highlight the active participation of subject matter experts in the community

As communities and activity volume grow over time, streamlined community management becomes increasingly important. The Winter '09 release significantly enhances the community management experience with new features:

- **Merging Duplicate Ideas**  
This feature lets community managers merge duplicate postings with a few clicks.
- **Suggested Duplicates and Validation Rules on Comments**  
These features provide preventive measures for duplicate postings and inappropriate language.
- **Expert Icon**  
This icon highlights the participation of community experts.
- **Status Tags**  
These tags provide a powerful way to loop back with the community on top ideas.
- **Delete Voting**  
This feature lets community managers delete erroneous votes.

**Note:** Automatically visible to all users. No setup required. The Suggested Duplicates feature is only available with Visualforce pages.

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

### **MY PROFILE PAGE AND RICH TEXT EDITING** *(Enterprise, Professional, and Unlimited Editions)*

*Empower Your Community by Providing a Richer, Personalized Experience*

- :: Raise the profile of community members through individual pages
- :: Give users the ability to post ideas exactly as envisioned through rich text editing capabilities

The Winter '09 release includes exciting new features that deepen the end user's engagement in the community:

- **My Profile Page**  
This feature provides a single view into each community member's activities, including submitted ideas, comments, and votes.
- **Rich Text on Ideas**  
This feature includes the ability to post hyperlinks so end users can express their ideas in more compelling ways.
- **Community Nicknames**  
This feature lets each end user choose a nickname for a community.
- **Down Voting**  
This feature lets end users actively demote ideas.
- **Multiple Categories**  
These categories make it possible to tag an idea with multiple communities, thereby ensuring a richer dialogue around the idea.

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

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

## Salesforce CRM SFA

### **OPPORTUNITY SPLITTING** *(Pilot – Developer, Unlimited, and Enterprise Editions)*

*Get Greater Accuracy in Pipeline Tracking for You and Your Team*

- :: Align with your collaborative sales organization
- :: Increase the visibility of each team member's contribution to the pipeline
- :: Improve data quality with a single source of truth for split opportunities

Sales organizations often support collaborative sales environments in which multiple individuals join efforts to close valuable opportunities. A key element to successfully motivating and retaining your team in such an environment is giving credit where credit is due.

- **Assign split (%) to sales team**  
Although you can already use the Team Selling feature to manage team members involved in a deal, you can now assign a percentage split to team members to reflect their share of credit for a deal. That functionality means no more duplicate opportunities just to capture each rep's portion of a deal.
- **Generate accurate pipeline reports**  
Empower sales reps and executives with pipeline reporting that accurately reflects each team member's contribution. Opportunity Splitting reports automatically include opportunities with and without splits to provide a single starting point for a complete picture of your pipeline.

**Note:** Please contact Salesforce CRM Customer Service & Support to have this feature enabled. To enable Opportunity Splitting, you must also enable Team Selling.

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

### **APPROVAL WORKFLOW RECALL ACTIONS** *(Enterprise, Unlimited and Developer Editions)*

*Improve Control and Flexibility for Users and Administrators*

- :: Enable users to recall and resubmit requests without administrator intervention
- :: Improve an administrator's control over what happens when a record is recalled

With Approval Workflow Recall Actions, you can take actions whenever an approval request is recalled. Recall Actions also makes it possible for the submitter to edit a Force.com record and resubmit it for approval, without the administrator "resetting" the record for resubmission. You can use Approval Workflow Recall Actions to reverse any field updates performed in the approval process or notify key people in the organization whenever a record is recalled.

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

[[Back to Index](#)]

## **CLICK-AND-CREATE EVENTS** *(All Editions)*

### *Streamline Event Creation*

- :: Create events with just a few clicks from the daily and weekly calendars
- :: Configure Click-and-Create fields using the Event Mini Page layout

With Click-and-Create Events, you can double-click on the calendar, enter event details, and save an event without leaving your calendar. Administrators can also configure the layout and contents of the Click-and-Create screen.

- **Configure Click-and-Create fields to meet your company's requirements**  
You can configure Click-and-Create fields to show any standard event field such as name, location, or phone. You can also define custom fields for when events are created using Click-and-Create Events.

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

[[Back to Index](#)]

## **DRAG-AND-DROP SCHEDULER** *(All Editions)*

### *Effortlessly Create Events*

- :: Create events by simply dragging List View records to the weekly calendar

With Drag-and-Drop Scheduler, you can schedule an appointment with an account, contact, or lead by dragging customer information into your calendar. Creating events has never been easier. From a List View, you can drag customer records into a timeslot in your weekly calendar, provide additional event details, and save the event without leaving the list. Information about the customer, such as name and phone number, is automatically related to the event, saving you valuable time and effort.

- **Configure Drag-and-Drop Scheduler fields to meet your company's requirements**  
Using the Event Mini Page layout, you can configure Drag-and-Drop Scheduler to show standard event fields such as name, location, or phone. You can also define custom fields for events that are created using the Drag-and-Drop Scheduler.

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

[[Back to Index](#)]

## **SCHEDULE AND EMAIL REPORTS** *(Professional, Enterprise, Unlimited, and Developer Editions)*

### *Get Your Most Important Reports via Email, When You Want Them*

- :: Push reports directly to users
- :: Eliminate the need for users to log into Salesforce CRM

With Schedule and Email Reports, you can set up a schedule and email reports to any user with the necessary permissions. For example, marketing managers can receive the status of their campaigns in a Summary report every Friday.

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

[[Back to Index](#)]

### **CAMPAIGN INFLUENCE** *(All Editions)*

*Get Instant Visibility into All Campaigns that Influenced an Opportunity*

- :: Tie multiple campaigns to a single opportunity
- :: Measure both the direct and influenced ROI of your campaigns

With Winter '09, you can see the impact *all* your marketing campaigns had on pipeline creation. With Campaign Influence, you can automatically associate campaigns with opportunities based on custom business logic to get valuable insight into how your marketing programs are performing.

- **Manually add influenced campaigns**  
Your sales team can add influenced campaigns directly to an opportunity using the Campaign Influence related list.
- **Automate association with custom logic**  
All campaigns related to contacts listed on the opportunity prior to the opportunity close date will automatically populate in the Campaign Influence related list. You can customize the association rules by creating filters based on standard and custom fields on campaigns and campaign members.
- **Leverage out-of-the-box reporting**  
With a new standard report, end users can easily see which campaigns are influencing deals and which are not.

**Note:** Reports are automatically visible. Automatic association logic requires some setup.

[[Back to Index](#)]

### **WORKFLOW FROM CASE COMMENTS** *(Enterprise and Unlimited Editions)*

*Automate Processes Across Your Organization*

- :: Assign case comments to workflow

Your complex case processes cross many boundaries within your own organization, requiring input and actions from multiple people to reach a successful resolution. With Workflow From Case Comments, you can now fully automate these processes. The system will monitor the case comments for any change and take appropriate action once the change is initiated.

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

[[Back to Index](#)]

### **CASE TEAMS** *(Enterprise and Unlimited Editions)*

*Improve Productivity and Collaboration in Complex Cases*

- :: Create permanent teams that collaborate on cases
- :: Create a unique team to process a single case

It is important to identify all individuals within case processing who will be responsible for contributing to the case. With Case Teams, you can now set up permanent teams that are assigned to an account or create unique case teams within a single case. Case Teams gives you more flexibility in the sharing models around cases.

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

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

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

*Monitor and Track Customer Commitments*

- :: Accurately monitor customer commitments within case processes
- :: Assign entitlements to an Account or Asset
- :: Create cases for Entitlements from Account, Contact, Contract, Asset, or Customer Portal

It is critical to monitor customer commitments during case processing. With Entitlements, you now have complete visibility into those commitments. Within the case, Entitlements gives you the exact milestones for your first response to the customer and the time allowed to resolve the issue.

**Note:** Feature is an add-on, Entitlements 2.0, available through the Force.com AppExchange.

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

## Salesforce CRM Partner Networks

## **SALESFORCE CRM MOBILE FOR PARTNERS** *(Enterprise and Unlimited Editions, Gold Partner Portal Licenses)*

*Drive Partner Loyalty and Productivity with Mobile Support*

- :: Give partners anytime, anywhere access
- :: Provide partners with the Partner Portal on their mobile devices
- :: Let partners update customer and sales data on the go

Channel partners, brokers, and agents are often out in the field meeting with customers, without a laptop or access to the Internet. But no matter where they are, partners need customer and sales information at their fingertips to close business. With Salesforce CRM Mobile for Partners, channel partners can view, update, and interact with leads, opportunities, contacts, and custom objects right from their handheld devices.

- **Portal tab access for mobile devices**  
Give channel partners the same access to sales data, whether they're in the portal or on their mobile devices.
- **View and update records**  
Let agents and brokers view and update customer and sales data from anywhere.
- **Mobile device support**  
Enable partners using mobile devices by RIM (BlackBerry), Palm, Microsoft, or Apple (iPhone) to get up and running in minutes.

**Note:** Mobile licenses for partners are not included with the Gold Partner Portal license fee and must be purchased separately. Please contact your account executive for more information.

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

## **CALENDAR AND EVENTS FOR PARTNERS** *(Enterprise and Unlimited Editions, Silver and Gold Partner Portal Licenses)*

*Increase Productivity by Empowering Partners to Manage their Calendars*

- :: Give channel partners intuitive and robust calendar features to manage their schedules
- :: Publish marketing and program events to partners' calendars

Your partners need to keep track of their customer appointments and manage their overall schedules. With Calendar and Events in the Partner Portal, your partners can easily manage their time using intuitive Web 2.0

calendar functionality. You can also “push” marketing events to partners to provide details on the what, where, and when of upcoming marketing events.

- **Full calendar management**  
Partners can see daily, weekly, and monthly calendar views.
- **Calendar sharing**  
Partners can share their calendars with others and view multiuser calendars to easily schedule meetings.
- **Partner marketing calendars**  
You can ensure partners are aware of upcoming events by placing your marketing events directly into their calendars.

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

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

## **HTML MESSAGES FOR PARTNER PORTAL** *(Enterprise and Unlimited Editions, Gold Partner Portal Licenses)*

*Get Your Marketing Message Out to Partners*

- :: Provide in-context messages to channel partners
- :: Use HTML Messages to guide partners through processes
- :: Leverage HTML Messages to brand messages in all languages

You spend time training and ramping up your channel partners so they can be successful. Now, with HTML Messages for Partner Portal, you can deliver process, product, and sales tips right to the main portal pages to drive home the message and increase productivity. HTML Messages lets you define branded HTML content on standard and custom object home pages. With HTML Messages, you can keep partners up to speed on new products, promotions, and partner programs. You can also use HTML Messages to provide instructions to partners to help them with their jobs.

- **HTML setup**  
Easily set up your HTML to broadcast targeted messages in multiple languages for global deployments.
- **Branding for all portal pages**  
Brand your messages and expose them on all portal pages, including custom object pages.

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

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

## **MASS SHARE RECORDS WITH SALESFORCE TO SALESFORCE** *(All Editions)*

*Share Multiple Records at Once*

- :: Easily select multiple records to share from list views
- :: Share both records and their related lists at once

Although you may have wanted to share multiple records with your connections in the past, doing so one record at a time was cumbersome. With Mass Share Records in Salesforce to Salesforce, you can use list views to define your criteria and easily share as many records—including related records—with one or more of your connections as you want.

- **Define business criteria for sharing**  
Use list views to define what you want to share and select all the records you want to share at once.
- **Share related lists when mass sharing**  
You can share related lists to share thousands of “parent” records with all of their “child” records.

**Note:** This feature is available, but not enabled by default for Salesforce CRM customers. It is available only to administrators and users with “Manage Connections” permission.

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

## **MASS INVITE WITH SALESFORCE TO SALESFORCE** *(All Editions)*

*Connect with Any Salesforce CRM Customer for Free*

- :: Let all Salesforce CRM customers connect with each other and share records for free
- :: Send multiple connection invitations at once

In Winter '09, any Salesforce CRM customer can connect to any other Salesforce CRM customer, regardless of what edition either customer is using. With Mass Invite, customers can send invitations to thousands of contacts at once, making it easier to get started sharing information.

- **Multiple email addresses in invitations**  
Send invitations to all your contacts with a single click, as long as they have a valid email address.

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

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

## **RELATED LIST SHARING WITH SALESFORCE TO SALESFORCE** *(All Editions)*

*Improve Collaboration by Sharing More Information*

- :: Instantly share an object and its related lists in a single click
- :: Let connections choose whether to accept or reject related-list details
- :: Provide better visibility into accounts with more complete information

With Related List Sharing with Salesforce to Salesforce, you can increase visibility into your networks and share more information. You can share an account with a connection that includes all Related Activities, Opportunities, Contacts, Orders, or other data, giving your connection a 360-degree view of that Account.

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

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

## **SHARE LOOKUP REFERENCES WITH SALESFORCE TO SALESFORCE** *(All Editions)*

*Give More Information to Your Connections*

- :: Give insight into record ownership
- :: Provide better alignment for channel managers and partner reps
- :: Give visibility into campaign information

Sharing details on records is critical for better collaboration. With Salesforce to Salesforce in Winter '09, you can now share lookup (or reference field) information to give your connections greater visibility into details such as a record owner, an opportunity, or a campaign. Your connections become more aware of who is working an opportunity and what campaign helped generate the lead.

- **Lookup reference**  
Share lookup details with your connections for both standard and custom lookup fields.
- **Map lookups**  
Map your lookup information so data is updated appropriately.

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

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

### **SALESFORCE CRM MOBILE FOR IPHONE: EDIT** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)* *Edit, Create, and Delete Records from the iPhone*

- :: Edit existing records, create new records, or delete unwanted records directly from the iPhone

The launch of Salesforce CRM Mobile for the iPhone brings together the iPhone's effortless navigation and stunning display with the unparalleled power of the Salesforce CRM Mobile platform.

Although the initial launch of the application was read-only, with the new iPhone Edit feature, users can fully edit Salesforce CRM information, create new records on-the-fly, and delete records that are no longer needed. You simply tap the field you want to edit and use the iPhone keyboard to make the change. Editing capabilities extend to both standard and custom objects that have been mobile enabled.

These enhanced editing features bring essential functionality to the iPhone and serve as the basis for exciting future enhancements.

**Note:** Automatically visible to all users. Update required.

[[Back to Index](#).]

### **VISUALFORCE MOBILE GENERALLY AVAILABLE** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)* *Get Visualforce Functionality on Mobile Devices*

- :: Make Visualforce features available on mobile devices via Web pages accessed through a wireless connection
- :: Deliver a "hybrid" mobile experience, combining reliable local client functionality with the broad capabilities of the Web
- :: Let administrators pull together select Visualforce elements or fields from various objects into a single screen that is optimized for mobile viewing

Visualforce Mobile fills the gap between the limitations of the current "object-only" mobile client technology and the near-limitless features of the Salesforce CRM desktop application.

The new tab functionality merges a client application's performance with the Web's flexibility to create a true "hybrid" mobile experience. Using a mobile browser, administrators can mobile enable tabs and other features previously available only on the desktop version of Salesforce CRM. This capability greatly extends the customizability of the Salesforce CRM Mobile service.

By creating a Visualforce page and mobilizing it, administrators can create any kind of form or wizard and make it instantly available as a tab in the mobile application. Administrators can also take advantage of specific features available on mobile Web browsers.

As wireless network coverage broadens and data capacity improves, Salesforce CRM Mobile will be redeveloped to more fully leverage the mobile Web. BlackBerry is the first platform to support this new capability, with other mobile platforms to follow.

**Note:** Generally available, but not automatically visible. Feature is enabled, but requires some setup and users must upgrade to the latest version of the Salesforce CRM Mobile client for BlackBerry.

[[Back to Index](#).]

## **DASHBOARDS FOR MOBILE** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)*

*Quickly Access Salesforce Dashboards on Mobile Devices*

- :: Let mobile users view and track performance using dashboards while on-the-go
- :: View dashboards as a normal tab

Dashboards for Mobile are a perfect fit for managers and field employees who want to get a quick peek at their dashboard data while away from the office.

Administrators can mobilize the Dashboard tab and instantly give users access to all their Salesforce CRM dashboards. Dashboards are an enormously popular feature in Salesforce CRM, and the opportunity to access this important data while on the move greatly enhances the power of Salesforce CRM management information.

**Note:** Generally available, but not automatically visible. Feature is enabled, but requires some setup and users must upgrade to the latest version of the Salesforce CRM Mobile client for BlackBerry.

[ [Back to Index](#) ]

## **MOBILE PIN LOGIN SECURITY** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)*

*Protect Usernames and Passwords by Substituting Numeric PINs on the Device Login Display*

- :: Protect a mobile user's data from information thieves
- :: Enable other forms of security authentication schemes

The Mobile PIN Login feature keeps prying eyes from nabbing the usernames and passwords of unsuspecting Salesforce CRM Mobile customers by substituting a unique five-digit PIN in place of the Salesforce CRM username and password.

With the Mobile PIN Login, users' devices can be securely paired with their Salesforce CRM accounts once, eliminating the need for subsequent username and password authentication. In addition, supporting two-factor or delegated authentication security schemes becomes a straightforward process. As more large customers overhaul their internal security policies and practices, such advances become increasingly important.

This feature is generally available for the iPhone and BlackBerry, with other mobile platforms to follow.

**Note:** Automatically visible to all users. Upgrade required.

[ [Back to Index](#) ]

## **ENHANCED MOBILE DATA CONTROLS AND TAB MANAGEMENT** *(Trial, Professional, Enterprise, Unlimited, and Developer Editions. Professional and Enterprise Editions require a mobile license.)*

*Get Greater Granularity in Data Visibility*

- :: Gain greater flexibility and control over what data mobile users can access and how they interact with that data
- :: Use easy tab management to make adding, removing, or re-ordering tabs a cinch

Enhanced Mobile Data Controls gives administrators greater control. Administrators can determine how users in the field interact with Salesforce CRM data on their mobile devices. With these new controls, you can specify which data users can see, edit, create, or delete on their mobile devices. For example, you could create a mobile inventory management tool that lets a user change the quantity of a particular item, but not create new product or inventory entries. You can make these configuration changes on the Mobile Admin Console.

Tab Management lets you decide which tabs should be enabled on the mobile device and in what order they appear. You can also specify different tabs for different users, depending on what information those users need to access.

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

[[Back to Index](#).]