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The design and tech firm.

Release Paper

SALESFORCE SUMMER '20 RELEASE



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INTRO

Huub Waterval
CEO Nextview



Dear Trailblazer,

Summer has started, and what a start of the year it was. In the previous issue of our Release Papers, I wrote the final words 'hope to see all at the Basecamp the 26th of March' We all know what happened since then and I believe we have all been working hard for our business in these challenging times.

For Nextview too, it has been a challenging time too. We took charge as soon as it was clear that we were all to work from home and created a handbook on how to best work remotely in a team for our clients over the course of 1 weekend. We stayed close to our clients to see how we could help them best navigate these challenging times. We changed our on-site workshops into live online-events successfully and have decided to do this on a monthly basis going forward. If you have missed them, please check out our Youtube channel to watch our webinars on demand.

In May we had something to celebrate as we could proudly announce an investment from Salesforce Ventures in Nextview which supports our first steps on the German market and the release of our brand new website: nextviewconsulting.com

To remain up-to-date with all products we spend many hours in virtual classrooms to obtain knowledge and in the last months, colleagues obtained certifications for B2B Commerce, Mulesoft and Tableau. As Salesforce is extending its portfolio we invest in acquiring all necessary knowledge for these products and we remain your number 1 independent Salesforce partner in the Netherlands (and Germany).

A positive thing in challenging times is that Salesforce keeps developing its products and have added many features to their products. Our colleagues kept the highlights from more than 10 products in just 15 pages. With the limited reading time needed you're completely updated, we know you are busy!

As always the start is for Sales Cloud where Niek Bachman highlights new possibilities for task notifications on your mobile phone and the fact that B2B commerce becomes Lightning awesome!

Chara Paschalidi and Andre Jansen discovered many features that will be released for Salesforce Platform and Mulesoft. Many of these features focus on the Customer 360 view providing a perfect overview of your data.

The Data & Analytics team highlights this time new features in Salesforce Einstein but they also speak briefly about Tableau and Snowflake. The team obtained quite a few certifications and is becoming a true Data & AI powerhouse.

Stef van den Oever updates you about Service Cloud Voice, which was announced last year during Dreamforce. He also adds some of the best new features in Field Service Lightning.

Last but not least our Marketeer Jonathan Mol took three interesting features that are coming to Pardot and Marketing Cloud.

I hope you will enjoy reading our fourth Release Paper and we're always there to improve your business and to unleash your potential. At last, I hope to see you soon online or offline! Check out our website and tell me what you think!

Happy trailblazing,

Huub

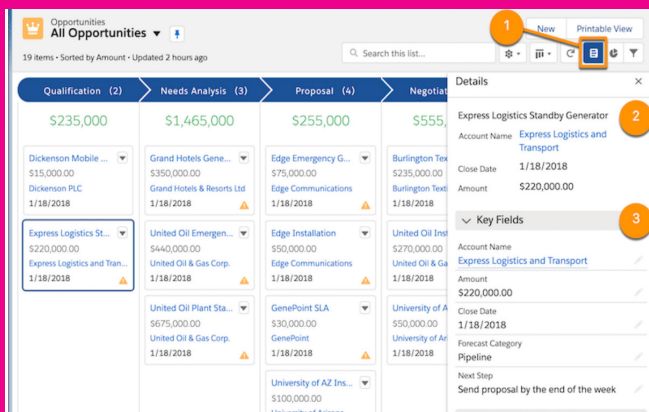
SALES CLOUD

Our top new features in Sales Cloud Summer '20

Task notifications on your mobile!

Task management; it's one of those things where we as humans can have serious struggles with. Making sure we do the right followup on the right moment, never forgetting things we should've done is something we're all striving for. But a lot of people also know the struggle on dealing with this properly. Salesforce has its task management for a longer time already, but for people on the road and not on a laptop, you always have to check the actual task list in your app.

Luckily this is changing now! Reminders for activities has arrived! This means that you can get a notification for your activities on your mobile phone! For now this is still in pilot, but it is looking very promising!



Opportunity Kanban

Working from your Opportunity Kanban overview!

Well known and loved for most of the current Salesforce customers by now is the Kanban overview. When we run demos for people who are completely new to Salesforce it's also always something people really love and we must admit; the functionality is great for getting an overview, but it lacked actionable insights.... Until now!

We get an addition to the Kanban overview, where we can see the Key Fields and the "Guidance for Success" in the overview as well! This will make your life a lot easier as you don't have to open the single opportunities anymore to get all of the



Running your activities from Salesforce became more and more important after Salesforce has introduced Lightning Experience a few years ago. Especially when customers have large amount of calls, email conversations and other type of activities on certain records. This is when I notice it becomes a true challenge to keep the activity overview for users and this new feature will help the adoption of the Salesforce system greatly!"

David van der Meer, Practice Manager Sales Cloud

B2B Commerce is becoming Lightning Awesome!

We see that commerce solutions are becoming more and more important on all levels of business. Where it is already very common for us to order our personal products online, in the B2B world this is not as common yet. But when we do order our B2B Products online, we do want the B2C experience right?

Salesforce has recognised this and included B2B Commerce in the portfolio a while back already, but it was being run in a classic way. Now it is becoming fully integrated with the basic platform and can start using the standard Salesforce functionalities more and more!

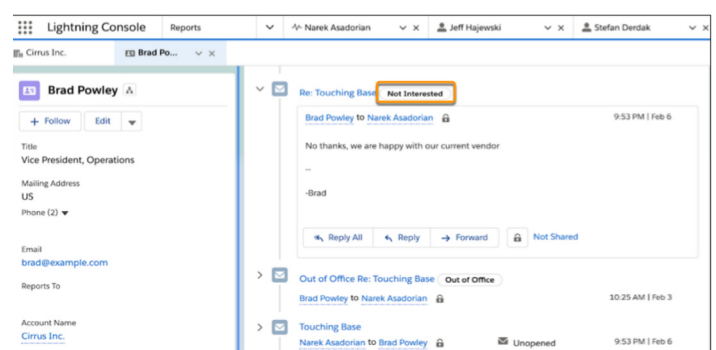
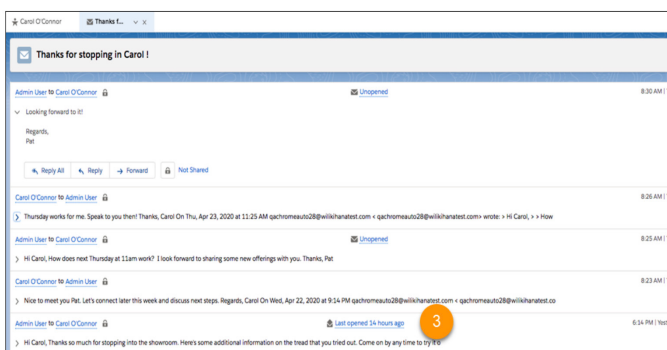
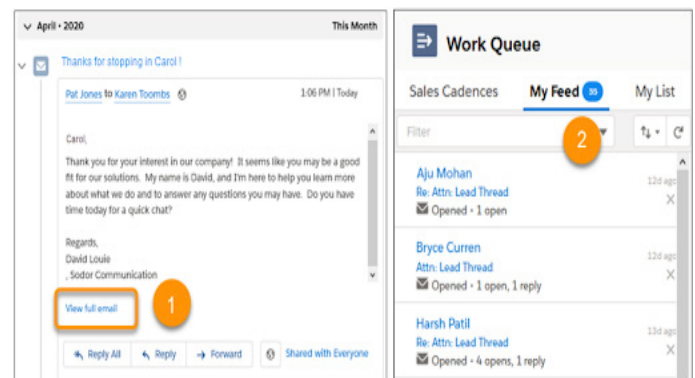
As with all newly introduced products, it will take some more time to get all of the functionalities over to Lightning straight away, but if you're in the process of looking into B2B Commerce solutions for your company, make sure you take a look at this. We can tell you it's looking amazing! Interested in learning more? Make sure to reach out and we'll tell you more about how you can get a kickstart to get your Online Store running with the latest features!

Threaded email and getting insights!

In line with the previously mentioned task management improvement, there's another activity enhancing feature coming in!

With Einstein Activity Capture you have the availability to easily capture your emails, however, if you go back and forth a lot with your customers, the email threads can get lengthy... very lengthy at times even. This will clutter your overview of what your activities actually have been and can truly be a pain in running your business.

Luckily we no longer have to wait, as there's the enhanced feature of Threaded e-mail, in which Einstein will automatically help you in mapping your emails together!



Einstein Activity Capture

SALESFORCE PLATFORM & MULESOFT

Top new Platform & Mulesoft Features in Summer '20.

Flow Builder

The new Lightning Flow is getting more and more popular and it is being enhanced in every Release. With the last update, a flow can run after a record is saved, something that was not possible before. Those flows can access other records and use more types of flow elements.

In addition, you can now debug autolaunched flows that save changes to the database faster by using rollback mode, without having to revert those changes manually anymore.

Event Monitoring Threat Detection

Threat Detection is a new feature, available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions. It uses statistical and machine learning to detect security threats such as unusual report usage, session hijacking or credential stuffing and gives detection feedback.

You can create notification-only transaction security policies on events and view them in the Salesforce UI with the new Threat Detection app or detect errors when an org exceeds the concurrent long-running Apex limit.

Lightning Experience on the Safari Browser

This feature was already in Beta in Summer 19' release and it is now generally available for all iPad users. You can now enjoy the full Lightning desktop experience on your iPad Safari browser while on the go, which allows you to have more flexibility in your every day activities!

Mulesoft

Mulesoft is the Integration and API Platform of Salesforce. Together with the Salesforce Cloud Solutions it provides in a flexible and agile platform for companies to implement their digital transformation strategy. Within this strategy Integration is still a major challenge for most organisations, but Mulesoft's Anypoint platform helps to open up your legacy applications and siloed data and use them in your daily business.

Mulesoft does not follow the Release planning of Salesforce, but that does not mean they haven't released anything lately. Here are the most interesting topics.

Work.com

A great and useful example of the innovations described above is work.com. Mulesoft worked together with Salesforce and Tableau to create a single platform to support employees returning to their workplace during the COVID-19 crisis. Mulesoft delivered the API's, connectors and templates to unlock data for this platform. But Mulesoft also provides templates and API's to give developers access to trusted and reliable data on COVID-19 to make this to good use in their own applications

Development and Citizen Integration

Mulesoft is constantly improving their development tools, this is not only an advantage for developers, but also for “Citizen Integrators”. The low code Mulesoft Flow Designer reduces the gap between Business and IT: People from the Business are able to design process flows using reusable components, which can be provided by IT. Mulesoft is providing more and more templates for those components. By creating templates for common Salesforce integration flows it enables companies to have a quick start on building their own Salesforce integration solutions.

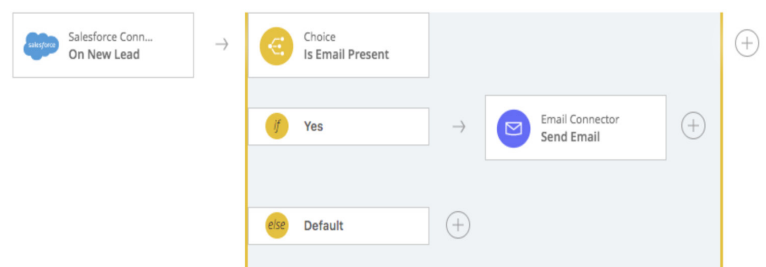
In addition, you can now debug autolaunched flows that save changes to the database faster by using rollback mode, without having to revert those changes manually anymore.

Salesforce Customer 360

Customers want consistent experiences across multiple channels. On the other hand, the customer journey is not limited to Salesforce only. As a result, it is very difficult for companies to get a single view of their customers. Therefore a good integration strategy is an important part of Customer 360. Mulesoft delivers this strategy and the tooling to integrate Salesforce Customer 360 to any data or system. Together with Salesforce they give sales and service teams a complete customer view and help platforms to seamlessly connect across channels. The recently delivered templates, accelerators and API's make this connected experience possible.

Mulesoft Accelerators for Salesforce Cloud

Mulesoft and Salesforce have been working together to bundle API's, templates, documentation, best practices and more into accelerators for Salesforce Cloud to be able to implement integrated applications. This helps companies to make good use of their Salesforce cloud solutions and implement integration use cases fast and easy. Lately Mulesoft and Salesforce presented accelerators for Service Cloud, B2C Commerce Cloud and Work.com.



Mulesoft Accelerators

API Community Manager

The key to the success of an API platform is that developers are able to discover, learn, try, use and comment on the API's available in your company. Mulesoft provides an API Community Manager based on the Salesforce Community Cloud to provide in this. All API's from Mulesoft, Salesforce and other sources can be made available to developers using this community. They can quickly find out if there are API's to suit their needs and start using them. Access rules make sure that only authorized parties can use the API's provided to them. Mulesoft recently added this to their portfolio and is continuously improving the API Community Manager.

Trend, delivering combined innovations

Mulesoft provides an integration platform and an API strategy for Salesforce customers, but also for customers who don't use Salesforce, to create a connected experience. What is interesting for Salesforce customers is that on one hand Mulesoft is delivering more content to help in creating a connected experience and on the other hand Salesforce and Mulesoft are innovating together to deliver extra value for Salesforce customers. The topics mentioned above are a result of this cooperation..

SALESFORCE DATA HUB

Our 5 favorite Einstein Analytics trends in Summer '20!

Next-level data preparation in Einstein

Again the Einstein Product Management team comes up with a couple of good enhancements on the data integration side. One of the great features we want to dive into is data prep in a dataflow.

Dataflows are used to do data manipulations like joining data together, filtering data, aggregate data, and transforming data.

Until this moment it was time-consuming for a developer to check if the data manipulations were done right. A developer needed to finish the flow, run the flow and check the output.

With this new feature, that needs to be enabled in the Analytics settings, every single step in the dataflow can be checked on a correct manipulation of the data.

This will really speed up the development and testing of dataflows. The ability to check the data after each step in the flow will be a real benefit. A developer can directly fix mistakes and see the outcome of the change he made. We can't wait for the feature to be out of beta after the summer release and guess it will be very welcomed by developers.

Dataflow check per step



"This is a huge improvement for the data transformation! No more difficult combinations of dataflows and recipes, possibility to see the output of the dataset immediately, user-friendly interface — Data Prep saves a lot of time for Einstein Analytics developers and improves back-end transformations a lot. I can't wait to try this new feature!"

Tatiana Mashliak, Analytics & AI Consultant

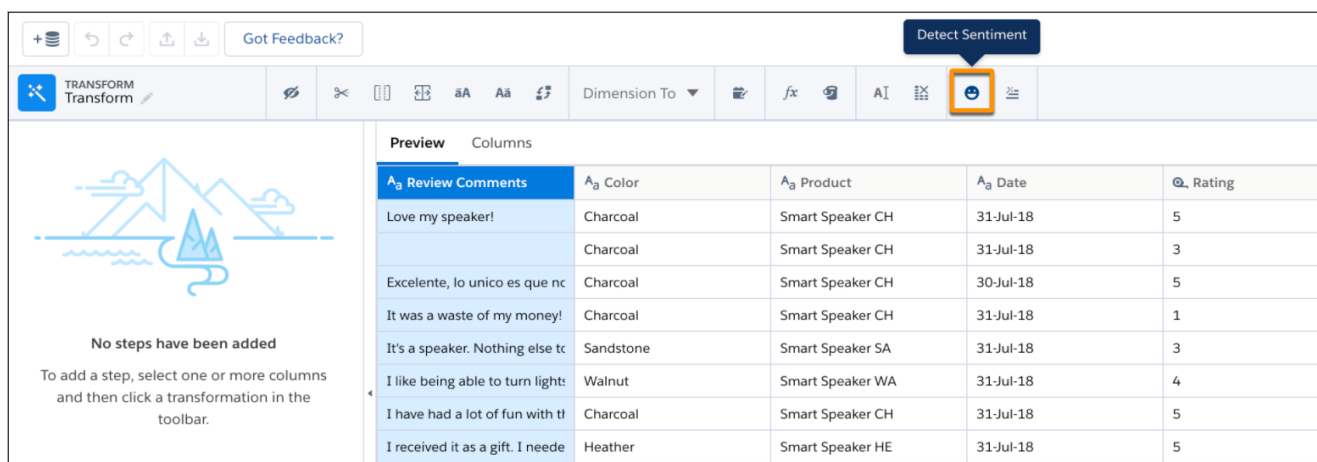
Get a Sense of how your customers feel

Sentiment analysis in a click, out of the box. This is really cool! Einstein Analytics can now analyze a text field and categorize this into positive, negative, and neutral. Do you see the variety of use cases as well?! Get valuable insights if there is a sentiment change in logged cases for a product, or how customers feel about a product or service through survey responses. And what about analyzing external data like twitter and product reviews when you just launched a new product.

When your data is already in Einstein Analytics, adding this sentiment analysis to your data is really a click on a button. At this moment you do need to activate the new data prep feature for dataflows. When you have done this, click on a column you want to do sentiment analysis on and click on the "Detect Sentiment" button. This will create a new column where the sentiment (positive, negative, or neutral) will be placed per line.

By grouping the sentiment data for example on product(group) you can monitor or set an alert when sentiment will change in a positive or negative way.

Einstein sentiment check



The screenshot shows the Einstein Analytics interface. At the top, there's a toolbar with various icons and a "Detect Sentiment" button. Below the toolbar, there's a "TRANSFORM Transform" section. On the left, there's a message: "No steps have been added. To add a step, select one or more columns and then click a transformation in the toolbar." On the right, there's a "Preview" table with columns: "Review Comments", "Color", "Product", "Date", and "Rating".

Review Comments	Color	Product	Date	Rating
Love my speaker!	Charcoal	Smart Speaker CH	31-Jul-18	5
	Charcoal	Smart Speaker CH	31-Jul-18	3
Excelente, lo unico es que nc	Charcoal	Smart Speaker CH	30-Jul-18	5
It was a waste of my money!	Charcoal	Smart Speaker CH	31-Jul-18	1
It's a speaker. Nothing else tc	Sandstone	Smart Speaker SA	31-Jul-18	3
I like being able to turn lights	Walnut	Smart Speaker WA	31-Jul-18	4
I have had a lot of fun with tl	Charcoal	Smart Speaker CH	31-Jul-18	5
I received it as a gift. I neede	Heather	Smart Speaker HE	31-Jul-18	5

Use all predictive models at once, get the best outcome.

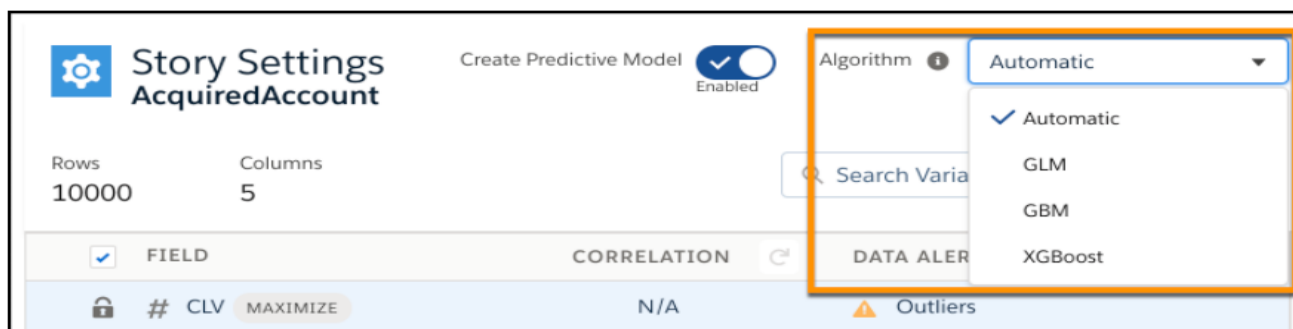
Also on the Einstein Discovery side, there are a couple of new features. Einstein Discovery is all about augmenting your business intelligence with statistical modeling and machine learning to identify, surface, and visualize insights into your business data.

For this you need statistical models to run your data against. For now, Discovery could only handle one model at a time. This will change in the upcoming summer release. Now you have the possibility to run the data against all three models. Einstein Discovery will then show the results of the model that performed best. This will normally result in you getting a better prediction. That's not the last update on the algorithm side. Salesforce is also adding a new modeling algorithm to the table: "Random Forest". Within the Data Science world this is a well-known model that sometimes is easier to finetune and is able to better handle noise than for instance XGBoost. It is great that Salesforce is allowing Data Scientists to choose the model they see fit, but of course, if you do not know how it works, you can leave it up to Einstein to choose the best fitting model.

"It's great to see how easy it is to add Sentiment Analysis to a dataset. With such an out of the box solution customers can directly focus on the important things: get valuable insights from your data"

Ralph Knoops, Senior Analytics & AI Consultant





Multiple data models available

Use Snowflake to unleash Einstein AI superpowers across your business

We are seeing a lot of customers using Einstein Analytics for Business Intelligence use-cases. This means they are not only using it for Salesforce data but also combining it with ERP or other data-sources like sales, deliveries, and inventory and in most cases this is working out great. You can of course load the data into Einstein Analytics as smaller data-sets, but in some cases, you may be looking at the benefits of one central (big) data storage and sharing platform. So what do you do? There are many solutions of course, our current favorite is the Cloud Data Warehouse Snowflake.

Snowflake is a super flexible data platform to centrally store, control, govern, scale-up/down and share data to people and systems, and guess what? It now has a live connection functionality with Einstein Analytics! You can directly analyze datasets from Snowflake in Einstein Analytics, without the hassle of running frequent complicated dataflows.

On top of that, Einstein Analytics is now able to also write back to Snowflake. Why is that a big thing? Well, it now allows you to use the AI power of Einstein, write the results back into your Snowflake environment so that other systems can use the outcome of your predictions. It pretty much allows you to integrate Einstein AI into any other system.

Tableau is onboarding into the Salesforce ecosystem

For those who are not familiar with it, Tableau, one of the leading Data Visualization & Analysis technologies in the market, was acquired by Salesforce last year. Tableau is also an innovative company focused on continuous improvement and much like Salesforce does this with about 4 releases per year. This year, Tableau has made several larger upgrades to their products. For instance, they have moved from standard integrating datasets with a "join" towards using "relationships". Such a relationship data-model allows for using the same dataset for many use-cases, rather than recreating new datasets for each use-case. It brings you a lot of speed in your treasure hunt to data driven insights. A recent addition on the Salesforce integration side is to integrate Tableau pages. Although for many years you could already have used visualforce pages and iframes to get your Tableau dashboard in your Salesforce UI, we now see the first standard-integration methods that we all know as lightning components.

We will not cover all recent Tableau updates in this paper now, but we will be keeping an eye on Tableau for the next papers to come. If you want to become a "Data Driven" company, if you want to "Bring your Data to Life", Tableau is an excellent place to start that journey. And as the alignment between Salesforce and Tableau continues, we are expecting further integrations that will benefit companies who have both Salesforce and Tableau in their IT-stack. We expect Tableau to be able to better understand the Salesforce data model by default, but we also expect that soon Tableau will be able to leverage the AI-power of Einstein. We are looking forward to it!



"The writeback to Snowflake or Amazon S3 functionality in Einstein Analytics is a great step forward. Customers can easily share Salesforce (AI) data to their central data warehouse. Customers can use this functionality in so many use cases."

Ralph Knoops, Data, Analytics & AI Consultant

SERVICE CLOUD & FIELD SERVICE LIGHTNING

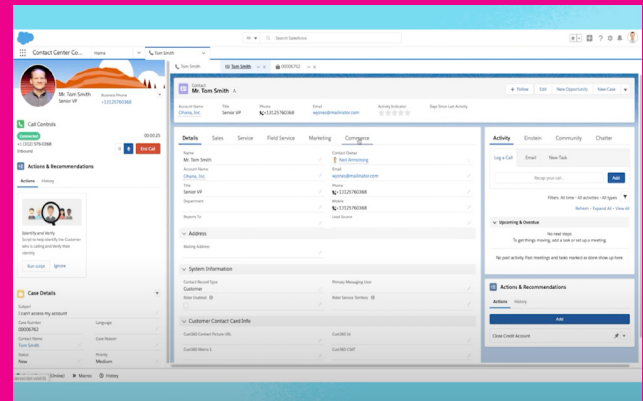
Top new Service Cloud & FSL Features in Summer '20.

Telephony moves to your Service Cloud console

Phone still remains one of the most popular interaction channels for customers to get support. Having done many Service Cloud implementations at Nextview, we know how complex an average Computer Telephony Integration can get. This is why we are especially excited to see Service Cloud Voice being announced during last Dreamforce - and now it is there for all of us to use!

Service Cloud Voice is more than just a feature - it's a toolkit for better, more efficient and native integration of the phone interaction channel into Salesforce. It's available as an add-on license. Combined with the power of Amazon Connect (a leading Cloud Call Center product) it allows for easy and no-code CTI integration.

Having telephony directly into Salesforce allows you to leverage the full power of the Lightning platform, like routing phone calls through your existing Omnichannel setup, view contact center analytics and allow for phone calls to be transcribed in real time



Service Cloud Voice



Expanded Account Relationships

Have Einstein as your personal prompster

If you are chatting a lot with your customers in English, you should really try out the newly released Einstein Reply Recommendations. This functionality uses your data set of past Chat Transcripts (minimum of 10k) in order to proactively recommend past replies on running chat sessions. This way it becomes even more efficient conversing with your customers over chat. If you're using Quick Text, you can easily transform reply recommendations into Quick Texts for future use.

"Having telephony natively embedded in Salesforce Service Cloud finally allows us to use the full power of the Lightning Platform on anything related to phone calls, from analytics to automations and AI."

Stef van den Oever, Customer Practice Manager



Measure agent capacity in Omnichannel based on work item status instead of open tabs As you might know, Salesforce Omnichannel is a powerful functionality in Salesforce that allows for automated capacity-based routing of work items (like Cases) to agents. Up until now, the capacity of an agent was usually determined by the number of tabs open in the Service Cloud console. Once the agent closed a tab, it was no longer calculated to be taking agent capacity and new work items were to be assigned.

In the Summer '20 release administrators can now enable a 'Status-Based Capacity Model' which measures agent capacity according to work items assigned to them and their status. In some cases, this will give a more reliable view on agent capacity.

After enabling this functionality, ensure to enable the same for all Service Channels you want to use this capacity model for.

Field Service Lightning grows in it's capabilities once again

The Summer '20 release is packed with improvements specifically for Field Service Lightning that will make providing service on location even easier.

- Added functionalities to manage loads for your field engineers and their vehicles
- More customisation options for the GANTT chart in terms of permissions
- More granular sharing options for Maintenance Plans and Service Contracts
- Track expenses related to Work Orders
- Improved Shift Management is now generally available

Improved FSL Shift management



"By making sure that cases are provided to the right agent at the exact right moment, service agents can focus on one thing: helping customers. Let Omni-channel enable your agents to handle the cases that need attention at that moment. This will reflect in happy customers and employees!"

Ignace Kozica, Senior Service Cloud Consultant

Salesforce Marketing

Top new Pardot & Marketing Cloud features in Summer '20

For the first time, the Marketing products from Salesforce are also included in the Release Paper. Within Nextview we have invested time in obtaining experience and certifications in the Marketing Field. This Release Paper issue we can share for the first time also some interesting developments in Pardot and Marketing Cloud.

Updates

Pardot and Marketing cloud have more updates during the year than the other Salesforce products. It is recommendable to monitor the update schedule of both Pardot and Marketing Cloud via help.salesforce.com

Pardot

Sandboxes

The biggest change that is coming to Pardot is the arrival of sandboxes. Previously it was possible to link a Salesforce Sandbox to a Pardot environment, but when moving to production it was needed to re-configure Pardot again. That struggle is over with the introduction of the Developer Sandbox. This provides the opportunity to build and test without the risk of doing something terribly wrong in the production environment. Pardot Sandboxes will be available for those having Pardot Advanced Edition and connector vs2.

Upgrade of the Connector

Pardot always had to version of the connector, v1 one for those who started using Pardot before February 11th, 2019 and V2 for those that starting using Pardot after that data. In v2 some pain points from v1 got solved. Now an upgrade has arrived for those using v1.

Data-Driven B2B Marketing

The summer release comes again with upgrades for those who want to make data-driven decisions within their marketing department. Pardot had already the option to use B2B marketing analytics, but coming release Pardot Einstein will be added as well. It's equipped with a data-driven model that enables organizations to see which engagements led to which results. In 2020 it is a no-brainer that these tools and possibilities make your marketing department and their assets only stronger and stronger.



"While not every feature seems that big, these slight but important updates make the work of Marketeers easier and easier. As a daily Pardot user i'm really happy with the announcement of Sandboxes within Pardot."

Jonathan Mol, Product Marketing Manager

Marketing Cloud

As written before Marketing Cloud and Pardot have a different update schedule, in this Release Paper some functionalities from the latest May update will be shared.

Single Send Journey Enhancements

Single Send Journeys got upgraded with the possibility of sending notifications via the journey builder, with this functionality it becomes much easier to integrate notifications in your journey, and of course, you can schedule them or send them on a later moment.

Pause and Resume Journey Builder

Every company can face a terrible situation and should be prepared for that. But unfortunately, one cannot be prepared for everything. Changing your marketing communications can be of high importance in these moments. With the new update, it is possible to pause your journey or update them with relevant additions and resume them when it suits you, within 14 days from putting them in pause-mode.

Retiring Classic emails, landing pages, and simple automated emails.

Innovations mean also saying goodbye to older functions. In the newest release Classic emails, landing pages and simple automated emails will be retired. Classic creation has been retired per June 30, the other ones will be retired by January 2021. For those that intensively work with these features, there's still time to change.

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.nextviewconsulting.com/career/> and see if there's something for you!



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