nextview...

Release Paper

SALESFORCE SPRING '21 RELEASE

salesforce NAVIGATOR SPECIALIST I — Other CG

salesforce NAVIGATOR SPECIALIST I — Business Services

salesforce NAVIGATOR EXPERT — Manufacturing

salesforce NAVIGATOR EXPERT — Service Cloud

salesforce NAVIGATOR SPECIALIST I — Banking

salesforce NAVIGATOR SPECIALIST I — Insurance

Contents

INTRO

Dear Trailblazer,

Spring is almost around the corner. 2020 has been quite a year in which the entire world focussed on numbers - sad numbers, challenging numbers, hopeful numbers.

In some way it has also been fenomenal, during challenging times we have managed to successfully expand into the German market and to become leading in important industries and competence areas such as Manufacturing, B2B Commerce, CPQ and Field Service, but also in Einstein Analytics where we were also the first to achieve the highest status. I am really proud of our team and the great work that they have been doing for our customers.

With Angélique Werner and Onno Tjeerdsma we welcome two great leaders to our new Management Board of Nextview Consulting. We are now ready to scale and help our European customers in their transition to digital excellence.

We are proud to announce that we continue to onboard new clients remotely through these challenging times. Moreover, our collaboration with Salesforce and Gartner will continue to deliver interesting online webinars in 2021.

On top of that, we have kept ourselves busy with training to stay up-to-date with all the newest products of Salesforce. By doing this, we help grow your business to achieve its objectives better and faster than ever before.

We can definitely say that our business is growing with talent and expertise from places all over the world. To 'Work as friends', also now implies to 'Work with the best'. Once again, we are proud to announce that we are once again certified a Great Place to Work for the 4th year in a row.

Enjoy reading this Spring '21 release paper!

Happy trailblazing,

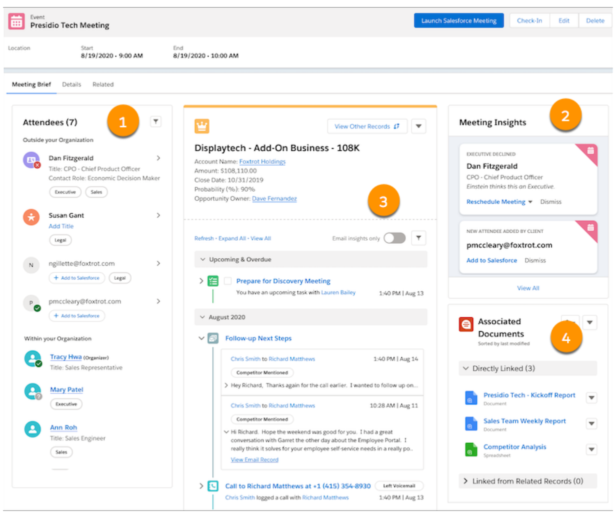
Huub Waterval
CEO Nextview

SALES CLOUD

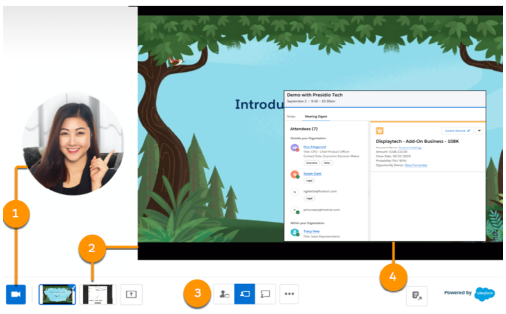
Our top new features in Sales Cloud Spring '21

Salesforce Meetings

With the Meeting digest, part of Salesforce Meetings, your sales reps now have a single page that they can use to gather and share information before a meeting starts. They get insights about who is attending a meeting, reminders about meeting invitation responses and details, plus related record activity. In addition to that, share a meeting experience like no other with Meeting Studio, keeping prospects and customers engaged during virtual events. Sales reps can show their camera view and presentation in the same window to save time and switch smoothly to the content to share next. Besides that, they can also adapt their presentation approach based on visual hints from their participants, see key information from the Meeting Digest that helps them lead and guide the meeting conversation, while taking notes, documenting next steps, and collaborating with their team.



Meeting Digest from Salesforce Meetings



Meetings Studio with Salesforce Meetings

Use Lightning Email Templates in Salesforce Automations

Now you have the chance to use Lightning Email Templates in automations, like workflows, process builder, flows and approvals. For example, you can set up an email alert that sends an email to users about something that's happened, and include a Lightning email template with the email alert. Previously, when you set up an email alert you used Salesforce Classic email templates only.

Email experience enhancements

Users can now see soft bounces from within the activity history. Previously you could only see if there was a hard bounce. A soft bounce is a temporary issue and usually means the person you're trying to email is still at the company, but your email didn't reach them. Now users can make sure emails get delivered with soft bounce email handling

High Velocity Sales

Sales teams can now use Einstein Conversation Insights with video calls, create call collections, and see more information on Conversation Insights dashboards. Managers and reps can use sales cadences with opportunities, deactivate sales cadences, and be more specific about who can change target assignees. High Velocity Sales and its features are available for an extra cost. For pricing details contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

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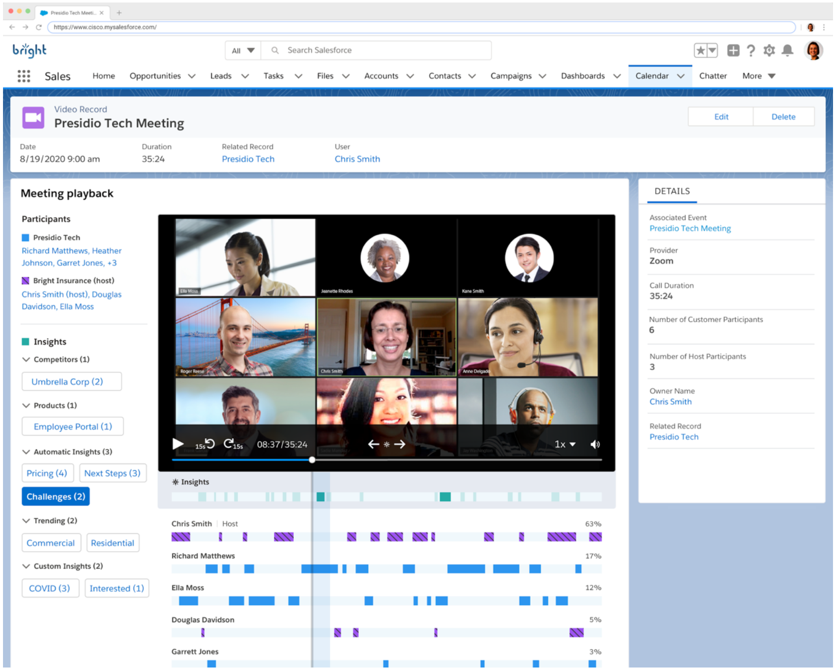
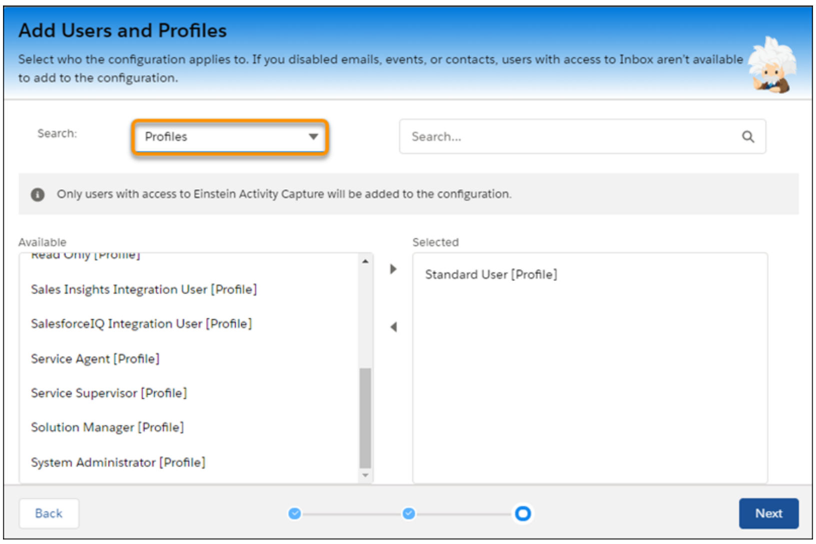


Einstein Activity Capture Improvements

Now users can add Profiles to your various Einstein Activity Capture configurations instead of having to do it user-by-user. Users can now control the field mapping between Contacts and Events as they sync. This lets you control what fields map from Gmail/Outlook to Salesforce.

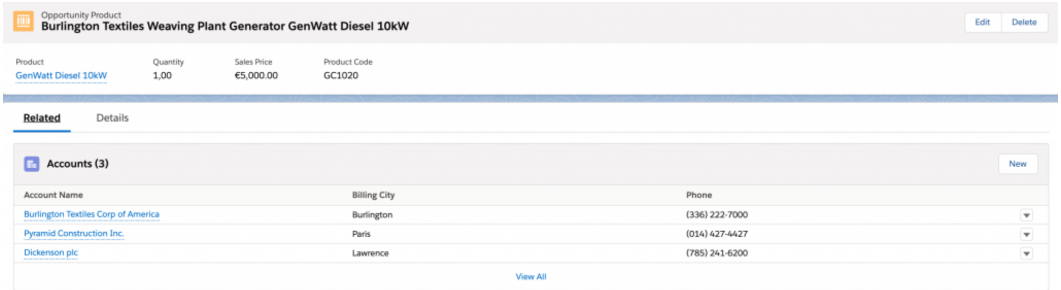


Enable Einstein Opportunity Scoring with Less Data

Now enable Einstein Opportunity Scoring. Einstein takes advantage of a global scoring model that uses anonymous aggregated data to allow everyone to score their opportunities. When you have enough of your own data, Einstein switches to a scoring model built only with that data.

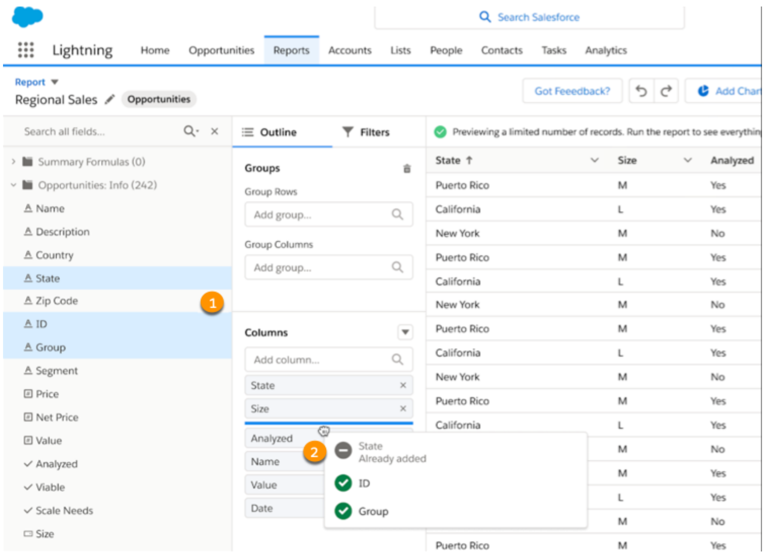
Create a lookup to Opportunity Product

If you need to track the progress of an Opportunity Product on multiple locations e.g accounts, you can simply create a lookup from the Account object, but also this can be done from any standard or custom object. After you fill out the field on the Account, the related list on Opportunity Product will be populated.



Multi-Field Selection in Report Builder

With this new feature you can now drag multiple fields in at a time simply using the Ctrl and Shift keys (or for you Mac users, the Cmd). Build reports even faster!



"*With the Sales cloud spring '21 new functionalities, sales reps can now have more time to focus on real sales while getting their agenda organized with the salesforce meetings, which adds total value to the sales user's experience-especially now in those times where virtual events are paramount.*" - **Nubia Ramos - Pardot Specialist & Salesforce Consultant**

SALESFORCE PLATFORM & MULESOFT

Top new Platform Enhancements
in Spring '21.

Salesforce Flow

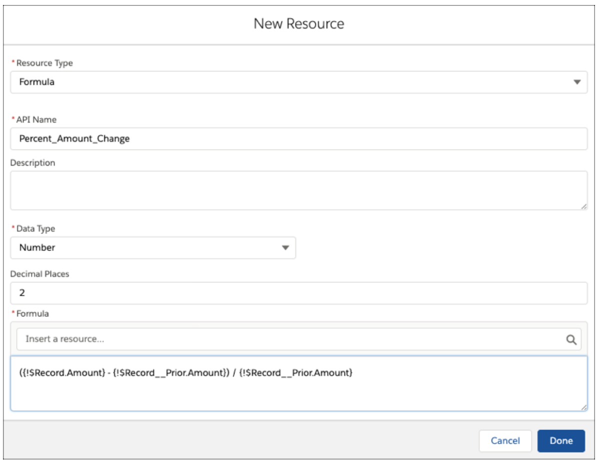
Prior Values in Flow Trigger

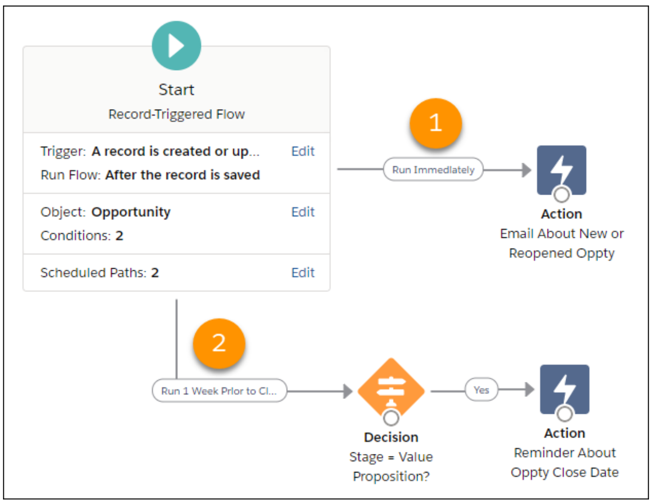
Now when a record is updated, you can access that record's prior values in Salesforce Flow. The $Record__Prior global variable contains the record's values immediately before the flow was run. Use these prior values to check for changes and calculate differences in your flow.

Scheduled path in Flow Trigger

Add a scheduled path to your record-triggered flow if you want part of the flow to run at a dynamically scheduled time after the triggering event occurs. You can base the scheduled time on when the record is created or updated or on a field value in the record. Scheduled paths run in system context, so they have permission to access and modify all data. But the running user associated with the flow's actions is the user who triggered the flow to run.

Why: If you're familiar with scheduled actions in Process Builder or time-dependent actions in workflow rules, know that scheduled paths on record-triggered flows can accomplish the same goals and more.





Multi-column screen (Beta)

You can divide each flow screen into multiple sections and columns to create a visually appealing and effective layout—without touching a single line of code. The multicolumn screen layout is responsive, so columns stack vertically to fit on mobile phones.

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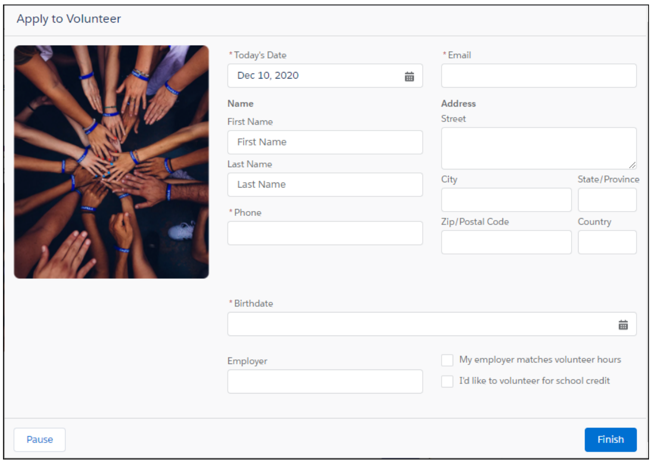


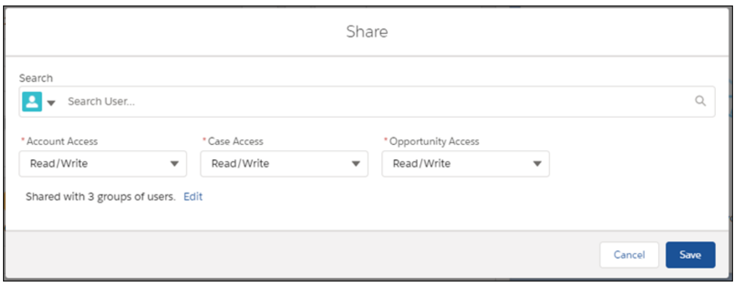
"Salesforce Flow allows admins to create really powerful guided processes that allow a customer-facing employee to have their full attention to their customer instead of their computer screen. The beta functionality for dividing each Flow screen into multiple columns is a big step forward in improving the UX of your Flow solutions to even better facilitate your customers in being customer-centric." - **Stef van den Oever, Customer Practice Manager**

Debug Failed Flows more easily

No more scrolling through a long flow error email to figure out what went wrong during the run. Now you can simply click a link in the error email to open Flow Builder and see the failed flow interview's path on the canvas. The detailed error information appears next to the canvas.

Share Records with Manual Sharing

With manual sharing in Lightning Experience, you now can share records and manage record shares in a new streamlined interface. Previously, you switched to Salesforce Classic to give specific users and user groups access to records. This functionality is available on a rolling basis starting in the Spring '21 release and is available to all customers by February 27, 2021.



"One of the few reasons users still had to switch to Salesforce Classic now and again was the ability to manually share a record with another user. Now it finally has come to lightning!" - **Nico Verhagen, Practice Manager Platform**

Help text character limit

Customers can view the field-level help text by hovering over the Info icon. And with the character limit expanded from 255 to 510, you can now provide more detailed help information. This increase applies to standard and custom fields on detail and edit pages.

Custom Metadata Type Static Methods

Use the Apex getAll(), getInstance(recordId), getInstance(qualifiedApiName), and getInstance(developerName) methods to retrieve information from custom metadata type records faster. These methods don't rely on the SOQL engine and return the sObject details directly from the call.

The following example uses the getAll() method. The custom metadata type named Games has a field called GameType. This example determines if the field value of the first record is equal to the string PC.

```
List<Games__mdt> mcs = Games__mdt.getall().values();
boolean textField = null;
if (mcs[0].GameType__c == 'PC') {
   textField = true;
}
system.assertEquals(textField, true);
```

API - SOQL

SOQL now makes it easy to include predefined groupings of fields within a query statement using the new FIELDS() function. Available in v51.0 and later.

Why: In previous versions of SOQL, retrieving fields meant specifying all the names of all the fields you wanted to retrieve. Typically, this required first making an API call to describe the object to get the list of fields (or using the Object Manger) and then laboriously constructing a SOQL query to select all those fields. Further, such a query could exceed the query character limit for large complex queries that retrieve lots of data. The new FIELDS() function lets you select all the fields without knowing their names in advance. This eliminates the need for a round-trip to the server to prepare a SOQL statement, eliminates the need for research and a lot of typing, simplifies query statements, and makes it much easier to explore the shape of your objects.

How: Use FIELDS(ALL), FIELDS(STANDARD), or FIELDS(CUSTOM) in your SELECT statements. For more information, see FIELDS() in the SOQL and SOSL Reference.

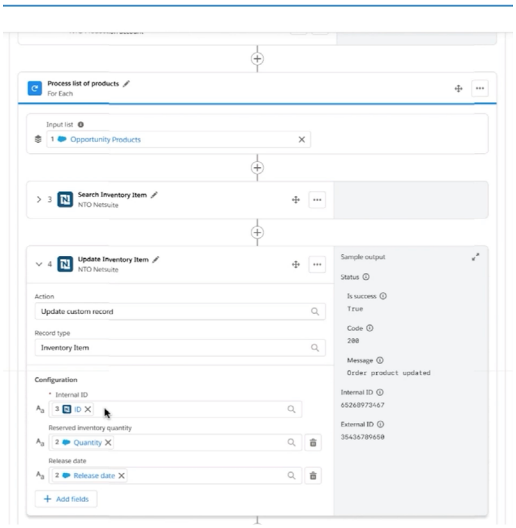
"No more SOQL needed to get the data from a custom metadata. Just use the static methods & it will save the number of SOQL you can have in a single transaction!"- **Ishwar Kabra, Senior Salesforce Consultant**

Mulesoft Features in Spring '21

Mulesoft is the Integration and API Platform of Salesforce. Although Mulesoft follows a different release calendar than Salesforce, Mulesoft does regularly release exciting new features. In this update we highlight a few new features.

Mulesoft Composer

One of the most exciting new developments is the Mulesoft Composer for Salesforce, a no-code, integration product that enables non-developers to connect apps and data to Salesforce and automate integrations quickly and easily with clicks, not code — all inside of the Salesforce UI.



The initial release (which is planned to be GA any day now) is embedded directly into Salesforce and offers a set of pre-built connectors & templates. Why is this exciting? As it removes the barrier that a developer is always needed to build integration. And because the pre-built content increases the efficiency.

Initially Mulesoft Composer will primarily target Sales Cloud, Service Cloud, and Tableau. However, the plan is that additional connectors will continue to be added every 2-4 weeks. On the roadmap we also see the launch of Composer with Anypoint Platform that will provide more tools for seamless collaboration between citizen integrators and special-ists.

Salesforce B2C Commerce Cloud & other new connectors

Mulesoft has released the new Salesforce B2C Commerce Cloud Connector to save IT teams development time with faster integrations to and from Commerce Cloud. The connector facilitates integrations in typical commerce scenarios around products, product catalogs, promotions, orders etc.

Besides the Salesforce B2C Commerce Cloud connectors Mulesoft further expands the base of available connectors, among others, with connectors for Azure Data Lake Storage, Automation Anywhere RPA Bots, Jira and Oracle HCM Cloud Connector.

SALESFORCE DATA HUB

Our 3 favorite Tableau CRM trends in Spring '21!

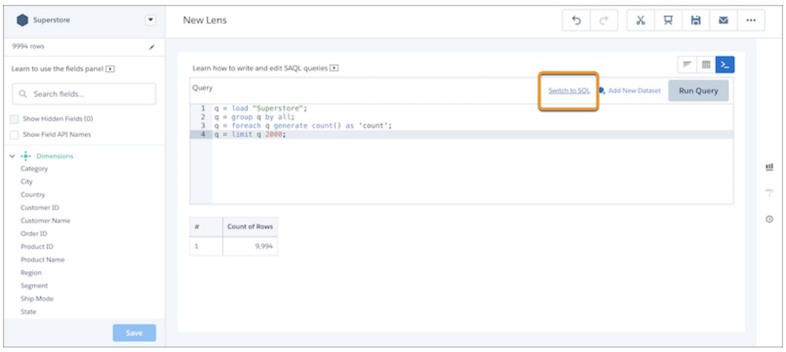
We are not looking forward to the new Spring 21' release for Einstein Analytics?! No! We are looking forward to the new Spring 21' release for Tableau CRM! From now on Einstein Analytics will be known as **Tableau CRM**.

This move makes a lot of sense for Salesforce and the products. The two technologies (Tableau suite & Tableau CRM) are moving closer and closer together, while reserving the "Einstein" brand for all the smart features in the whole Salesforce platform including Tableau. In this release we are seeing a lot of awesome features that you may have been already asking for! Although some of them are in Beta, they are just too cool not to mention! For instance, there are new ways to interact as users and as developers (UI improvements, SQL), new features in Salesforce style (clustering & time-series) and again even further integration into the Salesforce platform (distribute predictions) and with Tableau. We picked a couple of them to highlight why we are enthusiastic about them.

"In every Digital transformation project, Data/Analytics should be treated as a key component. It is too often that Business Application implementations do not meet their desired goal because Analytics was seen as a separate roadmap item for the future, rather than the foundation of your success. The way Salesforce is making Tableau CRM work together with the standard clouds will make it easier to have Tableau CRM as part of your MVP." - **Luuk Martens, Practice Manager Data & Analytics**

SOQL... SAQL... SQL! (Beta)

Salesforce has announced a long awaited feature: SQL for Tableau CRM! It will be available soon for live datasets in Tableau CRM. Don't get us wrong, we love SAQL. However, while SAQL allows for great customization of your dashboards, not many people are as skilled in it as they like to be. SQL on the other hand, is a much more widespread skill. This new feature opens up further customizations in Tableau CRM to a whole new group of potential super-users. Adopting Tableau CRM in your organization will be much easier now!



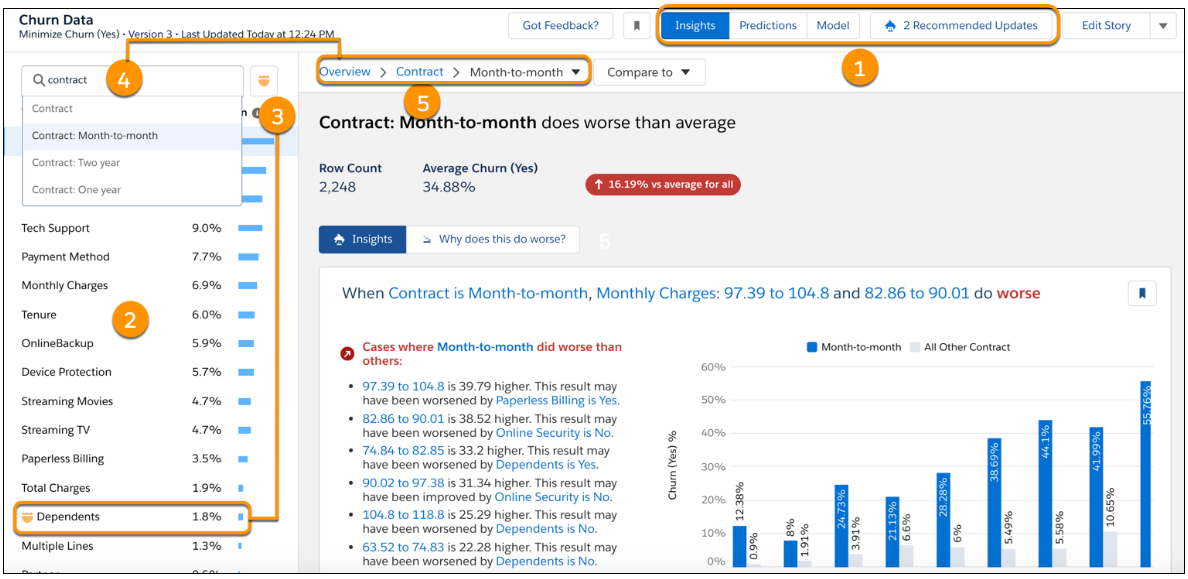
The ability to use SQL in your lenses has native support of Salesforce features used in Tableau CRM such as sharing inheritance. But be carefull! Once you've switched to SQL in an existing lense, your SAQL disappears. So make sure you save a copy!

Discover More Insights with a Reimagined, Intuitive Interface

Chances are high you have heard about Einstein Discovery before. We often compare it with having your personal data scientist who is always available to shift through your pile of data to find important patterns and make accurate predictions. Within a matter of clicks, users are able to understand what happened, why it happened, and what to do next. Einstein Discovery is 100% suitable for business users who don't have experience with building sophisticated data models.

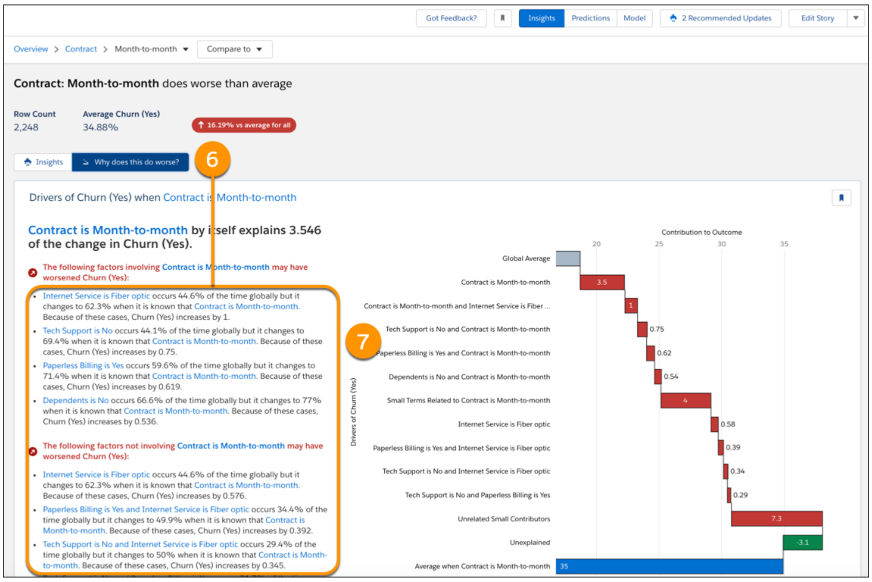
As of the Spring Release '21, a brand new reimagined, intuitive interface is launched that helps you understand and navigate through insights and model metrics nearly effortlessly. While Einstein Discovery continues to offer the powerful features you're used to, it has now become way easier to answer your business question right away! The streamlined story interface makes your insights more discoverable than ever, with features such as comparing story versions at a glance, revealing potentially overlooked insights. Let's walk through the changes quickly.

With the updated story header (1), you easily navigate through the details that are most relevant to you. The variables that are analysed by Einstein Discovery are ordered by correlation and presented in a straightforward manner on the left (2). View potential sources of bias in your story on the spot by clicking on the shield icon (3). Use the dropdown menus (4) to surface insights by variable or value, which automatically reveals more insights that you can open using the breadcrumb trail (5). This way you make sure you easily find your way through all the insights that Einstein Discovery has to offer.



"The more intuitive interface will help you understand what is going on in your organisation faster than ever. Spend less time on finding and navigating through the insights - more on actionable follow-up that really improves your organisation." - **Teun Gilissen, Consultant Data & Analytics**

Insights generated by Einstein Discovery are now easier to locate and context-sensitive (6). Easily navigate to items that draw your attention by clicking the interactive links within the Insight cards (7).



Find New Ways to Segment Your Data with Clustering in Tableau CRM (Pilot)

Clustering is a Machine learning technique that aims to classify records that have comparable properties and/or features. In the new spring '21 release, Salesforce made automated clustering easily accessible without the need for writing complex code or worrying about performance and deployment. Automated clustering is now available in the same place where the rest of data is prepared and can be added as a Transform node in a Data Prep recipe.

Clustering can be used to enrich your data, find abnormalities or just compare data points within similar groups. Clusters can help you identify groups of customers, cases, products or services. For example, customers can be divided into a number of clusters based on their country, industry or number of employees.

Account Cluster	Account Name	Number of Employees	Annual Revenue	Industry ↓	Rating
Cluster 1	US Wirefree	112,327	1,350,000,000	Utilities	Hot
Cluster 1	Tru Vue	71,721	1,110,000,000	Utilities	Cool
Cluster 1	Softura	100,997	1,500,000,000	Utilities	Hot
Cluster 1	Bbk Holding Company	103,478	1,440,000,000	Utilities	Warm
Cluster 2	Internap	38	5,150,000,000	Utilities	Warm
Cluster 2	Vertical Venture DOT Co	153	5,030,000,000	Utilities	Hot
Cluster 2	Digicon Imaging	61	6,530,000,000	Utilities	Warm
Cluster 2	Springer-Miller Systems	8,986	8,630,000,000	Utilities	Cool

If you are struggling with data quality, both clustering as the feature for Predicting missing values are really valuable as well. Don't forget to register for the Smart Transform Pilot Program if you want to check out this feature already!

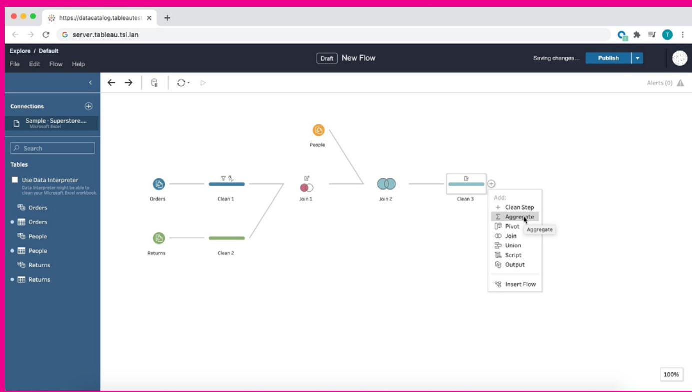
"Automated clustering within your data transformation process is a great example BI combined with AI - the cornerstone of Tableau CRM."
- Jip Koning - Senior Consultant Data & Analytics and part of the global Salesforce Analytics Champion program

Tableau

Last december Tableau released their 2020.4 version. It contained major updates for Tableau Prep and Tableau Online. Next to that, as mentioned in our previous release paper we are seeing increased integration with Salesforce as time goes on.

The Tableau Prep capabilities are now available on Tableau Server and Tableau Online. We can now create and adjust our data flows directly in the web browser. This is a major update as all of Tableau's products are now available through the web.

Tableau Online now allows you to create data extracts from your data sources without leaving the browser. This can help you in increasing the performance of your workbook while you are Web authoring. Next to that, the Tableau Online dev team released a new feature where the Analytics Extensions are now also available in Tableau Online. This means that you can pass expressions to extensions for integrations with R, Python, or other custom APIs for more advanced analysis.

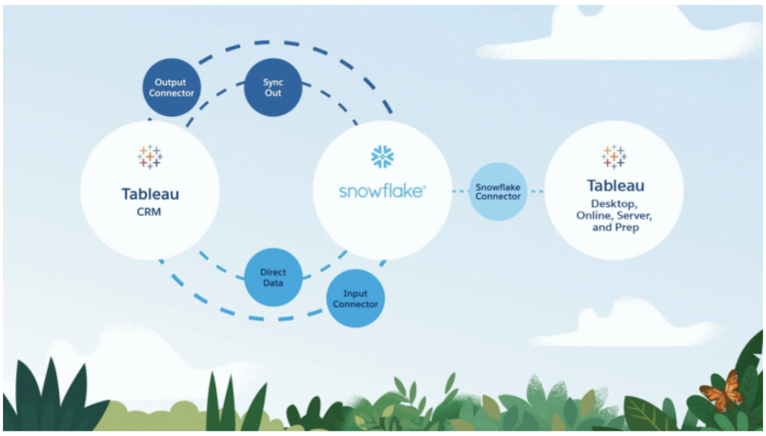


"These updates signal Tableau's focus on improving the web experience. With a lot of people working from home, access to the whole ecosystem of Tableau through the web is an important development. We can expect more features for Web authoring in the near future!" - **Darren Aletoe, Consultant Data & Analytics**

Snowflake

Connectivity Snowflake and Salesforce Tableau (CRM)

Last year a lot of positive things happened on the integration side between Snowflake and Salesforce Tableau CRM. With these connectors Snowflake and Tableau are working great delivering data to both platforms.



It can be a bit overwhelming, here is a quick overview of the different possibilities.

Input Connector (Snowflake to Tableau CRM)

Tableau CRM's most used connector for retrieving data from a data source like Salesforce and Snowflake*. Schedule data loads for a given time interval (for example daily or multiple times a day) to get the latest data from Snowflake (or any other data source) into Tableau CRM.
*https://help.salesforce.com/articleView?id=sf.bi_integrate_connectors_remote.htm&type=5

Direct Data (Snowflake to Tableau CRM)

You can explore your data in a Snowflake warehouse without loading data into Tableau CRM or preparing it in datasets. With the Direct Data connections in Tableau CRM you can run plain SQL queries on Snowflake in real time. You can also build dashboard charts and tables based on the queries you run on Snowflake data. Take advantage of Snowflake's native support on semi-structured and unstructured data.

Output Connector (Tableau CRM to Snowflake)

Tableau CRM connectors allow you to write the outcome of a recipe to an external system for further analysis, business automation, and storage. After you configure an output connector to the data source (Snowflake), create a recipe using Data Prep. Add an Output node to the recipe, select the Output connection, and choose the Snowflake table name from the list of objects. When the recipe runs, Tableau CRM writes the output dataset to the selected table. When you run the recipe again, the data previously written is deleted and the new data is written.

Sync Out (Tableau CRM to Snowflake)

Sync Out for Snowflake exports your raw local Salesforce data via Tableau CRM to Snowflake using the Tableau CRM output connector for Snowflake. With Sync Out for Snowflake, keep your Salesforce data in Snowflake up to date using scheduled Data Sync without the need for a third-party ETL tool.
Fresh Salesforce data is vital if you maintain a central Snowflake data lake for processing, analysis, business automation, or storage.

Snowflake Data Summit, unstructured data and more

End of last year Snowflake hosted their Global (Digital) Event called Data Cloud Summit. Snowflake showcases a lot of interesting new features, customer cases, industry solutions and many more interesting sessions. You still have the opportunity to rewatch these sessions on: https://www.snowflake.com/data-cloud-summit/

Snowflake for Industries

Upcoming march Snowflake is hosting industry events, which cover industry specific solutions, customer cases to help you empower your data strategy. You can sign-up for these events on https://www.snowflake.com/the-data-cloud-tour-emea/

"With the current set of Salesforce Tableau (CRM) and Snowflake connectors, they now provide a high level of interoperability in which you can cover all kinds of data use cases like realtime reporting & dashboarding, Artificial Intelligence & Machine Learning." - **Ralph Knoops - Senior Consultant Data & Analytics**

FINANCIAL SERVICES CLOUD

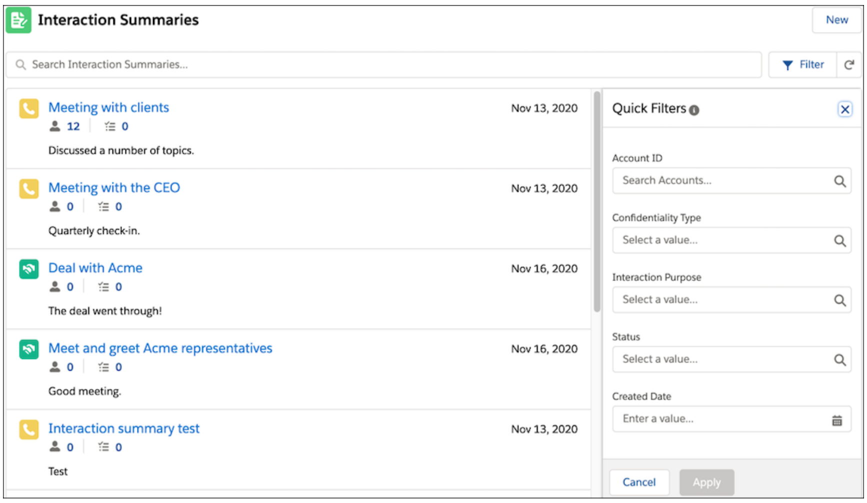
Top new Financial Services Cloud Features in Spring '21!

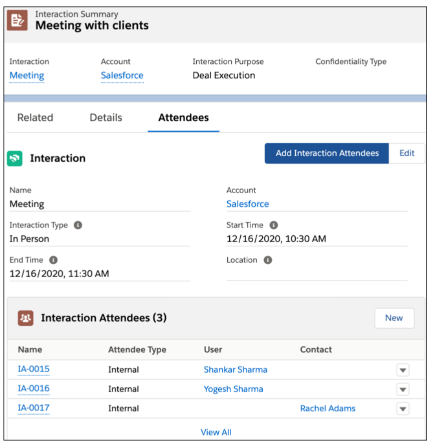
Compliant Data Sharing

This feature was already generally available in the last release helping companies to improve compliance with data sharing regulations and company policies.

In this release you can get one step further by creating participant groups to share a record with a group of users without having to create individual participant records for each team member. You just need to create a participant group from Setup -> Participant Groups and Add Menbers to the group you created!

What is more, participants that are not owners with only edit access to a record, can now share it with other relevant members, while interaction summaries can only be shared with relevant shareholders for better collaboration. You just need to enable interaction summaries from Setup in your org and add the Interaction Summaries Lightning component to the home or account page so that you can create interaction summaries linked with interactions.





You can also add the Interaction Attendees Lightning component to the interaction summary or interaction page, so that you can see and add attendees.

Rollups for Financial Services

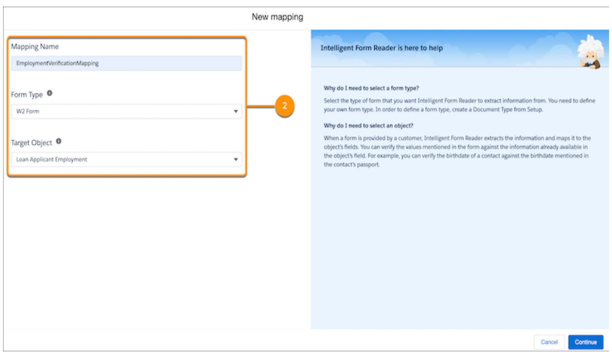
We can all agree that the rollups in the Financial Services Cloud can be quite complicated. This release makes it a bit easier with faster calculations with Data Processing Engine and the Record Rollup Optimization.

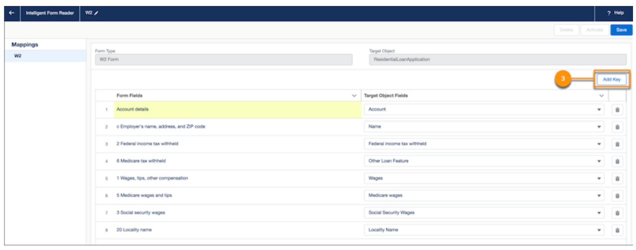
The new RBL (=Rollup-by-Lookup) framework lets you convert your existing RBL rules into Data Processing Engine definitions which can significantly reduce the processing time to aggregate financial information. In this Data Processing Engine, you have greater flexibility when defining or modifying RBL rules. You can enable the new RBL framework and the Rollup Optimization from the Setup -> Financial Services General Settings.

"With the new Spring '21 release Salesforce makes the powerful function of Rollups way easier! This way giving agents insights into the financial position of their customers can be configured in a quick but flexible way" - **Chara Paschalidi, Sr. Consultant at Nextview**

Intelligent Form Reader

This new feature allows users to copy field data from scanned, uploaded files. You need to set up mapping templates for common document types and use the Intelligent Form Reader to recognize and copy important data from uploaded files. More specifically, you need to identify the fields that contain the information you need to capture when a document is uploaded and create mapping for them. Then the Reader extracts the information and stores it in the mapping fields.

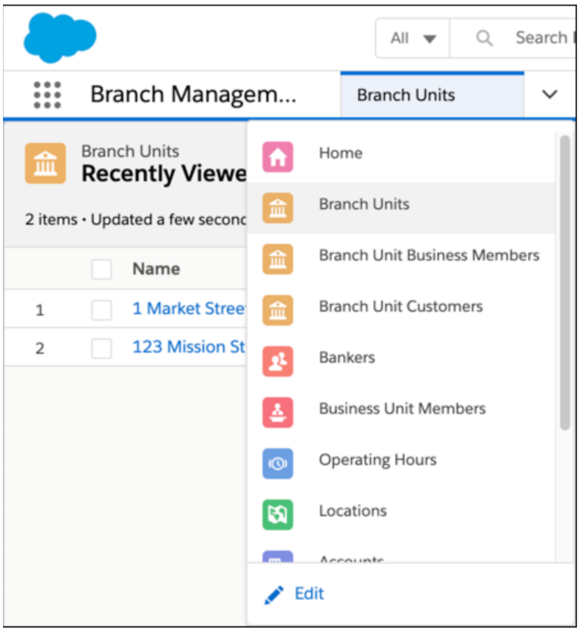




"My favorite part of the spring '21 release is the Intelligent Form Reader. This will have a significant impact on all paper documents that your customers share with you. I can already imagine the efficiency gain we can implement for you in those traditional paper trailed customer processes that we deal with."- **Nikolaj Kiepe, Industry Lead Financial Services at Nextview**

Branch Management

"A chain is only as strong as its weakest link" this old, well known proverb is also applicable to the Financial Industry." If one of the branches underperforms the whole organization is exposed. But don't worry with the Spring 21 release Salescore introduced the Branch Management feature. You can now gain more insights about branch performance and productivity. Manage branches, their staff and customers in a totally new way! The Branch Management data model lets you create branch hierarchies, assign your employees to specific branches and link these branches with customers and other relevant records. All of this (and more) can be done using the The Branch Management Console. Imagine, managing all of the branch information from a single place! Isn't that great? Just let users use the new Branch Selector to define the branch unit they're working with and the Salesforce admin will do the rest. Of course it is not enough just to register data. Branch Management dashboard in the Analytics for Retail Banking app helps you transform your data into important insights that will help you understand how the different branches are performing, where the opportunity lies, and how to minimise potential risks. Now you can quickly find the weakest link in your organisation and undertake the necessary actions to improve its performance!



"Currently financial organisations are facing many challenges. The threat becomes even bigger if an organization has multiple branches that have to be managed and monitored. The Branch Management feature gives an organisation possibility to quickly identify potential organisational risks and indicate area of improvement. This is exactly what the management team needs to survive the current storm and be prepared for any other storms that are yet to come." - **Ewa de Vries - Senior Salesforce Consultant**

MANUFACTURING CLOUD

Top new Manufacturing Cloud Features in Spring '21.

Developed to support and enhance the Sales & Operations Planning (S&OP) process, Manufacturing Cloud is built on the Accounts & Opportunities objects, while extending the existing Sales Cloud forecast functionality for Manufacturing specific purposes.

In the Spring'21 release for Manufacturing Cloud, the majority of the new features and functions are around Rebate Management and Loyalty Management. Another important thing in this release is not a feature or a function, it is the introduction of the Customer 360 Guide for Discrete Manufacturing. Next to these two bigger release items there are couple of smaller, yet very handy, updates to the Sales Agreements and Account Based forecasting.

Rebate Management

In the Winter'21 Release, Rebate Management was introduced for the first time. It is about the set up, managing and monitoring of Rebate Programs, Point in time payout calculations and Intelligent rebates. In this Spring'21 Release Salesforce added to that:

- Define Rebate Programs to Easily Calculate Rebate Amounts
- Gain New Insights with Enhanced Rebate Processing
- Increase Sales and Partner Collaboration on Rebates
- Analyze Rebate Programs and Boost Your Business with Rebate Analytics

Loyalty Management

Loyalty Management was released as a standalone product earlier this year as well. With a broad range of functionality for both B2C and B2B, the Manufacturing Industry is supported through Loyalty Management by motivating channel partners, retailers, and distributor networks to achieve success. It gives their channel members a chance to earn behavioral rewards and business volume incentives through a connected loyalty ecosystem.

Customer 360 Guide for Discrete Manufacturing

The Customer 360 Guide explores Salesforce cross-cloud architecture for discrete manufacturers. The assets in the Customer 360 Guide help you build the future of your manufacturing business and implement changes to fully realize your digital transformation. The guide brings together assets for c-suite executives, line-of-business leaders, architects, and developers to drive digital transformation and engage with partners. The guide includes five complete solution kits.

Sales Agreement & Account Based Forecasting

With the Sales Agreements and Account Based Forecasting at the heart of Manufacturing Cloud, Salesforce has further enhanced the functionality of these:

- Convert Quotes and Opportunities to Sales Agreements
- Consider Opportunity Schedules in Account Forecasting
- Unclutter Your Sales Agreements List

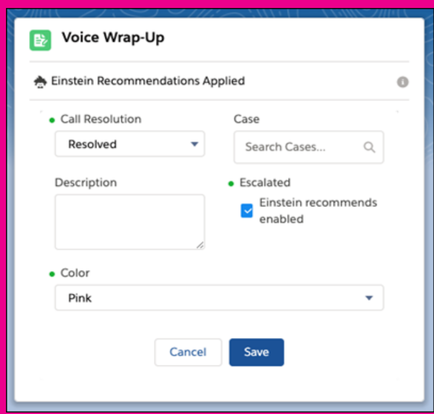
SERVICE CLOUD & FIELD SERVICE LIGHTNING

Top new Service Cloud & FSL Features in Spring '21

Einstein learns to work with the unexpected and makes the voice channel likeable again

The Spring '21 release brings several improvements to the Einstein AI tools for Service Cloud. First off, Einstein Bot gets better error handling capabilities. As we have learned, a good Einstein Bot develops over time while facing actual customers. But what happens if the bot simply does not know how to deal with a certain request from a chatting customer? The Spring '21 release allows for certain system dialogs to be classified as 'Error Handler' in an effort to provide transparency to the chatting customer that something went wrong in the bot's logic and they will perhaps better be supported by a human agent. Customers appreciate your efforts in utilising AI and automation, but still like bots that do not pretend to be know-it-alls.

Another powerful feature being available in pilot in the Spring '21 release is Einstein Voice Wrap-up. This is a powerful tool that helps agents more effectively wrap-up phone calls through Service Cloud Voice. Rather than functioning as an internal survey for summarizing what was discussed during the call, Einstein reads through your automatically generated call transcription and uses its models to predict the different field values required to summarise the call.



Einstein voice

"For a while now I've seen many Customer Service teams trying to divert customers away from the phone channel to other, more structured, channels. Nevertheless, voice still remains a powerful channel in terms of building valuable customer relationships. I'm excited to see Salesforce taking their role in making the voice channel great again!" - **Stef van den Oever, Customer Practice Manager**

Optimised maintenance plans, scheduling and more for Salesforce Field Service

Spring '21 brings some great new and improved Field Service functionalities. This release contains new functionality around Asset Management, Maintenance Plans, Product Consumed, Scheduling and off-line mobile data. These improvements and new functionality will certainly enhance the Field Service Solutions at our customers.

Maintenance Plan: Advanced Maintenance Recurrence

This functionality enables more flexibility in combining different types of work on the customer assets. For example: Advanced Maintenance Recurrence will help you to create a Maintenance Plan for a quarterly Maintenance Cycle on your Asset in which different tasks (Work Order Line Items) are performed. While once a year this maintenance cycle is extended with some additional tasks.

With this functionality it becomes easy to combine different types of work with different cycles within the same appointment. This functionality will help service organisation servicing complex Assets which require multiple service tasks with different cycles, to create more efficient schedules.

Asset Management

Salesforce Field Service further improves its B2B business model. Within the B2B business model there is a distinction between Customer Account, Service Account and Billing Account. In Spring '21 Salesforce enhances the Asset. Service Managers can now see which account supplies and services an Asset.

Products Consumed: Pricing

Pricing the consumed products has been a topic in many implementations. Prices and discounts differ depending on the Service Contract, Warranty or other characteristics. In Spring '21 Salesforce offers more insights in pricing details.

Scheduling: Point to Point Predictive Routing

The most used Scheduling Policy is to minimise travel time. The Street Level Routing (SLR) functionality was already a huge improvement. Routing has now improved even further by point-to-point predictive routing. SLR used a grid of 200 meters, giving all service appointments within that square the some geo location, Point-to-Point Predictive routing uses the exact Service Appointment location and considers the time of day. This will further enhance and improve the estimated travel time and thus create a better optimized schedule.

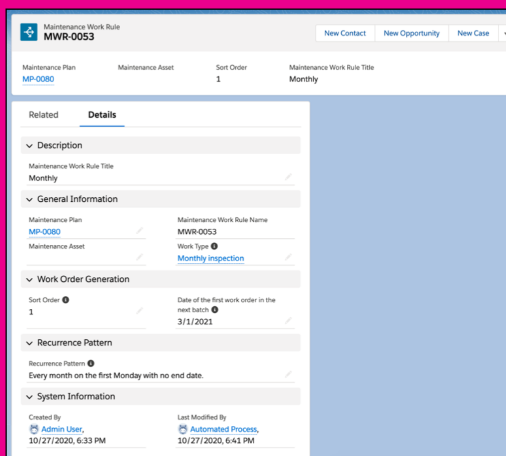
Scheduling: Improved Optimization Insight

Optimization is a powerful tool for efficient dispatching of service appointments according to the defined Scheduling Policy. However the results are sometimes not as straightforward as expected. The optimization engine sometimes seems to be a blackbox which is difficult to tune and calibrate. The Improved Optimization Insights shows you how optimization affects your KPI's by showing metrics before and after the optimization run. With these metrics and new Health Check Component you are empowered to tune and calibrate your Scheduling Policy, Service Territory and Service Resources in pursuit of hitting your scheduling targets.

Making complex maintenance schedules easy

Need to create your Work Order and Work Order Line Items for monthly, quarterly and yearly maintenance, all with different plans and schedules which costs a lot of time and effort? Now with Advanced Maintenance Plans and Maintenance Work Rules you have access to easy functionality which makes generating your Work Orders with all kinds of different recurrences simple. Also when it's a big asset structure with multiple levels of sub assets, requiring their own maintenance schedule, it's a walk in the park with the Maintenance Work Rules.

Providing the Recurrence Pattern at the Maintenance Work Rules does most of the work for you in the Advanced Maintenance Plan.



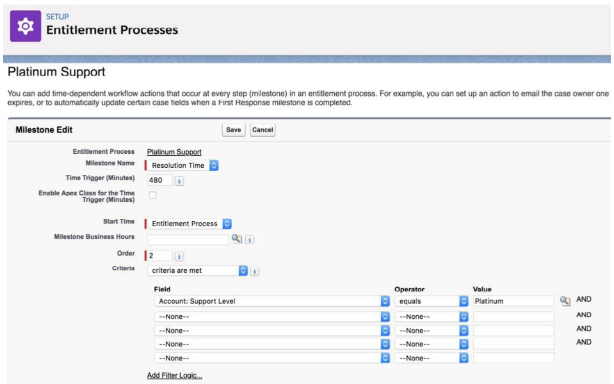
Maint Work Rules

After generating the maintenance Work Orders and related Service Appointments the new Point-to-point predictive routing makes the scheduling even more precise as it takes the exact location of the Service Appointment and time of day into account when calculating travel times.

"Seeing Salesforce listening to their customers and adding functionality to support their business processes is a great thing! The Advanced Maintenance Plans will adequately be used by customers, decreasing time and effort in the back office, and resulting in more efficient maintenance departments." - **Stephan Segers, Senior Service Cloud Consultant**

Hit the ground running when implementing Entitlement Management

Setting up entitlements in your Salesforce org is easier than ever before with the Spring '21 release. With this release, challenging setup processes are a thing of the past with the new prebuilt, customisable entitlement templates. After enabling entitlement management, Salesforce automatically creates a sample process, complete with different milestone types, an SLA process, Warning Action and sample account. Fields can be edited to fit your customer data.



Entitlement process with milestone

Determine which customers are eligible for support, what steps need to be completed and in what timeframe. All to better manage service contracts, keep track of service agreements and to supercharge your productivity. Speedy, effortless and powerful - promise. It's included in new Service Cloud licenses and available for existing orgs through the Service Setup Assistant.

The Spring '21 release also brings some other case management features. Admins can use profile filtering to keep them safe from users viewing any profile outside of their own. Email settings have also received an upgrade, where notifications used to be sent from the noreply@salesforce.com address, this can now be customised into a default FROM address of your choosing. This way, customers can quickly recognise your notifications. Bcc Address information is also shielded from Experience users when they have less than read permissions and did not send the original email. The field is covered in the feed or left blank on the Email Message compact layout or home page. Email-to-case changes can be adopted via the Release Update feature until the Winter '22 release.

"Now that Salesforce is making more tools - like Entitlements - easier to set up, Admins help their company's agents become more productive. The time and effort saved can be transformed into an even better Customer Experience, which results in more happy faces, win-win!"
- Mille Bonekamp, Salesforce Service Cloud Consultant

SALESFORCE MARKETING CLOUD

Top new Marketing Cloud features in Spring '21

As you might know Marketing Cloud has a different release cycle opposed to Core Salesforce products as Sales & Service Cloud. This means that this Marketing Cloud release technically isn't part of the Spring '21 release, but is released separately in their January '21 release on February 6th. However this new release has some exciting new features!

Whatsapp Integration

In this release the Marketing Cloud team has announced that there will be a standard out-of-the-box integration with Whatsapp as a communication channel. This means that you can set-up a Whatsapp Chat channel in your Marketing Cloud account, making your customer journeys even more personalised on your customers preferred channel.

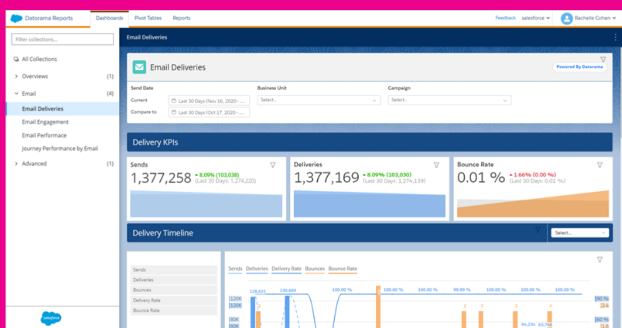
This Whatsapp Chat Channel can be used to deliver template based transactional messages and so send session messages, where customers can respond via Whatsapp.

Datorama Reports & Retirement of Discovery Reports

Announcing acquiring Datorama in August 2018 the Salesforce development team has been working on integrating this new analytics platform into the Salesforce platform. In this release Salesforce is making a big step in optimizing the reporting & dashboarding capabilities on the Marketing Cloud platform by making a part of Datorama generally available. This means that all Marketing Cloud customers can use the power that Datorama brings to the platform from now on. Now you can get insight into how your business unit, journey or specific email is performing in one dashboard, schedule and send customized Reports with your colleagues or your manager and analyze your data to spot trends or patterns.

Check-out [this] great video on all the new functionalities datorama reports will bring to the platform.

Making a part of Datorama generally available will mean that the "old" reporting solution has been set for retirement in April 2022. This will mean that all the reports in Discovery will be replaced by Datorama reports from April 2022 onwards.



AMP for Email

This new feature is a big step in creating very responsive and amazing looking content. Bringing AMP to Salesforce Marketing Cloud enables companies to generate more engagement with their customers right from their inbox. Some examples of using AMP for email to generate customer engagement are:

- Creating in inbox checkouts for retail stores: Let your customers (re-)order products right from their inbox, without having to leave it.
- Scheduling appointments: Send your customer an invitation to your upcoming webinars and let them pick their preferred timeslot, all within their inbox.

Bringing this to the platform, you will be able to create amazing looking content for your customers that will also allow them to respond to you without sending an email, filling in a form on a landing page or having to call their contact person. It can be done right from the inbox!

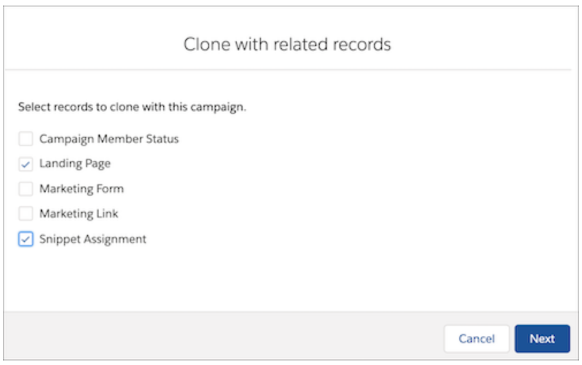
Check out **this** video around AMP for email to get a glimpse at what it can do for your business.

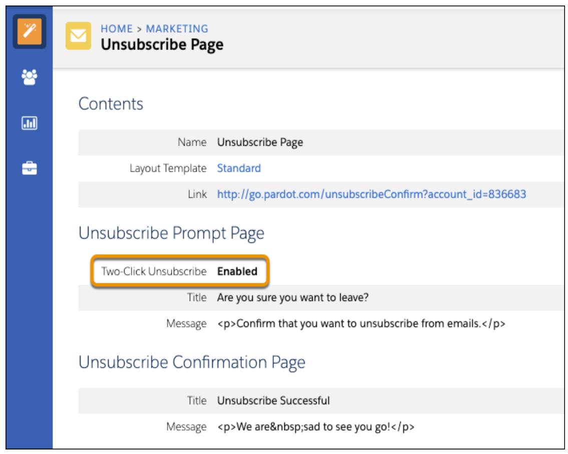
PARDOT

Top new Pardot funcationalities in Spring '21

Quickly Clone Campaigns with Related Assets to save time

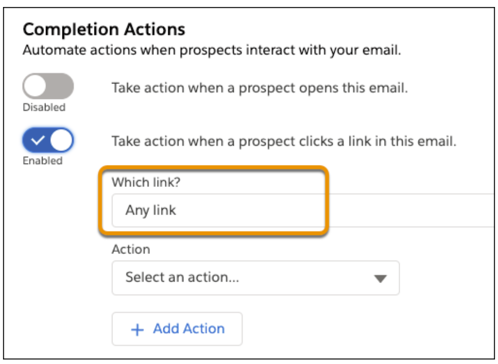
Users now can select Clone campaigns when they want to create it with the same related records as an existing one, you now have quick access to more types of records. You get an enhanced Clone with Related tool for campaign records that includes Marketing Link, Marketing Form, and Landing Pages.





Increase Email Marketing Retention with Two-Click Unsubscribe

Now prospects will need to confirm that they no longer want to receive your emails. With the intention of preventing email security scanners from automatically unsubscribing prospects and to make it even safer you can tailor the message that email subscribers see when they click the unsubscribe link.



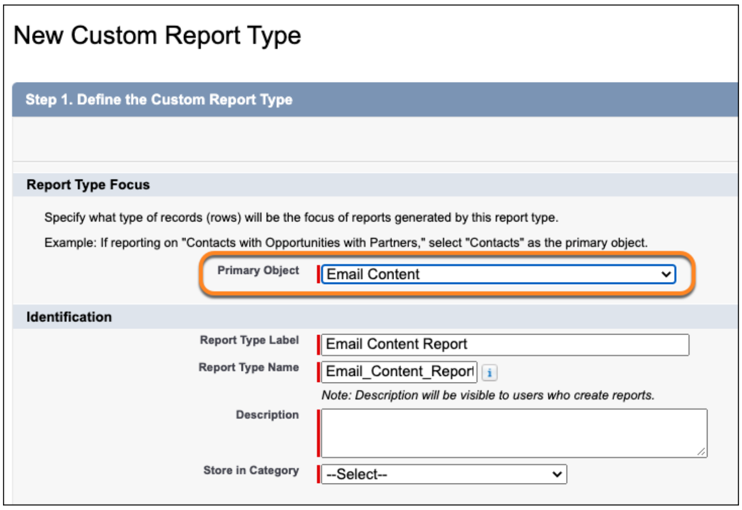
Specify a Link for Completion Actions in Pardot Emails

Just by turning on the link click completion action and selecting the link and action to use, Marketers can now set a specific link to trigger a completion action on emails, giving them more control over their email sends.

"With the spring '21 release Pardot new functionalities marketeers can save so much time by cloning campaigns and creating reports that show email content performance and engagement with custom reports."- **Nubia Ramos - Pardot Specialist & Salesforce Consultant**

Analyze Email Content Performance with Custom Reports

Now you can select email content as the primary object for custom report types. And you can select the list email object as a related object. Marketers can then create reports that show email content performance and engagement. For example, a report can show engagement statistics by email content record.



Enhance your ABM by tracking Accounts as Campaign Members (Beta)

Enhance your account-based marketing efforts when you use Connected Campaigns with Accounts as Campaign Members. Add account records as members of a campaign so you can focus your attention on these accounts in the tables, related lists, and reports that contain campaign members.

"I'm looking forward to the Spring '21 release for Pardot. Some nice features will be released like Cloning Campaigns with related Assets and the Two-click Unsubscribe. But my favourite is the move to ABM and the possibility to create Campaigns focused on your Accounts instead of Leads and Contacts. This is going to be a great addition to Pardot!" - **Jelle Schippers- Pardot & Salesforce consultant**

MYTRAILHEAD

Top new myTrailhead funcationalities in Spring '21

What is this all about?

Salesforce myTrailhead has already set the bar for creating a learning culture for organizations where learning is supported in a fun and engaging way. With the use of badges and adding other elements of gamification like ranking and personalized learning trails, people were already highly motivated to keep learning on a continuous basis.

However, Salesforce is raising the bar even further with the Spring '21 release of Salesforce myTrailhead by offering In-App Learning!

With In-App Learning with Trailhead, users can learn the skills they need when they need them—without leaving your Salesforce org. Admins or designated trainers can add relevant myTrailhead modules to the learning panel, matching the learning content to the context where your users encounter it.

Imagine providing specific learning content to a customer service employee for handling product return requests when handling a case within Service Cloud without having to leave Salesforce. Or providing specific learning content and guidance on how to handle priority 1 cases for VIP customers, right when a case gets escalated. How powerful is that?

Providing learning content on the relevant moments is key in driving process optimization and increasing customer satisfaction.

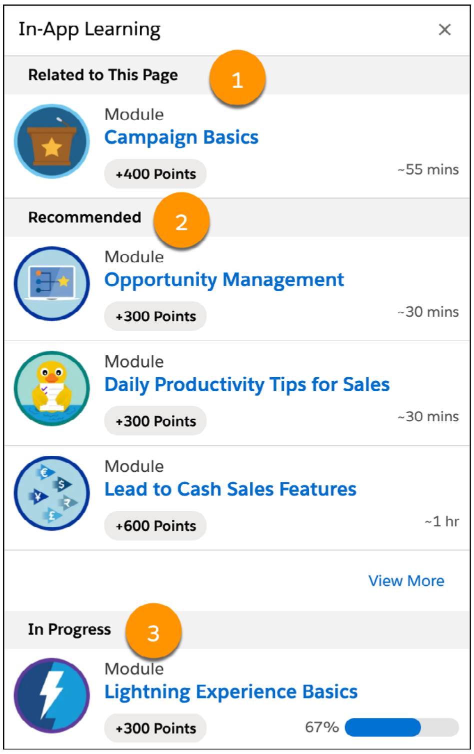
Trailblazers can read the content, take the quizzes, and earn the badges right in the Salesforce app.

"Salesforce was already leading the pack by transforming the way people learn by making it way more engaging and fun. With this new feature, users will no longer have to leave Salesforce but will get relevant learning content within their Salesforce app, tailored to the exact process step they're in. This will even further lower the barrier towards learning and drive adoption and productivity within Salesforce."
- Pieter Hendrikx, Industry Lead Professional Services & Utilities

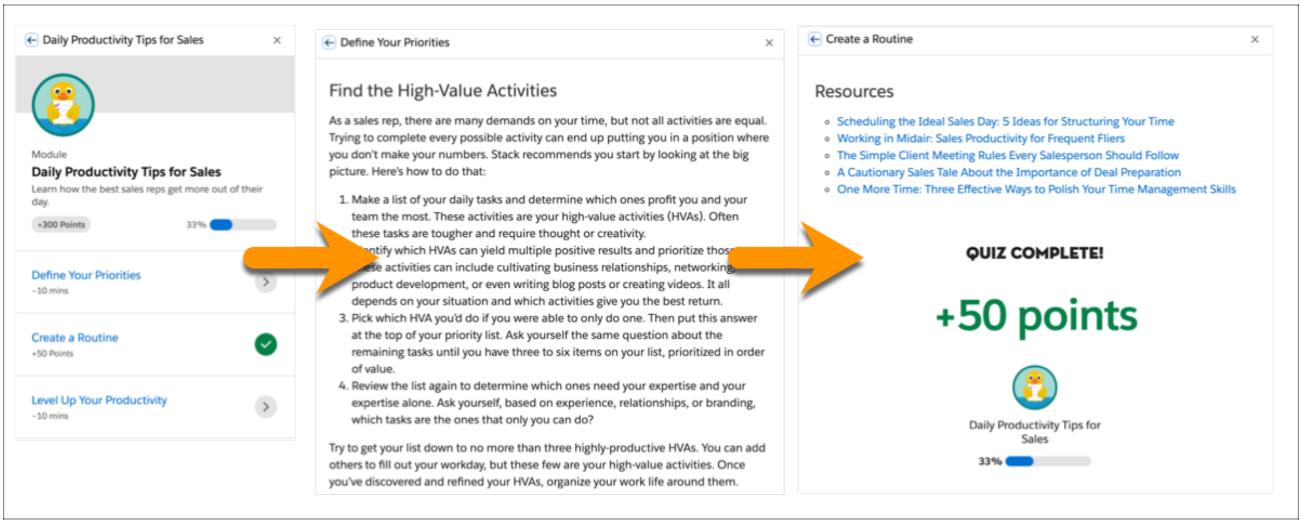
How does this work in detail?

Learning the skills you need when you need them—without leaving the app is easy-peasy!
Previously, users opened modules from the Help Menu in a new tab or went to the Trailhead website to search for content. Now, simply click the new Trailhead icon in the global header, which opens the panel. Users experience the fun learning opportunities of Trailhead inside the workspace.

There are up to three sections in the in-app learning panel. If a module is associated with a specific object, it shows up under Related to This Page (1) for both the object home and record pages. Other globally assigned modules show up under Recommended (2). If the user has Salesforce-related accounts that are part of a Trailblazer.me profile, then the modules that they started show up under In Progress (3). And, any badges earned within the app are included in your profile.



To start learning, click the module, then the unit name. Take the quiz as you would for a module on the Trailhead website.



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