

With the 18th generation of our on-demand solution, salesforce.com is paving the way for the next stage of the on-demand revolution. In addition to investing in our core CRM applications — Salesforce and Supportforce — we are unveiling powerful new capabilities to extend CRM and go well beyond it.

The Summer '05 release introduces Multiforce, salesforce.com's new on-demand operating system that allows companies to create, manage, and share all their business applications in a single environment. This powerful addition shatters all misconceptions about the limitations of the on-demand model. Now, you are limited only by your imagination.

Need inspiration to get started? The [CRM Success Web site](#) is an excellent resource. In addition to all the latest information about Summer '05, www.crmsuccess.com features best practices, tools, tips, training, an active customer community, and much more — everything you need to ensure your CRM success.

Another excellent resource is the salesforce.com On-Demand Marketplace, where you can learn about third-party solutions that extend the value of salesforce.com. More than 45 new solutions have been added to the marketplace since the Winter '05 release in November, so be sure to visit www.salesforce.com/partners to check out the new offerings.

multiforce [Introducing Multiforce](#) 2



Customizable Forecasting	3
Sales Methodologies	4
Mass Address Update	4



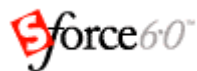
Email Management – Email-to-Case	6
Advanced Case Escalation	6
Customer Self-Service Portal	
Style Editor	7



Custom Formula Fields	8
Custom Tabs in Professional Edition	9
Customizable Standard Related Lists	10
Other Customforce Enhancements	10

Reporting & Analytics

Custom Report Formulas	12
Custom Conditional Highlighting	12
Other Reporting Enhancements	13



Sforce Data Loader	14
Import De-Duplication	14
Sforce Partner Portal Toolkit	15

Sforce 6.0 Web Services API	15
Other Sforce Enhancements	16

CRM Success.com [Resources & Training](#) 18

Note: Any unreleased services or features referenced in this or other public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available.

MULTIFORCE

MULTIFORCE *(Enterprise & Professional Editions)*

All your applications. One on-demand environment.

- :: Provide single-click access to multiple applications, including Salesforce, Supportforce, and custom apps
- :: Create new custom applications that combine existing and custom tabs
- :: Improve usability and deployment with new tab sets targeted to different users
- :: Create and deploy new non-CRM applications to new user groups

Multiforce takes salesforce.com's advanced customization capabilities to the next level. With Multiforce, you can create and deploy completely new on-demand applications right within your existing deployment. Using the new Multiforce menu, users have single-click access to different applications, comprised of sets of standard and/or custom tabs. Your new applications share the same data model, security model, and user interface as your Salesforce and Supportforce deployments.

- **Custom Applications**

Multiforce allows you to group standard and/or custom tabs to create and deliver custom applications — all within your existing Salesforce deployment. Your custom apps can be made up of standard tabs that group together existing functionality, such as lead management. Or you can create sets of custom tabs that make up completely new apps designed for non-CRM processes like recruiting, project management, or bug tracking.

- **Multiforce Menu**

A new Multiforce drop-down menu now appears in the upper-right-hand corner of all screens, providing one-click access to the available standard apps (Salesforce and Supportforce), as well as the custom apps you create. The list of available apps can be configured on a per-profile basis, giving different groups of users access to different applications.

- **Platform for Expanding On Demand in Your Company**

Multiforce provides the framework and infrastructure to support growing your salesforce.com deployment to easily reach new parts of your company, be it new sales, marketing, and support groups or entirely new teams in HR or development. Providing the ability to focus the deployment of select parts of functionality to certain users, or create new apps that create new functionality, Multiforce creates the opportunity for effective and creative uses of salesforce.com-based applications in new contexts and environments.

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

SALESFORCE

CUSTOMIZABLE FORECASTING *(Enterprise & Professional Editions)*

Enhanced, real-time forecasting for flexible analysis

- :: Get forecast data in real time
- :: Drill down into opportunities for deeper insight
- :: Roll up forecasts for an integrated, global view
- :: Customize views to meet different business needs
- :: Override data to control overall forecast

For many managers, forecasting needs to be flexible to provide the right level of visibility into the business. Managers may need to view forecasts for different time periods, product lines, subordinates, revenue schedules, and many other factors. With Summer '05, Salesforce includes more customization capabilities in forecasting so managers can easily create the precise forecasts they need to successfully manage their organizations.

- **Instant Forecast Updates**
With Summer '05, forecasts are automatically updated from opportunity data as the data changes. Real-time status indicators show update status so managers can be assured that they are viewing up-to-the-minute information.
- **Multiple Forecasting Options**
Summer '05 provides multiple options for creating forecasts by opportunity close date, specific product-line close dates, and revenue schedules. Opportunity close date forecasts give managers a view based on expected close date; product-line forecasts allow separation of revenue by product line; and with revenue schedule forecasting, managers can view expected revenue payments over a period of time.
- **Flexible Time-Period Analysis**
With this feature, managers have the option to create forecasts based on months or quarters. Users can also specify the starting month or quarter for the forecast.
- **Flexible Views**
Managers can create forecasts that display information in multiple ways, depending on their goals. Managers can view different forecast periods (e.g., six months vs. one year), create forecasts for individual reps or managers, and display the forecast data in a variety of formats such as exact number, whole number, quota percentage, etc.
- **Drill-down/ Roll-up**
Drill-down and roll-up functionality enables managers to drill deeper to view the specific opportunities and products that contribute to the forecast. Roll-up capabilities enable managers to view consolidated forecasts across product lines and multiple reps.
- **Historical Forecasts**
With Summer '05, managers can view forecasts from previous time periods with the relevant opportunity data from that time period. This gives managers the power to go back in time to see how forecasts are changing and the reasons behind the differences.
- **Manager Override**
Occasionally, a manager may want to override an aggressive forecast, changing the amount or close date for a specific opportunity. With Summer '05, managers can override specific data on an opportunity for a forecast and keep this information private so the owner of the opportunity is not aware of the changes.

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

SALES METHODOLOGIES *(Enterprise & Professional Editions)*

Leading sales methodologies integrated into Salesforce

- :: Leverage your investment in methodologies and increase their impact on sales
- :: Increase SFA and methodology adoption and compliance
- :: Minimize administrative time

Today, many sales organizations utilize formal sales methodologies from firms that specialize in training and sales processes. Some sales methodology firms provide applications that help sales representatives capture and analyze data to support the selling process. Integrating these applications with Salesforce is critical for ensuring adherence to the process, maximizing management visibility, and reducing the overall time spent on data capture and analysis. The Summer '05 release features integration with the leading sales methodology authors' applications and processes to ensure that Salesforce works hand-in-hand with your sales methodology.

- **Best-in-Class Partners**
Salesforce.com is partnering with the leading methodology authors to integrate sales methodologies into Salesforce. Current partners include Miller Heiman, SPI (Solution Selling), The Complex Sale, ValueVision, and others.
- **Third-Party Applications**
Some of these partners — such as Miller Heiman, SPI, and The Complex Sale — have already developed integrated methodology applications that are Sforce certified. These applications were developed specifically for Salesforce and are sold by each of the methodology authors.
- **Bi-Directional Data Integration**
Each of the methodology applications includes bi-directional data integration that pulls Salesforce information such as account, contact, and opportunity information and sends information back to Salesforce that is stored in custom fields created for each methodology.
- **Integrated Reporting**
By integrating sales methodology information into Salesforce, custom reports can be constructed in Salesforce to report on user compliance with your methodology, revenue and forecasting by methodology stage, and virtually any other analysis involving the methodology-related fields.

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

MASS ADDRESS UPDATE *(All Editions)*

Standardizing data values for more consistency

- :: Identify inconsistencies in data entry
- :: Standardize data values for higher data quality and more accurate reporting
- :: Perform large-scale updates to eliminate poor-quality data

For companies that have problems maintaining consistent data quality in Salesforce, mass address update is a first step towards improving data quality. Administrators can change the country and state fields for accounts, contacts, leads, and contracts from inconsistent values to identical values. This enables far more accurate reporting and greater business insight.

- **Wizard-Based Process**
A three-step wizard takes administrators through the search-and-replace process, clearly identifying options and providing the opportunity to back up to previous steps.

- **Automated Search**
This feature will automatically search for all country and state fields that users have entered and provide a consolidated list to the administrator. This makes it easy to identify the inconsistent values that need to be replaced with a standard value.
- **Large-Scale Replacement**
Mass address update searches and replaces the country and state standard fields across all accounts, contacts, and contracts. Administrators will no longer have to manually change these fields.
- **Count and Confirm**
Before the final replacement of values is made, the wizard shows the number of items that will be replaced and the categories into which those items fall. Users can abort the process at this point if needed.

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

SUPPORTFORCE

EMAIL MANAGEMENT – EMAIL-TO-CASE *(Enterprise & Professional Editions)*

Better response and management of incoming emails

- :: Manage inbound email from customers efficiently
- :: Save time by automatically associating email activity with cases
- :: Automatically create cases from inbound emails

Service organizations need an efficient way to manage and respond to incoming customer emails. With Summer '05, new email-to-case functionality will meet the needs of more sophisticated customer service and support environments and greatly reduce the processing and response time for customer emails. By using multiple customer service email addresses, incoming messages can automatically generate cases that are routed to appropriate case queues. Ongoing email interactions with customers happen from within their cases for greater efficiency and better tracking of all email dialogue.

- **Automatic Case Creation**
With Summer '05, new cases can be created automatically in Supportforce for inbound customer emails. These new cases can be routed to appropriate case queues based on the address to which the email was sent (see Routing Addresses below).
- **Routing Addresses**
For routing purposes, you can set up multiple email addresses, such as goldsupport@acme.com and platinumsupport@acme.com so that incoming messages go directly to the right agent or queue. When an agent sends an email from Supportforce, a new dropdown box appears to allow the use of one of your routing addresses as the “from” address in the email.
- **Automatic Case Threading**
When agents respond to customer emails in Supportforce, those messages are automatically associated back to the case. Subsequent customer responses are also automatically tied to the original case, and a task is assigned to the agent, alerting them to the new customer message.
- **Native Email Support**
A new email object contains all email interaction and supports forwarding, reply to all, and attachments directly from within Supportforce. When combined with cases, this email object displays all email interaction related to cases. Service agents can operate entirely within Supportforce without the need to use an external email application.
- **Integrated Reporting**
New standard reports help you easily report on all email interaction with customers. For example, you can identify the cases with unanswered email or calculate average response times.

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

ADVANCED CASE ESCALATION *(Enterprise & Professional Editions)*

Helping you meet — or exceed — customer service levels

- :: Meet your service level commitments by adapting escalation rules for more sophisticated requirements
- :: Ensure cases are “touched” in a timely manner

Service organizations using Supportforce depend heavily on case escalation rules to ensure customer service levels are met. With the Summer '05 release, Supportforce provides advanced settings to meet the needs of more sophisticated customer service and support environments.

Prior to Summer '05, all case escalations were based on the time the case was created in Supportforce, and all escalation actions were active until a case was "closed." With the Summer '05 release, there are two additional options for setting escalations.

- **Based on Last Modified Time**
Companies will now be able to reset escalation times based on the last modified time of the case, every time the case is updated. This allows companies to reflect service level commitments that require a response within a set amount of time from the *last* interaction on a case.
- **Disabled After "First Touch"**
Some companies have service commitments that require customer issues to be "acknowledged" or "touched" in a timely manner. In such situations, an escalation is required only if the case is not touched within the specified amount of time. Supportforce allows companies to set escalations that expire automatically as soon as the case is first modified.

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

CUSTOMER SELF-SERVICE PORTAL STYLE EDITOR

(Enterprise & Professional Editions)

Configure the look and feel of your self-service portal

- :: Match your customer self-service portal to your corporate branding
- :: Configure and launch your self-service portal more quickly
- :: Keep administration and on-going maintenance costs at a bare minimum

To make the customer's experience as comfortable as possible, a company's customer self-service portal must match the look and feel of the company's corporate Web site and be very easy to use. Today's busy service organizations want to provide that environment for their customers without taxing their scarce resources. The Summer '05 release of Supportforce offers tools to help companies efficiently configure their portals without any design or technical help.

- **Point-and-Click Style Editor**
The style editor allows easy configuration of your self-service portal to match your corporate branding without requiring any scripting or programming. Administrators can use the style editor to adjust multiple portal themes including the fonts and colors of text, background, headers, and footers — all using a visual, point-and-click interface. Advanced users can opt to modify the style scripts directly through the same interface.
- **Enhanced Style Templates**
In this release, six new style sheets will be provided out-of-the-box, replacing the old styles. All customers using one of the former default styles will see their portals upgraded with the new look and feel. The former classic default style will also be made available as an option for compatibility.
- **Portal Sandbox**
To ensure that the revised portal will appear and operate as you've planned, the new portal sandbox allows companies to create, test, and approve new styles before applying them to the live portal. This allows administrators to work on new designs in a safe, "offline" environment without affecting the live portal.

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

CUSTOMFORCE

CUSTOM FORMULA FIELDS *(All Editions)*

The calculations you need to monitor your business

- :: Create complex formulas to support the unique calculations your business requires
- :: Create formula fields using familiar, Excel-like syntax and functions
- :: Allow business users to simply add application logic without programming

We are pleased to announce the arrival of the second-most-requested feature: dynamically computed custom formula fields. In addition to calculating numeric values, administrators can also create formulas that produce date, date/time, duration, text, or hyperlink results. Users who are familiar with Excel formulas will master custom formula fields in a flash; the syntax and built-in functions are very similar to those in Microsoft's popular spreadsheet program. Custom formula fields, which can be placed on any object (just as you would create a custom field) will come in handy in a wide variety of situations such as computing gross margin, opportunity discounting, commissions, lead scoring, round-robin lead and case assignment, click-to-dial for phone numbers, and more.

- **New Formula Field Type**
A new custom field type, *Formula*, is available on any standard or custom object. The formula definition includes the desired data type of the formula output — number, currency, percent, text, date, or date/time — and the formula expression.
- **Excel-Like Formula Language and Function Library**
The language syntax and built-in functions for math, text, date/time, and logical operations are all similar to those in Excel. While Excel formulas operate on cells in a spreadsheet, formula fields operate on other standard and custom fields in Salesforce. For example: Discounted Amount = $\{!Amount\} - (\{!Amount\} * \{!Pct_Discount\})$.
- **Simple Controls and Wizards**
As with all features in the point-and-click Customforce tool, formula fields were designed with business users and non-technical administrators in mind. The custom formula wizard provides a rich, interactive environment for defining formulas and includes integrated help and examples.
- **Powerful Conditional Logic**
The formula language includes powerful IF and CASE functions, giving users the ability to embed application logic right in their formula fields. For example, a commission formula could calculate a commission amount only if an opportunity's status is closed/won.
- **Real-Time Computation... Everywhere**
Formulas are recomputed in real time for every request, so they are guaranteed to always be up-to-date. And because they are defined as custom fields, formula fields can be used everywhere custom fields are available — not only in page layouts, but also in reports, workflow rules, dashboards, assignment rules, email templates, and more.
- **Dynamic URLs and Custom Links**
Fans of Salesforce's custom links (Web links) for integration purposes will be excited about the built-in hyperlink function. You can dynamically create Web links and place them anywhere custom fields can be displayed including related lists, list views, and reports. This enables many creative integration possibilities, such as click-to-dial phone integration for contact and account related lists that display phone numbers.

Go to the Customforce area of www.crmsuccess.com/summer05 and visit the [Custom Formula Fields](#) page, where you can download a quick reference guide (also included at the [end of this PDF document](#)) and see examples of the formulas that other companies are using.

The Summer '05 release also includes new formula functionality at the report level. See the [Custom Report Formulas](#) entry in the Reporting & Analytics section (page 12) for more details.

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

CUSTOM TABS – NOW IN PROFESSIONAL EDITION

(Enterprise & Professional Editions)

Now everyone can be a customizer

- :: Create custom objects, related lists, and tabs in Professional Edition
- :: Combine with Multiforce to create your own custom apps beyond CRM

Now everyone can be a customizer! With Summer '05, custom tabs, custom objects, and custom related lists are available in both Professional and Enterprise Editions. Professional Edition customers can extend their CRM solutions to support their unique business requirements by creating new tabs (e.g., Competitors, Expense Reports, or Customer References). Moreover, Professional Edition customers can leverage custom tabs and Multiforce to easily build new on-demand applications for managing all their business information (e.g., recruiting, project management, change management, content management, and more).

- **Custom Tabs**
Customforce allows administrators to create new custom tabs that look and behave just like the standard tabs provided within Salesforce and Supportforce. And like standard tabs, custom tabs can have their own color, security, and display properties.
- **Custom Objects**
Custom tabs are associated with custom objects. As a Salesforce administrator, you can define your own custom objects to complement standard objects such as accounts, campaigns, opportunities, and cases. For example, if you need to track expense data, you can create a new custom object labeled "Expenses." You can then add custom fields to your custom objects just as you can to standard objects.
- **Object Relationships and Related Lists**
You can define relationships between different custom objects and/or between standard and custom objects. For example, an expense custom object can have a relationship to the opportunity standard object in Salesforce. This will automatically create a related list for expenses on the opportunity page. The object relationships in Salesforce are similar to the "Foreign Key" concept in database terminology.
- **Simple Controls and Wizards**
The interface for designing new objects and tabs was designed for business users and non-technical administrators so that everyone can extend their CRM and build new on-demand applications quickly and easily.

Visit www.customforce.com for tools, demos, customer case studies, and other information to help you get started using Customforce to customize Salesforce for your organization's unique needs.

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

CUSTOMIZABLE STANDARD RELATED LISTS *(Enterprise & Professional Editions)*

The flexibility to select and organize related data

- :: Customize the fields, order, and sorting of standard related lists
- :: Provide quick access to key data from related objects
- :: Create single-page views that incorporate key fields from related tabs

Salesforce.com customers love the power and flexibility of Customforce, allowing administrators to create their own custom related lists and configure them to meet the needs of their specific businesses. Summer '05 extends that power to include most standard related lists as well, in response to popular demand that made this the number-one feature request of our customer community. With this new capability, you can customize the columns displayed, column order, and sort order of the records in virtually any related list, all with just a few clicks. For Enterprise Edition customers, related list customizations are definable for each page layout, supporting granular combinations of profile- and record-type-based layouts.

- **Columns Displayed**
Administrators can choose up to 10 fields to display in a related list. Any standard or custom field is available, including long text area, multi-select picklist, and formula fields. Customizations are carried over for printable views and *View More* pages as well, ensuring your users see a consistent view of information.
- **Column Order**
Want to change the order in which the columns appear in a related list? With the exception of the standard *Name* field for each object, you can change the position of any field displayed.
- **Record Sort Order**
With Summer '05, you can sort the records displayed in a related list by a different field. For example, you can change the opportunities related list to sort by amount or modify the cases related list to sort by status.
- **Record Number**
The total number of records in a related list appears, up to 50. If more than 50 records are present, a "50+" indicator is shown.

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

OTHER CUSTOMFORCE ENHANCEMENTS

More power to create custom CRM and new applications

- :: Create multiple, custom list views with complex criteria
- :: Add more custom fields to each object
- :: Team Edition customers benefit from new customization functionality

New features in the Summer '05 release provide additional capabilities for customizing Salesforce and Supportforce. In addition, some customization functionality and usability enhancements are extended to Team Edition.

- **Advanced List Views** *(All Editions)*
Advanced list views leverage the power of advanced report filters to list views throughout the application. With this functionality, users can create very specific views for accounts, opportunities, contacts, and every other list in Salesforce and Supportforce. Users can combine logic statements to create these views. This function helps users access information more quickly in a format that is customized for their needs.

- *Filter Picklists*: For filters that use a picklist field, a picklist menu selection is now available by clicking on the magnifying glass icon. This feature displays the picklist values so users are no longer required to remember all the potential choices and exact phrasing.
- *Logic Statements*: Logic statements are available so users can combine AND/OR statements to create highly specific views of information. Parentheses can be used to group logic statements together.
- *Broad Application*: Advanced list views can be applied throughout the application so users can create specific views for accounts, opportunities, contacts, leads, and any other function with the *Create New View* function.
- **More Custom Fields per Object** (*Enterprise Edition Only*)
Prior to Summer '05, an object could have a maximum of 300 custom fields. With the new release, that limit is raised to 500 fields per object, for Enterprise Edition customers.
- **Email Templates and Mail Merge on Custom Objects** (*Enterprise & Professional Editions*)
The same email template and mail merge functionality available in standard objects is now available for custom objects, allowing the creation of merged emails and documents based on fields from the new objects your organization created.

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

REPORTING & ANALYTICS

CUSTOM REPORT FORMULAS *(All Editions)*

Bringing the power of customization to reports

- :: Create custom formulas for your reports and dashboards
- :: Add derived values to your reports and summarize data for ad-hoc analysis
- :: Quickly calculate win rates, coverage ratios, actual vs. goal comparisons, and more
- :: Avoid the complexity of downloading your data for analysis

Every organization has unique requirements for analyzing information critical to their sales, marketing, and service efforts. Frequently, users need to aggregate and perform calculations on raw data to get the right insight, spot trends, or uncover issues. With Summer '05, users can create their own mathematical formulas that combine data from summary fields in a report, making that critical information more accessible, more quickly.

- **Mathematical Calculations on Summary Fields**
A broad range of mathematical operators and complex formulas can be used to construct formulas on summary fields contained within reports.
- **Dashboard Usage**
Reports with calculations can be used in dashboards for even greater flexibility and insight.
- **Wizard-Driven Setup**
Report formulas are available in the custom report creation wizard. Fields can be selected from menus along with available mathematical operators, making it easy for any business user to define and set up formulas.

The Summer '05 release also includes new formula functionality at the record level. See the [Custom Formula Fields](#) entry in the Customforce section (page 8) for more details.

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

CUSTOM CONDITIONAL HIGHLIGHTING *(All Editions)*

Turning report data into business intelligence

- :: Quickly and easily highlight the critical values in a report
- :: Make it easier to spot anomalies
- :: Eliminate manual searches through complex reports

The challenge of reporting is turning large amounts of complex data into business intelligence that can be used to improve performance. Conditional highlighting helps companies find the meaning in their business data. This simple feature allows you to set value thresholds for numerical fields and color code the resulting display to highlight exceptions, easily find out-of-range values, and call attention to anomalies. Conditional highlighting assists in the quick identification of trends and other meaningful analysis.

- **Threshold-Based Highlighting**
With Summer '05, users can choose the appropriate value ranges for a summary field and designate breakpoints for highlighting.

- **Multicolor Displays**
To ensure that the highlighted data are easily seen, you can color code the ranges to create a “stoplight” effect for those who are viewing your reports.
- **Dashboard Illumination**
Highlighted values can appear in dashboard tables, allowing the quick identification of exceptions in a single glance.

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

OTHER REPORTING ENHANCEMENTS *(All Editions)*

More reporting power plus easier administration

- :: Locate reports more quickly and easily
- :: Customize graphs to focus on the information you need
- :: Simplify report administration and management

Several features in the Summer '05 release help users more easily use and customize the reports and charts that they create as well as reduce the amount of time spent managing reports and folders.

- **Mass Report Reordering**
Prior to Summer '05, reordering report folders required clicking on each report folder and moving it up one level at a time. With mass report reordering, users can conveniently view all their report folders in a separate window and quickly customize the order of their folders.
- **User Log-in Report**
A new, pre-built report under *Administrative Reports* shows the log-in history for all users. Custom dates and filters can be used to narrow in on specific information. Prior to Summer '05, administrators could view recent log-ins (under *Manage Users* in Setup) but were limited in the filtering options.
- **Axis Scale Customization**
Users can customize the scale on a chart axis, specifying the upper and lower bounds for the graph. This customization can be made in both reports and dashboards.
- **Axis Negative Values**
Graphs will display negative values with the Summer '05 release. This is particularly important with calculated fields and formulas since users may generate graphs with negative values.
- **Boolean TRUE/FALSE**
With Summer '05, filters on Boolean fields benefit from the more intuitive TRUE/FALSE syntax, rather than the previous requirement that users specify 0 for FALSE or 1 for TRUE.

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

SFORCE

SFORCE DATA LOADER *(PILOT – Enterprise Edition)*

Data moves into and out of Salesforce with speed and ease



- :: Minimize data loading hassles with an easy-to-use wizard
- :: Save time with mass updates and mass deletes
- :: Easily tackle large data projects with scalability up to millions of records

Prior to Summer '05, loading data in Salesforce was accomplished through import wizards or by using Sforce directly. The Sforce data loader is an easy-to-use, highly scalable data management tool that can perform large uploads of data, mass updates, mass deletes, and exports for any object (Salesforce, Supportforce, and custom objects).

- **Easy-to-Use Wizard**
The Sforce data loader's simple, wizard-based interface guides users through selecting data sources, mapping fields, and viewing errors. The included drag-and-drop mapping editor makes associating external fields with existing Sforce data types simple and error free.
- **Reusable Maps**
Save mapping files so you can easily load files from multiple data sources. By reusing existing maps, common imports can be easily repeated without remapping.
- **Large File Support**
Unlike Web-based imports, the Sforce data loader supports very large data sets containing millions of rows, allowing for massive data loads and migration of information from existing systems.
- **Extraction Capabilities**
In addition to supporting loading, the data loader allows Salesforce-based information to be bulk extracted into CSV text files for use in other systems.
- **Command Line Interface**
In addition to the wizard, the data loader can be controlled via the command line, allowing imports and exports to be scheduled and repeated on an automated basis.

Note: The Sforce data loader is available on a pilot basis only with the release of Summer '05. To request access to the pilot, log in to Salesforce, click on the Help and Training link, and log a case (in the Support section) that includes a description of your use case. The Sforce data loader will be generally available in the next salesforce.com release (after Summer '05).

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

IMPORT DE-DUPLICATION *(All Editions)*

Making it easier than ever to import your customer data

- :: Ensure the integrity of the data you upload to Salesforce
- :: Prevent duplicate leads and contacts by matching on email, name, or Salesforce ID

Import is receiving major enhancements in the Summer '05 release in response to customer feedback. De-duplication functionality for leads and contacts helps you keep your Salesforce data clean. In addition, we have made significant improvements in import performance.

- **De-Duplication**
In this release, de-duplication functionality will help you avoid importing duplicate leads

and contacts by matching on email address, name, or Salesforce ID (for contacts). This optional setting in the import procedure also allows you to determine behavior for matches: you can choose to update the matching records or skip them.

- **Mass Updates**
Large numbers of accounts, contacts, or leads can be updated at once by running reports, automatically updating the records, and then importing the updated data (which is matched by ID).
- **Improved Performance**
Performance for account and contact import is dramatically improved, so that your customer data will be loaded into Salesforce more quickly than ever.

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

SFORCE PARTNER PORTAL TOOLKIT *(Enterprise Edition Only)*

Leveraging Sforce to empower your channel partners

- :: Create a new partner portal or integrate Salesforce with an existing portal site
- :: Exchange sales and marketing information with your indirect channel partners
- :: Get better insight into channel activities
- :: Drive higher satisfaction within your partner communities

With Summer '05, a new toolkit is available to help companies easily create Web portals to better collaborate and communicate with partners, as well as get better insight into channel activity. With a partner portal integrated with Salesforce, your partners can update opportunity and sales information so you can get a complete view of your business and create integrated forecasts across both direct and indirect channels. Your portal helps you manage direct sales efforts in salesforce.com's best-of-breed CRM solution while easily sharing select information with channel and distribution partners.

By leveraging this toolkit, you can:

- Distribute leads to partners (manually or automatically)
- Receive lead updates from partners
- Share opportunities and collaborate with partners on tasks and activities
- Capture new deal registrations from partners
- Track and analyze lead follow up, closure, and partner performance
- Distribute documents to the appropriate partners
- Tie leads back to marketing campaigns

Sample code and documentation for the Sforce partner portal toolkit are available for download at <http://www.sforce.com/>.

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

SFORCE 6.0 WEB SERVICES API *(Enterprise Edition Only)*

Improving current and future integrations

- :: Improve performance for multiple describe calls
- :: Better support your self-service portal community with a new SelfServiceUser object
- :: Protect existing integrations with backward compatibility for all enhancements

With the Summer '05 release, salesforce.com is upgrading the Sforce Web services API. As always, considerable effort has been made to ensure backward compatibility for applications that

have been written against previous versions of the SOAP API, starting with API 2.5. (Note: older XML-RPC APIs should remain unchanged with this release) The new API provides a number of powerful enhancements that further improve any integration already in place between Salesforce and your other systems.

- **DescribeSObjects**
The 6.0 API has a new call: describeSObjects. This call is similar to describeSObject, but it can take an array of object names and return an array of DescribeSObjectResults. This call can improve the start-up time of your application.
- **DescribeTabs**
DescribeTabs is a new top-level call with this release. Use describeTabs to help you render the tabs that are visible to a user. DescribeTabs has all the metadata needed to render Multiforce applications in another user interface.
- **SelfServiceUser API**
The new release includes a new SelfServiceUser object that supports create, update, query, setPassword, and resetPassword calls. With this new object, you can enable single sign-on for your self-service users.
- **SOSL Enhancements**
Document, Product, and Solution objects are searchable through SOSL in Sforce 6.0.
- **Formula Field Support**
Formula fields are supported on a read-only basis in the 6.0 API. You can also filter on formula fields in SOQL queries.

Visit www.sforce.com for more resources and information about the Sforce 6.0 Web services API.

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

OTHER SFORCE ENHANCEMENTS

Part of our ongoing commitment to ensuring your data is always secure

- :: Get more control over how data can be accessed
- :: Benefit from new options for user authentication and change requests

Summer '05 contains a number of security enhancements to make the system more secure for everyone. Leveraging these new and enhanced security features can ensure that your Salesforce deployment better meets your organization's specific security guidelines and practices.

- **Email Verification (All Editions)**
All email changes in the system require verification. This is to guarantee that users actually own the email address from which they are sending email.
Note: By default, this feature will be enabled for all customers. You can request that this feature be turned off. Customers that request this disablement must provide salesforce.com with a list of the valid domains they own. Contact salesforce.com support to disable email verification for your organization.
- **Requiring SSL (Enterprise & Professional Editions)**
All pages in Salesforce are served up using SSL unless a customer specifically asks for a page without SSL. Enabling this feature requires users to always use SSL, even if they manually request a page using standard HTTP.
Note: By default, this feature is off. To enable it, log in to Salesforce and go to *Setup -> Security Controls -> Session Settings*.
- **Single Sign-On Enhancements (All Editions)**
Use single sign-on to centrally control password policies and the deprovisioning of users. Single sign-on can also allow users within a corporate network to log in seamlessly and automatically (similar to how most Outlook users do not need to log in when they are on the corporate network). For example, this feature allows customers to post links on an

intranet page, or to send report links by email and have users be logged in automatically to view the report. This feature requires a partner product or implementation of a delegated authentication listener.

Note: This feature, which requires integration work, is off by default. Please contact your salesforce.com representative for more information about how to enable this feature.

- **Password Reset** (*All Editions*)
Password resets are a three-step process with the Summer '05 release. First, Salesforce sends the user an email to make sure that the user who owns the email address requested that his/her password be reset. Step two requires the user to click on a link in the email. Step three requires the user to answer the password question that was set when selecting a password.
- **Session Timeout** (*Enterprise Edition Only*)
The session timeout can be increased to eight hours for customers that do not wish to require their users who have been idle for a long period of time to have to re-log in.

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

RELEASE RESOURCES & TRAINING

CRMSUCCESS.COM

CRMSuccess.com is the must-visit site for all the resources and training you need to help you get started with Summer '05 right away. Visit www.crmsuccess.com/summer05 for new feature overviews, training and workshop information, release notes, tip sheets, screen shots, and more. We will be adding new resources to this site in the weeks leading up to the release and after Summer '05 goes live in June, so check back frequently for all the latest resources and training opportunities.

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

SAVE THE DATE

Summer '05 Workshop

Thursday, June 9, 2005

San Francisco

Don't miss our full-day workshop for administrators highlighting the new Summer '05 features. Information on pricing, registration, and other details will be coming soon.

Check the following site in the coming weeks for more details:

www.salesforce.com/trainingsupport/workshops.jsp



Quick Reference Guide Formula Fields

Salesforce Summer '05

© Copyright 2000-2005 salesforce.com, inc. All rights reserved.

Building Formulas

A formula can contain:

- ∴ **Functions**
Predefined calculations that may require input such as **ROUND(number, num_digits)**
- ∴ **Operators**
A symbol that specifies what operation to perform such as + for addition.
- ∴ **Merge fields**
A reference to the value of a field such as `{!Amount}`. Custom merge fields end in “_c” as in `{!Release_date__c}`.
- ∴ **Literal values**
Any number or string of text

ROUND({!Amount}*0.02), 2)

This example uses all the elements above. The ROUND function calculates the output to a whole number. `{!Amount}` references a field; the asterisk (*) multiplies the amount and the literal value of 0.02. The last 2 tells Salesforce to consider two digits when rounding.

Tips on Building Formulas

- 🔒 Only reference fields that are the same type of record as the formula.
- 🔒 Percents are represented as decimals in formulas. 20% is represented as 0.20.
- 🔒 Use the ISPICKVAL function when using picklist fields in a formula.
- 🔒 Do not mix date and date/time fields. Subtracting one date from another returns a number representing the number of days. The same is true for date/time fields.
- 🔒 Quotes in formulas represent literal text. To display quotes in your output, insert a backslash before the quote in your formula.

What is a formula field?

A formula field is a custom field that calculates its value automatically based on the values of other fields or literals. You can add formula fields to most places you can add other custom fields, such as detail pages, list views, reports, and related lists.

The value of a formula field is automatically calculated when a user displays the item that contains it. Formula fields are read only on detail pages and not available on edit pages.

Types of Formula Fields

- ∴ **Currency**
Use formula fields to calculate monetary amounts. For example, **Discounted Amount={!Amount}-({!Amount}*{!Discount_Percent__c})**.
- ∴ **Date**
Use formula fields to determine a date. For example, **TODAY() +5** represents the date five days after today's date.
- ∴ **Date/Time**
Use formula fields to determine a date and time. For example, **Due Date = NOW() +5** returns the date and time five days from the current moment.
- ∴ **Number**
Use formula fields to calculate a number. For example, **NOW()-{!CreatedDate}** represents the number of days since a record was created.
- ∴ **Percent**
Calculate percents using formula fields. For example, **{!NumberOfWonOpportunities} / {!NumberOfOpportunities}** represents your opportunity win rate.
- ∴ **Text**
Displays text. For example, **{!LastName}&{!ISSN__c}**.
- 🔒 Regardless of the formula data type, your formula can contain any type of field depending on the functions you use.

Operators & Functions

OPERATORS

MATH OPERATORS

+	Calculates the sum of two values
-	Calculates the difference between two values
*	Multiplies two values
/	Divides one value into another
^	Raises a number to a power
()	Specifies precedence of calculation

LOGICAL OPERATORS

=, <>	Equals, not equals
<, <=	Less than, less than or equal
>, >=	Greater than, greater than or equal

TEXT OPERATORS

&	Joins (concatenates) two or more text strings
---	---

FUNCTIONS

DATE AND TIME FUNCTIONS

DATE	Returns a date value from year, month, and day numeric values you enter: DATE(year, month, day)
DAY	Returns a day of the month (1-31): DAY(date)
MONTH	Returns a two-digit month (1-12): MONTH(date)
NOW	Returns a date/time for the current moment: NOW()
TODAY	Returns the current date: TODAY()
YEAR	Returns a 4-digit year for a date: YEAR(date)

LOGICAL FUNCTIONS

AND	Returns TRUE if all values are true; FALSE if not: AND(logical1, logical2...)
CASE	Checks for a series of values; when it finds a match, returns the corresponding result for that value: CASE(expression,value1,result1,value2,result2,else_result)
IF	Checks if an expression is true; returns a value if true and another if false: IF(logical_test,value_if_true,value_if_false)
NOT	Negates the value of a logical expression: NOT(logical)
OR	Returns TRUE if any expression is true; returns FALSE if all expressions are false: OR(logical1, logical2,...)

MATH FUNCTIONS

ABS	Returns the absolute value of a number: ABS(number)
CEILING	Rounds a number up: CEILING(number)
EXP	Returns a value for e raised to the power of a number you specify: EXP(number)
FLOOR	Rounds a number down: FLOOR(number)
LN	Returns the natural logarithm of a number: LN(number)
LOG	Returns the base 10 logarithm of a number: LOG(number)
MOD	Returns a remainder after a number is divided by a given divisor: MOD(number, divisor)
ROUND	Rounds a number to a given precision: ROUND(number, num_digits)
SQRT	Returns the positive square root of a number: SQRT(number)

INFORMATIONAL FUNCTIONS

ISNULL	Determines if a value is blank: ISNULL(expression)
NULLVALUE	Determines if a value is blank and, if so, returns a substitute value: NULLVALUE(value, substitution)

TEXT FUNCTIONS

BEGINS	Returns TRUE if text begins with specific characters; else FALSE: BEGINS(text, compare_text)
CONTAINS	Returns TRUE if text contains specific characters; else FALSE: CONTAINS(text, compare_text)
GETSESSIONID	Returns the user's session ID: GETSESSIONID()
HYPERLINK	Creates a URL that is linkable from the specified text: HYPERLINK(url, friendly_name)
ISPICKVAL	Determines if a picklist field is equal to the value you specify: ISPICKVAL(field, text_literal)
LEFT	Returns a specified number of characters from the left of a text string: LEFT(text, num_chars)
LEN	Returns the number of characters in a text string: LEN(text)
MID	Returns the number of characters from the middle of a text string from a given starting position: MID(text, start_num, num_chars)
RIGHT	Returns a specified number of characters from the right of a text string: RIGHT(text, num_chars)
TEXT	Converts a percent, number, or currency field into text: TEXT(value)
TRIM	Removes the spaces before and after a text string, leaving single spaces between words: TRIM(text)
VALUE	Converts a text string to a number: VALUE(text)