

nextview...

The design and tech firm.

Release Paper

SALESFORCE SPRING '20 RELEASE



Contents

3	Introduction
4	Sales Cloud
6	Salesforce Platform
9	Salesforce Einstein
12	Service Cloud
15	Financial Services Cloud
17	Manufacturing Cloud
19	Professional Services & Utilities

INTRO

Huub Waterval
CEO Nextview



Dear Trailblazer,

Dear Trailblazer,

Winter is almost over and spring ('20) is around the corner. We've started 2020 full of excitement for the coming year and we hope the same goes for you.

For 2020 we will continue our industry focus on Financial Services, Professional Services & Utilities and Manufacturing, CPG & High Tech. Besides that, we have increased our investments in Field Service Lighting, Einstein Analytics, Mulesoft and B2B commerce.

After last year's change to entirely focus on Salesforce and Design Thinking we have reshaped our internal organization to bring even higher quality this year. Our organization has been simplified into three teams: the Salesforce Consulting team, the Sales & Marketing team and the Advisory team. In the Advisory team we've embedded our Business Transformation Consultants, Project Managers, Service Designers and Industry Leads. We have seen that good collaboration between these teams results in excellent Salesforce deliveries.

Spring also means that the first Release of Salesforce for 2020 is around the corner. We have decided to continue in the same way of last year and to deliver a Release Paper with the best new features of this release. What makes me most proud is that it's a collaborative document of several internal experts who all shared in their field of expertise.

The kickoff is for Sales Cloud where Maria Karbutova and Niek Bachman highlight new possibilities for opportunity scoring with Einstein that will be available for free in the latest release. Also the fact that Tasks can be assigned to queues will improve the way of working in many of your businesses.

Robert Jan van Erp and Nico Verhagen highlight new features of the Salesforce App, which makes us excited since we also see a shift to mobile in our daily business. The new Flow Builder has got some great updates, one of the new functionalities is that flows can be scheduled.

The Data & Analytics team highlights the story creation in Einstein Analytics where previous steps can be reused like in the Flows and process builders. One of our Official Salesforce Einstein Analytics Champions, Jip Koning, highlights the updates in Direct Data Querying. Due to new features real-time dashboards can be shown even if you surpass the number of scheduled data flows limit.

Stef van den Oever updates you about the WhatsApp integration with Service Cloud, a really exciting feature! Thomas Renkers explains more about the new case merge functionality and Jefrey Schmidt discusses many new functionalities of Field Service Lightning, including the app functionality that has improved to serve field engineers in a better way.

Last but not least, Dico Timmerman, our Industry Lead for Manufacturing, CPG & High Tech tells you more about the Manufacturing Cloud. Manufacturing cloud itself is relatively new and important for those who want to connect their Sales and distribution on one platform. Nikolaj Kiepe our Industry Lead financial services explains more about the new functionalities in the Financial Services Cloud.

In the coming year, you will hear much more from our Industry Leads in blogs, vlogs and reports. They will discuss trends in the market and provide insight in how to be ready for the future in your industry.

I hope you will enjoy reading our third Release Paper and we're always there to improve your business and to unleash your potential. At last, I hope to see you all on the Salesforce Basecamp the 26th of March!

Happy trailblazing,

Huub

SALES CLOUD

Our top new features in Sales Cloud Spring '20

Einstein Opportunity Scoring

In Spring'20 Einstein Opportunity Scoring becomes available for all Sales Cloud users for free.

Let data science and machine learning help you prioritizing your opportunities by analyzing your team's past opportunities to build a scoring model. Opportunity scores show sales reps the likelihood that an opportunity will be won.

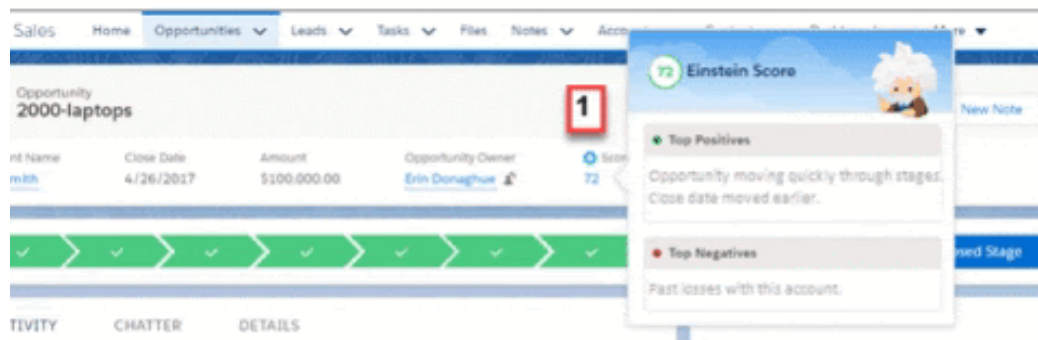
The criteria used in the analysis include each opportunity's and related account's record details, history and related activities. Relevant custom fields and information about the opportunity's owner, such as win rates, are also used to calculate scores.

In Lightning Experience the score is placed on the compact layout and can be added to a list view. If you use collaborative forecasting, it can be added to the opportunity list on the forecasts page.

Einstein reanalyzes the opportunity data and the model is refreshed every 10 days.

We love this feature because it makes a significant contribution to sales productivity!

Opportunity Scoring in Sales Cloud



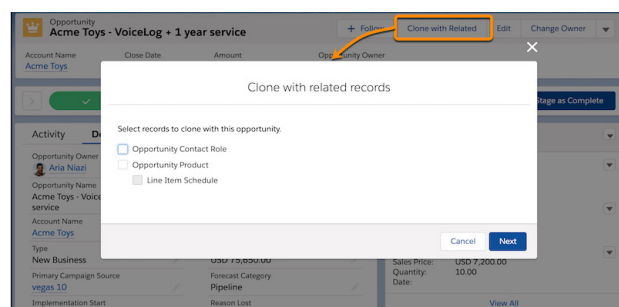
"With Einstein Opportunity Scoring available for free, we see that Salesforce is continuously evolving and investing, making their clouds better and better. This new feature will make your Sales Agents focus on the best potential deals!"

Niek Bachman, Practice Manager Sales Cloud

Clone Opportunities or Campaigns Along with Their Related Records

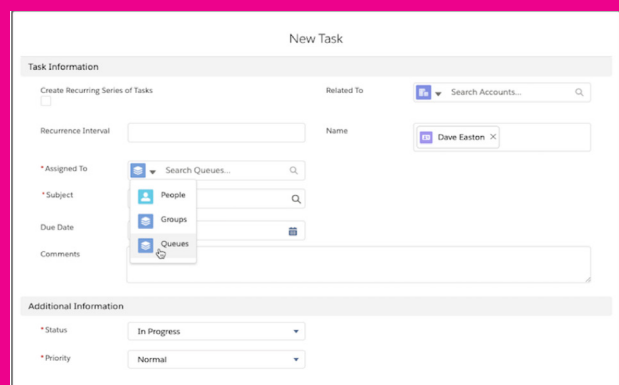
Since Spring '20 we do not need to spend any development time to create a clone function for related Opportunity and Campaign records. Now by clicking the 'Clone with Related' button you will copy contact roles, products, or product (line item) schedules along with an Opportunity and campaign member statuses along with Campaigns.

on how to steer your companies' sales.



Share workload: Assign Tasks to a Queue

New 'Assign Tasks to a Queue' functionality allows assigning tasks to a queue so that it is no longer required to assign it to a particular user. This way when sales reps log into the system, they can see all the tasks assigned to the Queue they are member of, and can start working through them. They can change a task assignee to their own name to show that they are working on it or that this task is completed. In situations when the task is not completed it can be reassigned back to the queue.



Assign tasks to queues

Lightning News: Get News from More Countries

Do you Google what recently happened with the accounts/leads you work with before outreaching to them? Now you can spare some time on additional clicks, because Salesforce brings 'News' functionality to France, Germany, Brazil, Japan, India, and .. read carefully... the Netherlands!

The News component includes articles from the past 30 days, and you can add it to the Home Page and Accounts, Contacts, Leads record pages.



"I am glad to see a number of useful and long-awaited features became available in Spring '20. I believe that new 'Assign Task to a Queue' functionality will significantly increase the productivity of teams as it is no longer required to assign task it to a particular user or create ugly workarounds. But my favorite in the Spring' 20' list is 'Einstein Opportunity Scoring' - greate way to step into a new decade where AI learns, analyzes and feeds you with valuable insights! "

Maria Kurbatova, Sales Cloud Consultant

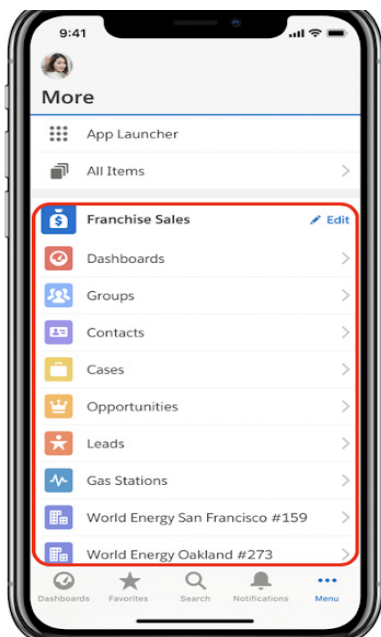
SALESFORCE PLATFORM

Top new Platform Features in Spring '20.

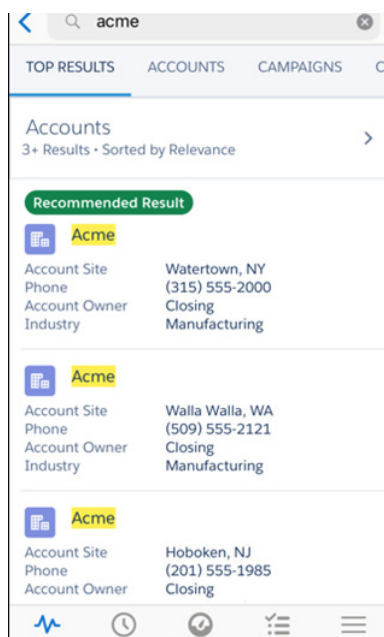
The New Salesforce Mobile App - Automatic upgrade

The new App debuted in Winter '20 and will be activated for all mobile app users (including Lightning and Classic Experience users). Make sure you are on the latest version of the app and you will get the new app automatically. Below the most important improvements and two cool new beta features.

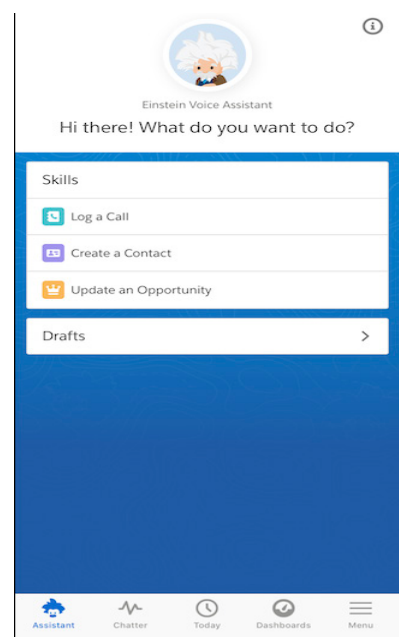
New Mobile Navigation bar and Lightning features



Search Recommended Result (Beta)



Einstein Voice Assistant



Einstein Voice Assistant

Voice Assistant in Beta and can only be used for evaluation purposes. But we are very excited with this new feature because you can ask Einstein to make changes in Salesforce. For example you can log events, create contacts and update opportunities.

Salesforce Data Mask

This new functionality helps to anonymize customer data in your Sandboxes. With this new functionality you can make sure a customer is not personally identifiable in a test environment. You can safely test with your production data without any risk of violating GDPR or leaking of data.

In the printscreen below you can see the 3 options you can choose from:

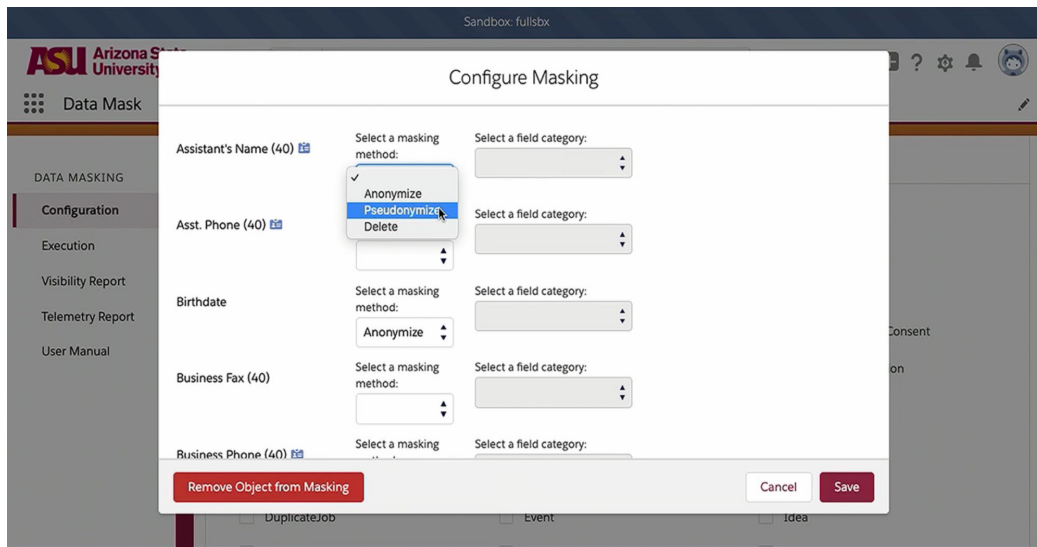
Anonymize - scrambles the field value. For example: Tim Janssen will be: Od2Edse

Pseudonymize - the value will be readable but not related. For example: 06-12345678 becomes: 06-8764321

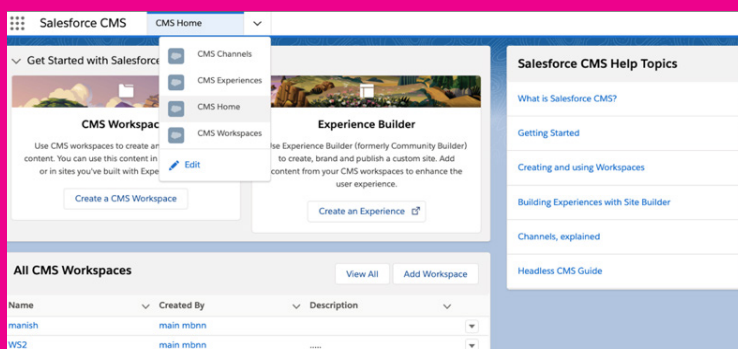
Delete - the value will be removed.

Your admin can configure the Masking setup. This setup will be applied to all the sandboxes that are newly created.

iar interface like other apps people use, making it more intuitive and easy to use. It gives users direct access their favorites, search, and notifications for each app.



Salesforce Data Mask



Salesforce CMS Home

Salesforce CMS Enhancements

Are you using Salesforce CMS to manage all your news updates and do you experience challenges managing the content? You can now get one app where you can manage it all. It's called CMS Home and from this app you can create your content and distribute it to all your channels. Check the video below to get a quick overview of CMS and it's enhancements.

[Video Salesforce CMS](#)



"I'm excited about all the new updates, and our team can't wait to configure them at our clients!"

Nico Verhagen, Practice Manager Salesforce Platform

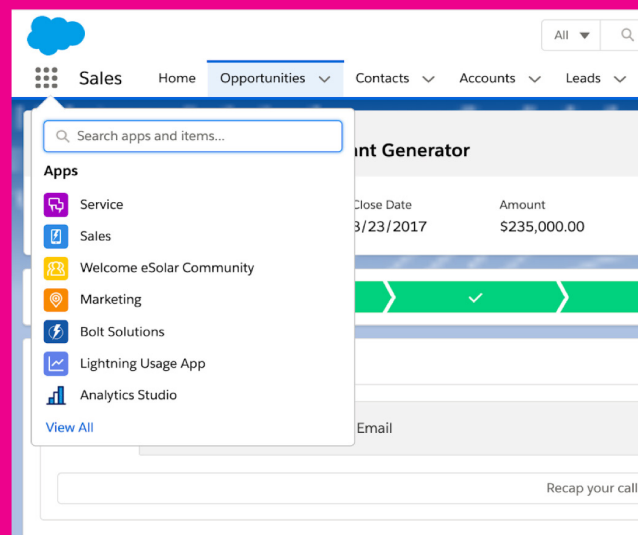
Flow: System Mode & Fast Update (Before Saving Updates)

In the past the answer “that is not possible in Flow, we need a developer for that requirement” was often given. Flow has improved a lot over the last years and now gets two new superpowers:

- System mode - makes it possible to access data that is not “visible” for the user but can be used in the Flow. For example calculation or performing a duplicate check. You don’t have to grant the user access to records or fields that needs to be used in a Flow. The system mode gives the admin the tools only developers had in the past.
- Fast Update - this new way of triggering a Flow will improve the update speed by 10 times compared to a process builder. The trick is that before saving a record the Flow gets triggered and the data only has to be saved once.
- Just like scheduling a meeting, you can now schedule your flows to run at a certain time, recur once, daily, or weekly. No longer does a flow have to start every time a record is saved.

App Launcher Enhancements

Users really love this new feature! Users can easily switch between apps and search all items. When you click on the App Launcher you will see a search bar and your top 7 apps. Just as visualized in the print screen below.



The new App Launcher



"A feature that I really missed in Lightning is to create a new record with default values. For example, create a new opportunity from account and use the account information, 'Account name': Acme, to prefill the 'Opportunity name': Acme - [product name]. In Classic this requirement was easy to implement and luckily, this is now also the case in Lightning! Would you like to know more about this feature or one of the new platform functionalities, please send me a message."

Robert Jan van Erp, Senior Solution Engineer

SALESFORCE EINSTEIN

Our 3 favorite Einstein Analytics trends in Spring '20!

Story creation just got a lot faster!

When reviewing the Spring'20 release notes around Einstein Analytics & Discovery it is easy to notice that Salesforce has put a lot of effort into developing features that enable us to create a story faster, with less effort and without code. That's in line with the new Salesforce approach to kickstart the business scientist in businesses. Business Scientists are "individuals defined by their business acumen and not their comfort with higher math. They are the kind of people who look at business problems and seek to answer the question" (Salesforce Einstein Analytics SVP Ketan Karkhanis)

One of the standard questions that any business scientists working with Einstein Discovery have to answer is: which fields should I include? With spring 20 enhancements it is easy to decide! Users are now able to quickly identify the key drivers even before creating a story.

Working on the story has also become way more efficient. We all know how useful it is to be able to revisit the old versions of the process builder or a flow. We also know how much time and energy can be saved when we are able to assess the previous steps that we took. Now we can keep track of story changes as well. Just open the previous version of your story, learn from it and then use this knowledge to make your next story even better!

That's not all.... There is more! Things are getting even easier when Users want to create a story with a binary outcome, in this case, Salesforce is automatically selecting just the features and variables that are necessary to build the model.

With such tools, we are now more than ready to invite our clients to join Einstein Analytics & Discovery adventure! of your story, learn from it and then use this knowledge to make your next story even better!

FIELD NAME	TYPE	CORRELATION	DATA ALERT
Time To Close MINIMIZE	Number	N/A	
Amount	Number	0.0%	
Total Days Identified Through Quali...	Number	0.9%	
Global Platform	Text	0.0%	
Competitive Situation	Text	0.3%	
Number of People on Opportunity	Text	7.1%	
Sector	Text	2.9%	
Product Name	Text	0.2%	
Resource allocation	Text	3.0%	

Story Settings in Einstein



"I strongly believe that thanks to the improvements in the story creation process our clients can substantially increase efficiency and accuracy of their predictions. Finding an answer to your business question has never been so easy."

Ewa de Vries - Bobicz, Senior Analytics & AI Consultant

Data Catalog

Einstein Analytics' functionality is getting better and better each release and Salesforce is bringing some innovative functions on the AppExchange. At the end of 2019, Salesforce Labs released a new Einstein App, called Einstein Analytics Data Catalog, which is solely built for Einstein Analytics.

This app gives you a visual overview of how your Einstein report objects (apps, dashboard, datasets, lenses, and stories) are built up. There are a couple of possibilities to set up the layout of the report objects.

The tool is very useful for managing and maintaining your reports, dashboards, and datasets. By clicking on a dataset, you can easily get insight into which dashboard and reports the dataset is being used. This way you know which people or departments you need to inform when you need to change or update the dataset or when the dataset has errors.

You can install the application fairly easily. Search for Einstein Analytics Data Catalog on Appexchange and install the application. A custom domain is needed to set this up first. After this set, the Einstein Analytics Data Catalog custom tab "On" on your profile and the app is ready to use.

Einstein Data Catalog



"With the introduction of Einstein Analytics Data Catalog, the traceability of where data is used will be much easier. This will surely contribute to bringing your data management maturity to a higher level"

Ralph Knoops, Senior Analytics & AI Consultant





"Speed is of the essence. And Salesforce is doing everything this Release in Einstein Analytics to speed up the process of going from data to business value. Whether it is creating dashboards, loading data or administration tasks, Salesforce is making things easier and therefore faster"

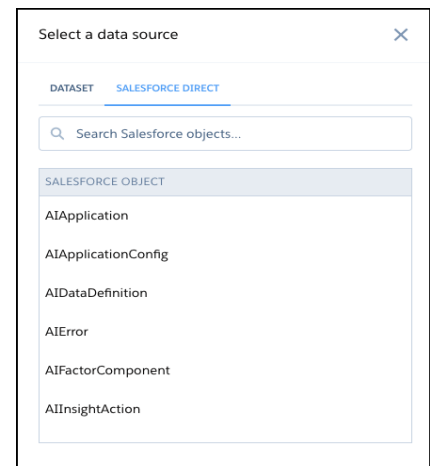
Luuk Martens, Practice Manager Analytics & AI

Direct Data Querying

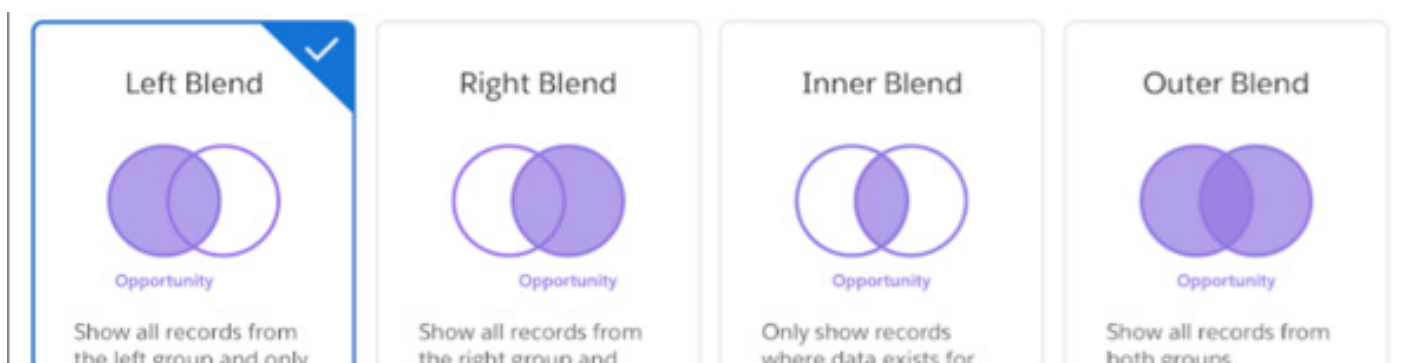
In most data development processes, it will take a significant amount of time and resources to gather and shape your datasets into the way that it's workable.

With the new feature Direct Data Querying, it is no longer needed to enable data sync or use ETL functionality to consume data in the dashboard module. Just use the visual editor to directly connect to Salesforce Objects and select the objects you need (with clicks and without code of course). This is an ideal situation when a real-time dashboard is required and the number of scheduled dataflows isn't enough.

Do you need to combine multiple objects in a real-time modus? With the new data blending functionality, you can join up to 4 objects without any code. Just enable data blending on the Settings page for Analytics in Setup and start creating your dashboard.



Direct Data Querying



"Salesforce is working hard to speed up the Analytics development process by streamlining data accessibility. Real-time connections instead of data replication via ETL processes. Especially for a real-time dashboard that's a large benefit!"

Jip Koning, Data, Analytics & AI Consultant at Nextview and part of the Official Salesforce Einstein Analytics Champion program

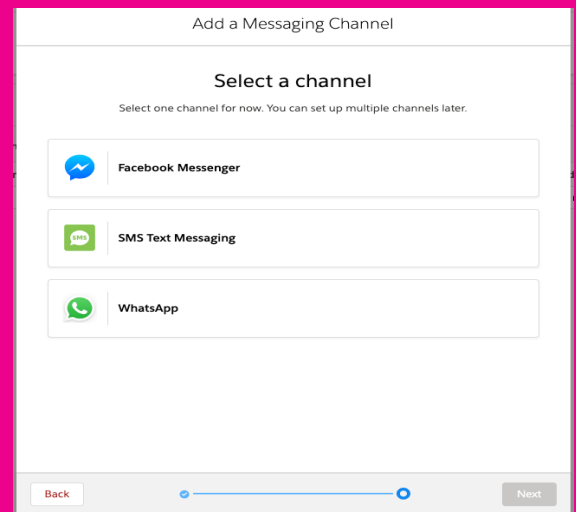
SERVICE CLOUD

Top new Service Cloud Features in Spring '20.

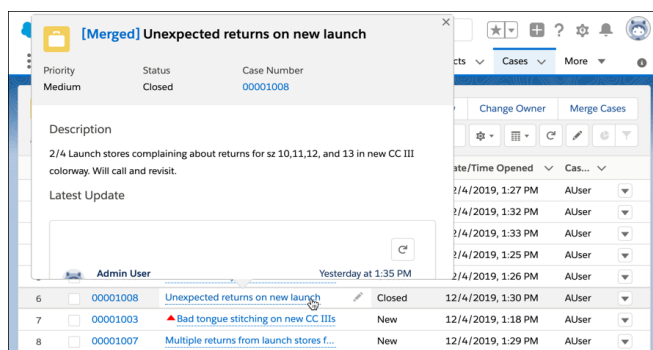
WhatsApp finally lands in Service Cloud

With 1.5bln users worldwide and 11,9 mln, users in the Netherlands WhatsApp has quickly become the most used communication channel in the market.

So it is not hard to understand that your organization can benefit significantly from servicing customers through WhatsApp. After having been in Beta & Pilot for a while, Salesforce's Service Cloud support for WhatsApp channels is now Generally Available! This means that Customer Service Teams are now able to connect with their customers on their favorite channel. A great feature is also that your business can send template notifications to customers such as appointment updates or delivery notifications. Making the customer experience even more personalised and easy for the customer and Customer Support Teams. All this will enable Custom Support teams to combine this powerful communication channel with the productivity boost and customer 360 view in Salesforce Service Cloud.



WhatsApp in Service Cloud



Expanded Account Relationships

Case Merge availability

First off, the Case Merge functionality is now Generally Available to all Service Cloud customers and can be enabled by your admin allowing users to merge duplicate cases. This greatly helps in maintaining a clean Case history for your customers whenever they contact you on a certain case over different channels creating a multitude of Cases. You can set up this functionality to either delete the merged cases or keep them available in the Merged Cases related list.

"Bringing together all communication channels into one platform like Service Cloud as part of an omnichannel strategy is a no-brainer these days. But have you considered bringing these channels together for your customers as well? The new Salesforce Channel Menu allows you to proactively inform your customers on what channels they can engage with your company."

Stef van den Oever, Customer Practice Manager



Case Merge availability, part 2

As Service Agents are known to be dealing many cases at the same time, the Spring '20 release brings additional functionality to view and even edit Cases by simply hovering over a case in a List View. Additionally, as we might remember from our time spent in Salesforce Classic, escalated cases are now clearly marked with a red arrow in all Case List Views.

Closing a Case is often a moment-of-truth for Service Agents and is something that shouldn't be taken lightly. Best practices show that cases should be closed when the customer is actually helped rather than when the Service Agent has dealt with it. For this reason the Spring '20 release introduces the possibility to hide closed Case statuses from the Case Status picklist. This helps to force Agents to go through a formal Case Closing process rather than bypassing this by simply updating the Status picklist.

Field Service Lightning grows in it's capabilities once again

Field Service Lightning has grown to be one of our most favourite Salesforce products over the last years which means that we're closely following its further development. We are happy to see that this release brings a lot of productivity and scheduling optimisation functionalities to the table.

As we have learned in our recent FSL implementations, the success of such deployment is mostly determined by the data model and reference data. We are delighted to see Salesforce expanding their Health Check functionalities to cover FSL-specific setup elements as well. The Health Check easily conducts a sanity check on your FSL setup and shows what you might be able to improve.

Furthermore more functionalities were released making FSL more versatile for other scheduling use cases like having appointments immediately follow each other, assigning work to minimally qualified resources (in an effort to keep your most qualified resources available for more challenging work) and multiple specific optimisation options for Enhanced Optimisation.

And for the Service Engineers in the field the mobile app has been enhanced to better handle saving Service Appointments and related information offline (Offline Priming) and allowing for Global Actions to be used to create records that do not have a direct relationship to the records in use.

Health Check

Compare your configuration against Field Service Lightning best practices to maximize performance. [Learn more about the tests.](#)

General Validations

Horizon Based Validations

Test general settings and configurations that could impact performance.

Results

Show Only Failed Tests

Re-Run All Tests

Critical Tests (2 Tests Failed)

STATUS	CATEGORY	ISSUE DESCRIPTION	YOUR VALUE	RECOMMENDED VALUE	ACTIONS
✖ Failed	Scheduling Policy	Scheduling Policy Without Availability Rule	Found 1 occurrences of the issue	Add a Service Resource Availability work rule.	▼
✖ Failed	Scheduling Policy	Scheduling Policy with Insufficient Work Rules	Found 3 occurrences of the issue	Add more work rules to your scheduling policy.	▼
✔ Compliant	Scheduling Policy	Scheduling Policy Availability Rules Overlap	Found 0 occurrences of the issue	Fix overlapping Service Resource Availability work rules.	▼
✔ Compliant	Permissions Set Validation	Permission Sets are Out of Date	Found 0 occurrences of the issue	Update your permission sets.	▼
✔ Compliant	Remote Sites	Remote Sites are Inactive	All FSL Remote sites are active	Activate remote sites.	▼

Health Check

Compare your configuration against Field Service Lightning best practices to maximize performance. [Learn more about the tests.](#)

General Validations **Horizon Based Validations**

Horizon-based tests validate settings and configuration within a specific timeframe to help troubleshoot performance issues

* Horizon Start
01-Aug-2019

* Horizon End
15-Aug-2019

* Service Territories
Search for the needed Service Territories

San Francisco X Los Angeles X

Include Service Appointments without a territory ☐

* Scheduling Policy
Customer First

Filter services by
None

Run Tests

FSL Health Check



"Having been involved in many Field Service Lightning implementation projects I am happy to see more and more solutions that we needed to customly build in the past are now being added to the standard product. It surely enhances the speed in which we can roll out FSL in the future."

Jefrey Schmidt, Senior Consultant & Field Service Lightning expert



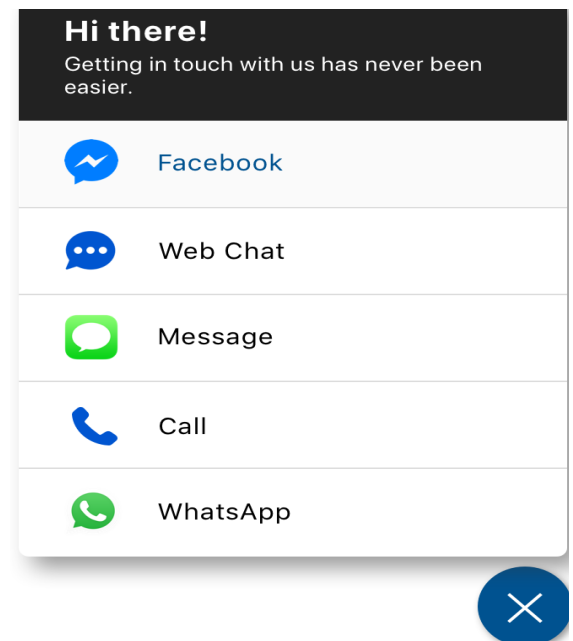
"Helping customers is what Service Agents love doing. The Spring '20 release enables Service Agents to find and store information more quickly and spend more time actually helping the customer."

Thomas Renkers, Senior Service Cloud Consultant

Present all available communication channels to your customers

Customers can now easily start conversations on your website or community by choosing the channel they prefer! The Embedded Channel Menu supports up to six channels and can be easily branded and customized by your admin. Service agents can respond directly from their Service Console.

Supported channels are: Chat, phone, text message, Facebook Messenger, custom URL and WhatsApp.



Omni-channel options in Service Cloud

Become a Salesforce expert!

Do you work with Salesforce on a daily basis, or do you have to in the future? Would you like want to learn more about the release cycle of Salesforce or other Salesforce features. Have a look at www.nextview.nl/academy and check out all the courses we are offering together with our partner Fast Lane!

Salesforce Administration Essentials Training (5-day course)		Administrative Essentials for Experienced Admins in Lightning Experience (ADX-211) (4-day course)	
Declarative Development for Platform App Builders in Lightning Experience (DEX-402) (5-day course)	Programatic Development using Apex and Visuelforce in Lightning Experience (Dex-450) (5-day course)	Essentials for Marketing Cloud Email Marketers (EEB-101) (4-day course)	Getting Started with Journey Builder (JB-101) (1-day course)

Financial Services Cloud

Top new Financial Services Cloud features in Spring '20

Action Plans: copy, paste, adjust, use!

If I had to pick one very useful feature that could have used improvement it was that you could not clone Action Plan templates to create new ones. Nothing is more irritating than constantly having to start creating something from scratch knowing that you really only want to change it a bit. Copy/paste/adjust is just so much quicker! Well; as of Spring '20 this is possible! ... and whilst you're at it you can now also streamline document tracking with a checklist on action plan templates. Could prove to be very useful for processes such as KYC!

- [Create Copies of Action Plan Templates with Deep Cloning](#)
Now you can create an action plan template from an existing template. This feature simplifies template creation when your business process changes by eliminating the need to start from scratch. Users can also use an existing template as a reference to create a different version for their own use.
- [Share Action Plan Templates Using Packaging](#)
With action plan template packaging, you can create an action plan template in one organization and deploy it in a different organization. Create and test an action plan template in a sandbox environment and deploy in production when the template is ready. To use a packaged action plan template, clone the packaged template, make any necessary changes, and then publish it.
- [Associate Document Checklist Items with Action Plan Templates](#)
Action plan templates can now include document checklist items. An action plan template can have tasks, document checklist items, or a combination of both.

Integration: a new Mortgage lending API

Now it is possible to use a new API to connect in a standard way with Mortgage applications. It's not that you could not connect earlier but configuring a standard pre-built api has proven to be easier than building it yourself from scratch.

- [Mortgage for Financial Services Cloud: New Mortgage Lending API, Create Loan Applications from Accounts](#)
Seamlessly connect loan applications in Salesforce to 3rd-party mortgage, point-of-sale, and loan origination systems. The new Mortgage Business API lets you create, update, and query loan application data. Create loan applications from Accounts, with or without related Opportunities.
- [REST API](#) :Financial Services Cloud REST API includes new calls.



"This time a lot of smaller really handy features that will have a very positive impact on your productivity. (like action plan copy,paste, adjust and you're all set to go!...) Check it out!"

Nikolaj Kiepe, Industry Lead Financial Services at Nextview

Usability

This might seem like a small item but for those that are handling customer requests and need information quickly (like on the phone, in a chat, answering an email, ...) it can be quite important: Hover is now enabled on group member components! So now we can hide info and use the hover over to show specific group member information. Sometimes less is only more if the information is quickly available by hovering over it. Also there are some new and changed objects in the Financial Services Cloud that could prove beneficial. Like getting information of a borrower's address by linking to a different system using the new Mortgage Lending API. The fields to do this are now already created; that saves time.

- [Enhanced Usability for Financial Services Cloud](#). You can hide activity rollups on group member and group member-configurable components. Hover is now enabled on group member components. And Financial Services Cloud now supports right-to-left text.
- [Financial Services Cloud Has New and Changed Objects](#). Do more with new and changed Financial Services Cloud objects.

Save the best for last... Life events & Business milestones on Contacts!

To close off there's a small change that I personally really like: it is now possible to use the business milestone and/or life event component on CONTACTS! This is really beneficial for all of your inbound and outbound customer contacts. Important CRM stuff can be noted, changed, talked about quickly and easily. Personally for me this opens a whole new perspective on B2B Marketing and Sales Capabilities that you now can easily use!

- [Develop Deeper Bonds with Producers with the Life Events or Business Milestones Component](#). The Life Events or Business Milestones component is now supported on the Contact record page. With an at-a-glance view of producers' life events, sales managers can know their producers better and build a long-term and mutually beneficial relationship with them.
- [Keep Key Producer Information Handy with Producer Relationship Cards](#). With producer relationship cards, sales managers can get quick and easy access to key producer information from different objects, without going through multiple related lists. On a distributor's record page, sales managers see one card for each producer working with that distributor. On a producer's record page, they see one card for the producer.

Life Events

Edward Birth Dec 6, 1984

Graduated From CB... Aug 16, 2006

Agent With Acme Dec 2, 2019

Person Life Event Job [New]

Agent with Acme

Primary Person	Edward Stamos
Event Date	Dec 2, 2019
Event Type	Job

Agent with Marsh

Primary Person	Edward Stamos
Event Date	Dec 10, 2008
Event Type	Job

Related Details News

We found no potential duplicates of this contact.

Life Events in Financial Services Cloud

Manufacturing Cloud

Top new Manufacturing Cloud features in Spring '20

Action Plans: copy, paste, adjust, use!

General available since October 2019, Manufacturing Cloud enables Manufacturers to connect their Sales and distribution, providing a unified view of rapidly changing customer demand across the entire value chain. Let's first introduce the main features of Manufacturing Cloud

Sales Agreements

"Allow manufacturers to unify their run-rate business with data housed in ERP and order management systems with the contract terms negotiated—including planned volumes and revenues—so both operations and account teams can have a 360-degree view of the customer. If any changes to the agreement are needed, they are immediately incorporated into the existing sales agreement, ensuring there is always a single source of truth. This allows account teams to manage the full sales agreement lifecycle and have visibility into committed and actual order volumes, the performance of the agreement against the forecast and other time-phased custom metrics. This also simplifies the renewal process, ensuring account teams continue to bring in revenue while increasing margins."

In Spring '20 the granularity of the agreements has been deepened to provide more accuracy in the agreements. Also bulk editing is added to make maintenance of the agreements easier. Filtering, searching and adding of products is now available.

"With the 2nd release for Manufacturing Cloud many small enhancements have been introduced to further enable the alignment between Sales and Operations."

Dico Timmerman, Industry Lead Manufacturing, Customer Products & High Tech



Account-Based Forecasting

"Provides manufacturers with a complete view of their current business alongside future opportunities. This allows sales, finance and operations teams to develop more accurate forecasts while breaking down internal silos. Account teams can also add updates on changing customer needs or market demands, allowing the team to collaborate and adjust forecasts in real-time, helping to make business transactions, profits and revenue margins more predictable."

In Spring '20 the following functions have been added:

- Custom Metrics can be defined to match any specifics customers might have while forecasting View forecasts in the currency of the account.
- As part of the launch of Manufacturing Cloud the following features have been delivered as well:
- Einstein Analytics for Manufacturing - a set of KPI's on the health of the account, demand insights, product penetration and sales agreement progress.
- Community Cloud for Manufacturing will deliver a new pre-built template specific for manufacturers that extends sales agreements to channel partners, allowing them to easily collaborate together on leads and opportunities.
- MuleSoft Anypoint Platform unlocks data from any application, data source or device—whether that data is on-premise or in the cloud. By enabling organizations to connect Manufacturing Cloud with other systems, sales and operations leaders can automate the complete order-to-cash process, create a comprehensive forecast view and drive business process automation across all sales channels.

We need you!

Implementing all these new features can't be done without our great consultants and staff. Our continuous growth means that we're hiring. Are you interested in joining a certified Great Place to Work, or would you like to know more? Have a look at our website:

<https://www.nextview.nl/careers/vacancies/> and see if there's something for you!



Professional Services & Utilities

Trends and interesting Spring '20 features for the Professional Services & Utilities Industry

What value is there for customers in Professional Services & Utilities in this latest Spring'20 release?

We summarized a number of interesting features within the following three themes that apply to most Professional Services & Utilities companies:

- Digitizing the business
- Meet changing stakeholder expectations
- Deliver services smarter

Digitizing the business

Digitizing the business is on the agenda of most PS & Utilities organizations. They're looking for technology to engage with customers in new and digital ways. They want to eliminate non-value adding tasks and create scale and reduce cost. Within these Industries, often outside in the field when visiting customer locations or maintaining assets in the field.

All of this should be combined whilst creating a better user experience. Support of employees on mobile devices is often part of this strategy.

Below are a number of examples of how you can super charge your sales, service and field service experts wherever they are. Your people should be empowered to do more on the run and focus on delivering knowledge and service to your customers and minimize effort for administration.

- Einstein Voice Assistant: Get More Done on the Run (Beta)
- Let users make updates to Salesforce—like logging events, creating contacts, and updating opportunities—all by voice. Einstein Voice Skills lets you build custom skills tailored to your users' most common tasks, generating more high-quality Salesforce data to inform decision making.
- Productivity Features: Send Later, List Email Drafts, Email Threading, and Task Queues
Your sales reps are on their way to increased productivity with several new features. They can now schedule an email to arrive at the perfect day and time. And list emails are easier to write now that reps can save a draft and come back to their work. With email threading, reps can see an entire conversation in one place, without getting lost in the replies and side conversations. And your reps can efficiently share work items by assigning tasks to a queue.
- Field Service: Variable Shifts, Consecutive Work, Posts for Generated Work Orders, and Enhancements to the Mobile App. Set up shifts and deliver services when needed, on any day and at any time. Assign appointments back-to-back so there's no interruption. Stay informed when maintenance plans create work orders for your team. And, in the Field Service Mobile app, we added security features and a new offline priming UI to give your users a safer, better experience.



"Customer loyalty in Professional Services and Utilities is often driven by a good customer experience. With this new Spring '20 release, Salesforce delivers multiple features to help provide an even better experience both in the office as in the field."

Pieter Hendrikx, Industry Lead Professional Services & Utilities

Meet changing stakeholder expectations

Whether you are a Professional Services organization that delivers services in house of customers or a Utilities organization that wants to interact with their customers in a more modern way; there is a lot to find in this new release that meets changing stakeholder expectations.

Internal stakeholders might be looking for ways to further drive collaboration between departments to streamline efficiency. Or to be able to respond quicker to customer needs when they need your service. This can be in the office but also to drive collaboration with engineers in the field.

External stakeholders like your customers might expect that you further enable them to connect and interact with them on an even lower effort basis. Think of any-time, any-where and also any-channel or device. Or that you're able to increase your field service capacity on a flexible basis by the use of temporary increase of capacity outside of your standard service hours.

Check a selection of relevant features to meet changing expectations, collaborate even better and work more efficiently.

- [Give Customers a Menu of Conversation Channels \(Generally Available\)](#). Let your customers contact you through channels like chat, Facebook Messenger, phone, or a custom link using a channel menu in your website or help center. You can create a channel menu if you've purchased the Chat & Messaging add-on.
- [Embedded Service for Mobile Apps: Estimated Wait Time \(Beta\), Dark Mode for iOS, and Bug Fixes](#)
When a customer is waiting for an agent, you can show the estimated wait time instead of the queue position. This option is useful when the queue position doesn't effectively represent the wait time for a customer. We made improvements to better support Android 10 and iOS 13. We also support Dark Mode for iOS 13 and zapped a few bugs.
- [Flex Your Field Service Scheduling with Ad Hoc Shifts \(Beta\)](#). With shifts, you can break out of rigid work hours. Define shifts that vary from the usual schedule, such as holiday hours or occasional overtime. Or, to schedule contractors who don't have consistent work hours, you can create shifts for the dates and times when they're available.

Deliver services smarter

Delivering services in a smarter way includes making use of data and turning it into value. Imagine the opportunity when Einstein can make use of your existing data which is built up over the past years and to turn it into smarter and automated services.

The features below can help your customer care department to respond faster and more accurately to customer requests. On top of it, Einstein bots is now available to support Whatsapp in 180 countries as well.

Again great ways to deliver your services even smarter. Check them out below!

- [Help Your Agents Resolve Cases Faster with Einstein Article Recommendations \(Generally Available\)](#)
Einstein Article Recommendations uses data from past cases to identify Knowledge articles that are most likely to help your agents address customer inquiries. Einstein Article Recommendations is generally available this release.
- [Help Your Chat Agents Respond Faster with Einstein Reply Recommendations \(Pilot\)](#)
Einstein Reply Recommendations analyzes data from chat transcripts to create chat replies that address your customers' inquiries. Agents select the most relevant chat reply from a list in the Lightning Service Console as they communicate with customers.
- [WhatsApp: Now Available for Einstein Bots](#). Pack your bot's bags, because Einstein Bots is now available in 180 countries on the world's largest messaging app, WhatsApp. Bots can interface with WhatsApp to deliver messages to your customers, just like they do with SMS or Facebook Messenger. Bots can also use automation to bring complex cases directly to agents, all on WhatsApp.

nextview...

The design and tech firm.

EINDHOVEN

AMSTERDAM



*HIGH TECH CAMPUS 27
5656 AE EINDHOVEN*



*WILLEM FENENGA STRAAT 4C
1096 BN AMSTERDAM*

WWW.NEXTVIEW.NL