nextview...

Salesforce **Release Paper**

Summer 2022

Salesforce **Release Paper** Summer '22

Introduction
Huub Waterval
CEO Nextview

Huub Waterval
CEO Nextview

Dear Trailblazer,

What an amazing year so far! Breaking all records with nominations in no less than 10 categories, we are incredibly proud to have won the Manufacturing & Equality Excellence Salesforce Partner Awards. A lifetime achievement that has taken so many small and big efforts over the years, and great recognition for everyone at Nextview.

We are not there yet, but winning these awards is a great motivation to take things to the next level again. We do so in our efforts toward an equal and sustainable world, which we aim to achieve with commitments to the 1-1-1 Pledge and the United Nations Global Compact, and partnerships with Techgrounds and Refugeeforce, among others. But also in new partnerships.

Stepping into the world of esports, we recently decided to become the main sponsor and partner of award-winning sim racing team Burst Esport from Denmark with leading drivers from Europe - an exciting and fitting step for us as a certified B-corp. On top of that, we continue to grow in both the Netherlands and Germany. And our partnerships with Salesforce, MuleSoft, Tableau, and Slack are stronger than ever.

With another promising year almost halfway, we are eager to share with you the most exciting new Salesforce possibilities. Feel free to contact us for a cup of coffee or a first remote digital engagement in case you have any questions. We are more than happy to help improve your business.

Happy trailblazing,
On behalf of all your friends at Nextview Consulting,

Huub Waterval
CEO Nextview Consulting

Read on →

Back to chapters

Gelske Blok
Service Cloud Consultant

Paula de Amicis
Service Cloud Consultant

Lowie te Riele
Managing Service Cloud Consultant

Service Cloud

Summer is upon us. And yes, this means better weather, but more importantly, it means that Salesforce is once again releasing some great new features as part of the Summer '22 release. One of the first new features we will describe is that the tracking of SLAs will be easier as the milestone time becomes automated.

Secondly, we will dive into incident management. Where in the Spring '22 release Salesforce added integrated paths, this release focuses more on the possibility of swarming incidents with Slack. Next to this, Salesforce also added some significant new out-of-the-box flows for Incident Management.

Finally, within the upcoming release, various channels (like phone & messaging) have been enhanced. One of the cool new features with Intraday Management is that end users can identify and resolve gaps within staffing!

Chapter topics

Read on →

Back to chapters

“With Intraday Management, planners can focus on the current business day, allowing them to immediately act on scheduling and shift needs.”

Read on

Back to chapters

Better SLA Tracking and Reporting on Entitlement Processes

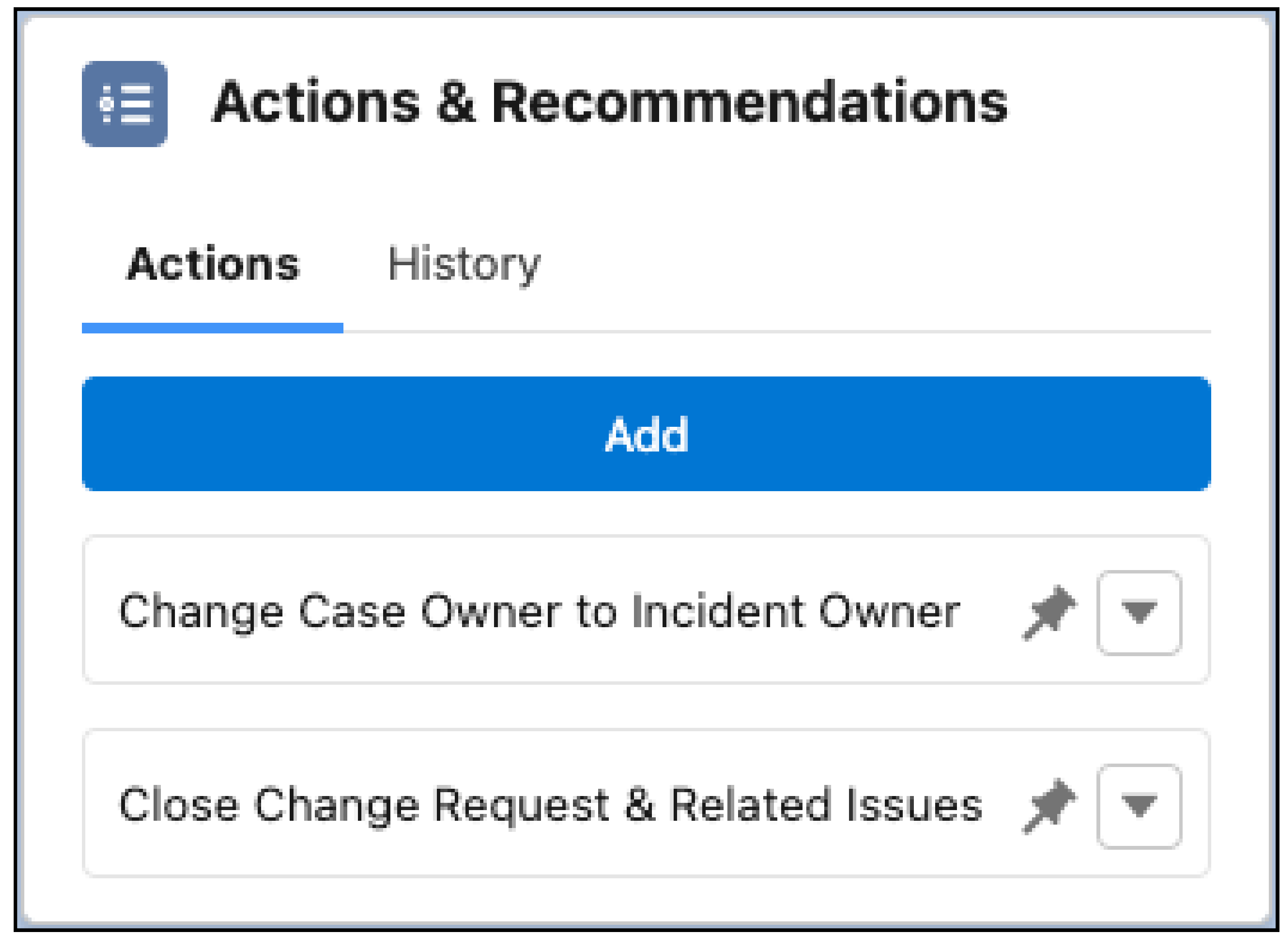
Are you still depending on your employees to manually stop the milestone timer whenever a record exits an entitlement process? With this Salesforce Summer '22 release, that's a thing of the past: the milestone timer now stops automatically when a record exists in the entitlement process. And of course, if that record reenters the entitlement process, the timer resumes from the time that the record exited earlier. With this change, you'll be able to track and report on the actual record handling concerning service level agreements (SLAs), instead of depending on human interference.

Better Incident Management With Slack Swarming and Sample Flows

Salesforce ♥ Slack! 'Swarming' will help you quickly solve customer problems. When a widespread incident occurs, you can now help your customer service and development and operations (DevOps) teams collaborate better. With Slack teams collaborate better. With Slack swarming available for incidents, problems, and change requests, your DevOps teams can get visibility into an incident as they work toward resolution. And your service teams get timely incident progress reports to keep customers updated. Salesforce acquiring Slack is paying off more and more!

How to use the 'Slack Swarming' functionality? Incident Management teams can start a swarm from a record in Salesforce, or they can use the /service-swarm-start Slack slash command.

But there's more on the incident management front. Salesforce is bringing you some powerful out-of-the-box flows for Incident Management - because why reinvent the wheel? Your teams stay productive with cases, incidents, and problems related to a change request that closes automatically when an issue is resolved. Cut down on ownership confusion when cases are identified as part of an incident with a flow that automatically reassigns the case owners to the incident owner. Just clone the sample flows, add any additional steps you might need and you're good to go!

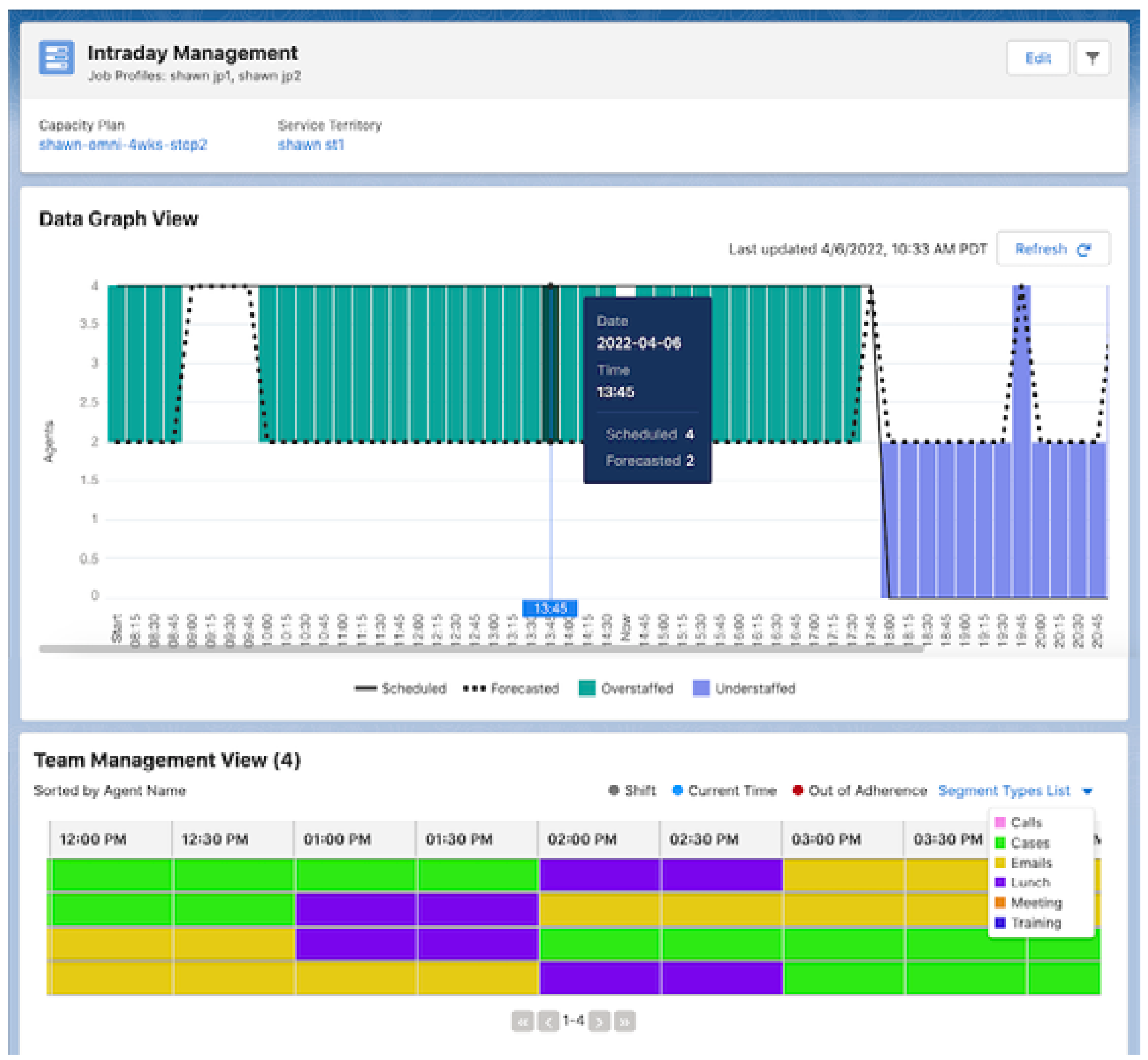


Seamless and Effective Customer Support Through More Channels

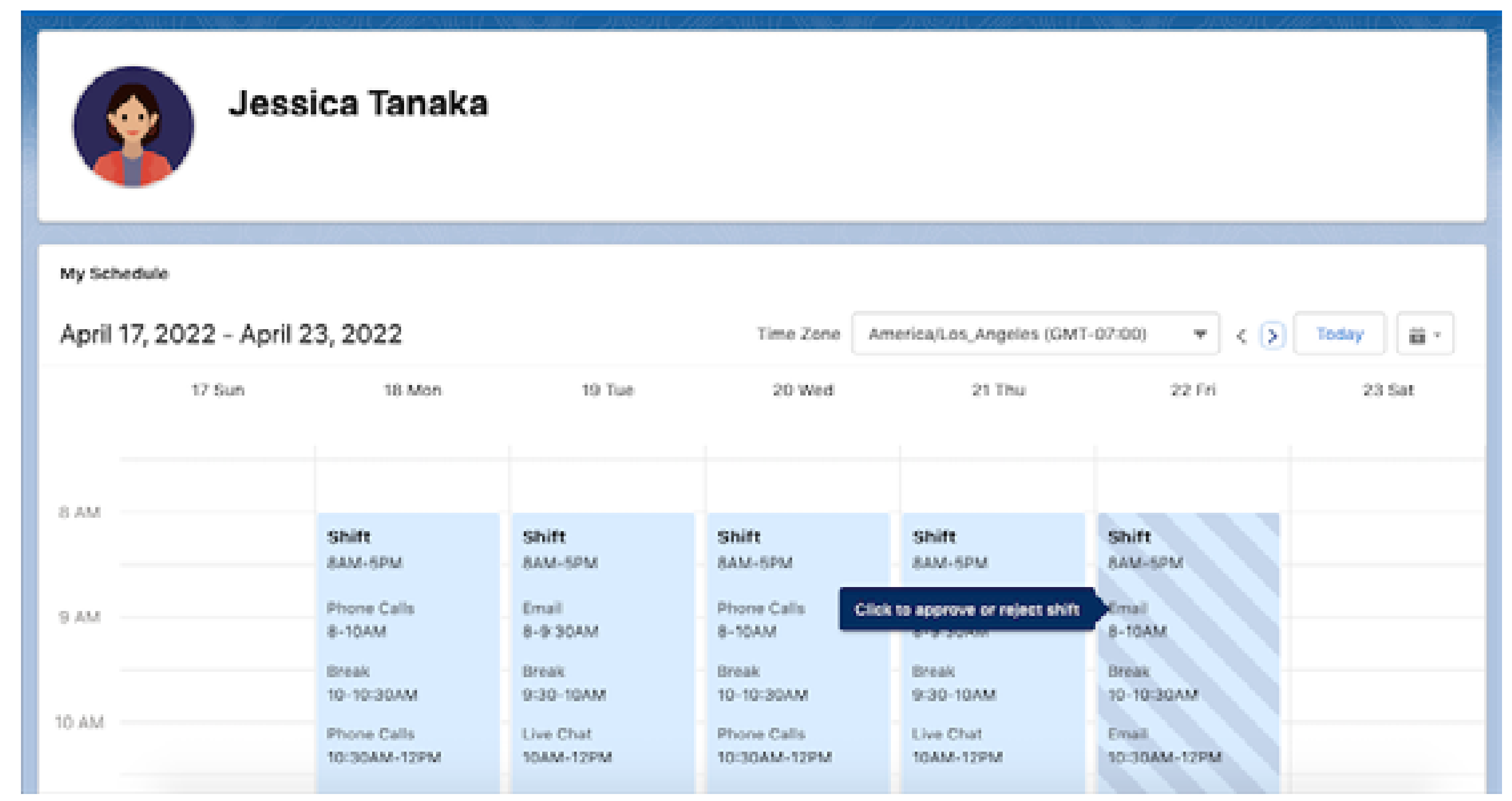
Phone, Messaging for In-App, and Messaging for web were enhanced to now support flag raises and two-way whisper messages. Before this release, only the 'Service Chat' standard channel supported the ability to raise flags and supervisors sending one-way messages to agents. This allows your team to support your customers seamlessly and effectively on complicated issues.

Intraday Management for Staffing Gaps and Schedule Adherence

Intraday Management allows your planners to manage the current business day's workload and track real-time adherence. The Data Graph View compares the number of agents assigned to shifts to the number of agents required for your business day demand. The Team Management View shows agents' schedules and real-time adherence, allowing you to adjust shift segments in your agent's schedule.



You can create shift segments to assign different tasks to the agents' daily schedules. Shift segments can be specific work activities (chat, email, or phone calls), non-work activities (training or meetings), or breaks. Intraday Management notifies agents when they are assigned to shifts or when their shifts are changed. With an interactive Agent Home, agents can review their daily schedules and shift segments assigned to them. Alternatively, you can also create an approval process and flow to let agents accept or decline real-time changes to their shifts.



Read on →

Back to chapters

Patrick Gaspersz
Senior Field Service Consultant

Jefrey Schmidt
Senior Field Service Consultant

Sebastiaan Dammann
Managing Field Service Consultant

Salesforce Field Service

The core use-case of Field Service is to provide excellent routing schedules and insights into appointments in jeopardy. Properly handling Field Service will ultimately help improve the customer experience. In the Summer '22 release, Salesforce has again put lots of effort into optimizing just that:

- **Improve prediction of travel times**
- **Run smarter schedule jobs**
- **Examine the impact of optimization**
- **Provide recommendations on how to improve scheduling**
- **Manage appointment bundles more easily**

In addition to the above, this Summer '22 release will also have some great improvements on the mobile application in stores, such as automatic status changes, or a one-page overview of all appointments, work orders, and absences for mobile workers. To top it off; to minimize a potential Covid infection, customers can now also sign the service report with their device.

Chapter topics

Read on →

Back to chapters

"With the improved scheduling & travel time predictions of the Summer '22 release, planners can further professionalize their schedule, and customers receive a more spot-on estimate time of arrival."

Read on →

Back to chapters

Appointment Bundling

Although Appointment Bundling is already available in Salesforce, a new feature has been added to the package. Live Bundling will respond to the hectics during the day; canceled, updated, and new appointments. Live Bundling will immediately adjust the existing bundles based on your pre-defined criteria.

New appointments that get in might be added to existing bundles. Appointments that do not adhere anymore to the bundle criteria might be removed from the bundle entirely.

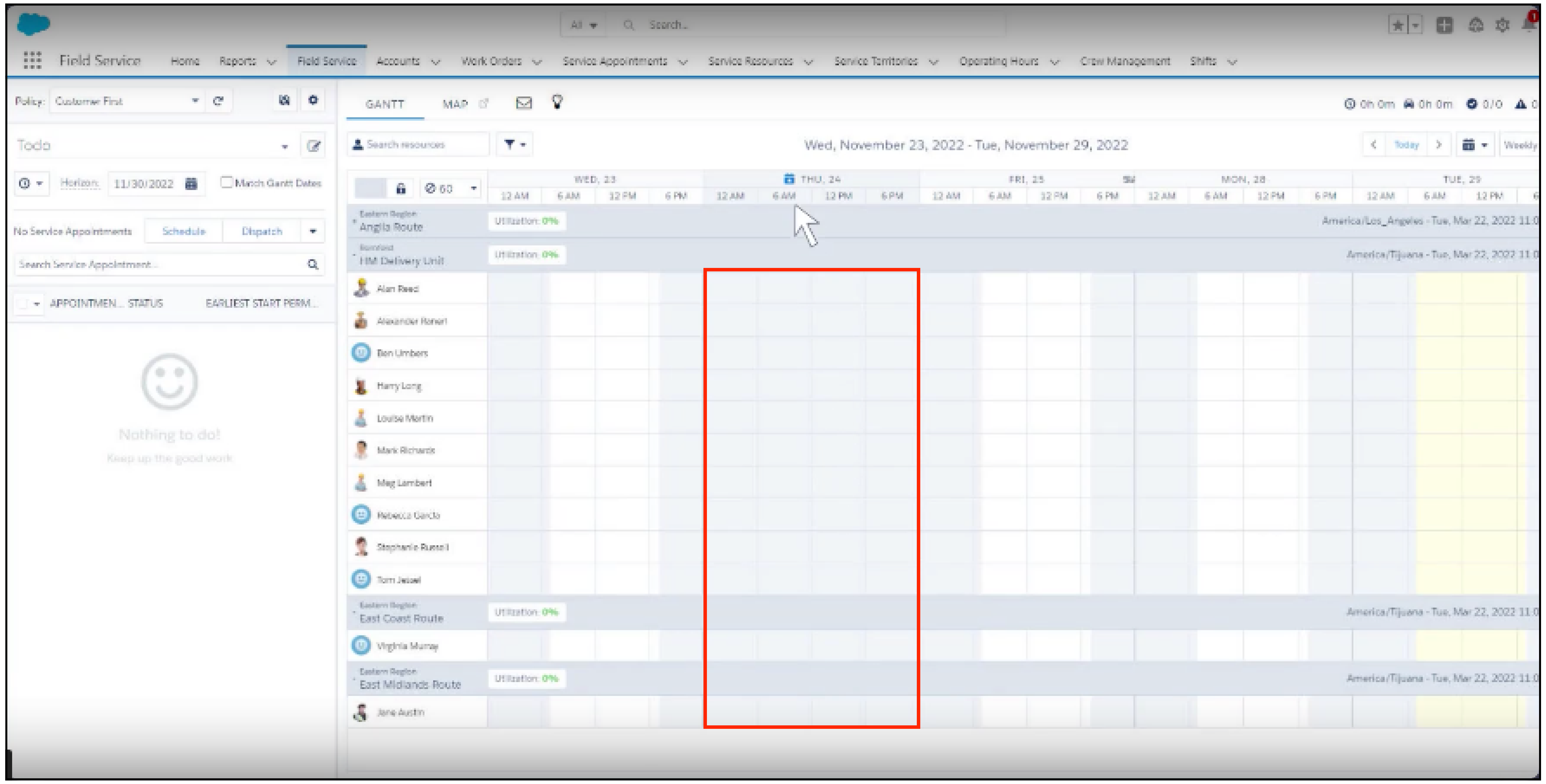
Throughout the day of service, Live Bundling will make sure you have the most optimal bundles, keeping your schedule accurate and efficient.

As an extra new feature, this release offers bundle propagation policies to populate data from the bundle to the individual service appointment, instead of having to update all individual appointments manually.

Read on →

Holiday Management

Management of holidays is usually a cumbersome process. But with the Salesforce Summer '22 release, this is a thing of the past. The new holiday management feature will help you to assign holidays for everyone in one go. Adding the yearly holidays to the operating hours related list and associating the operating hours with the workforce will immediately make all involved technicians/mechanics unavailable for work. The dispatch console will visualize this unavailability perfectly on the Gantt chart.

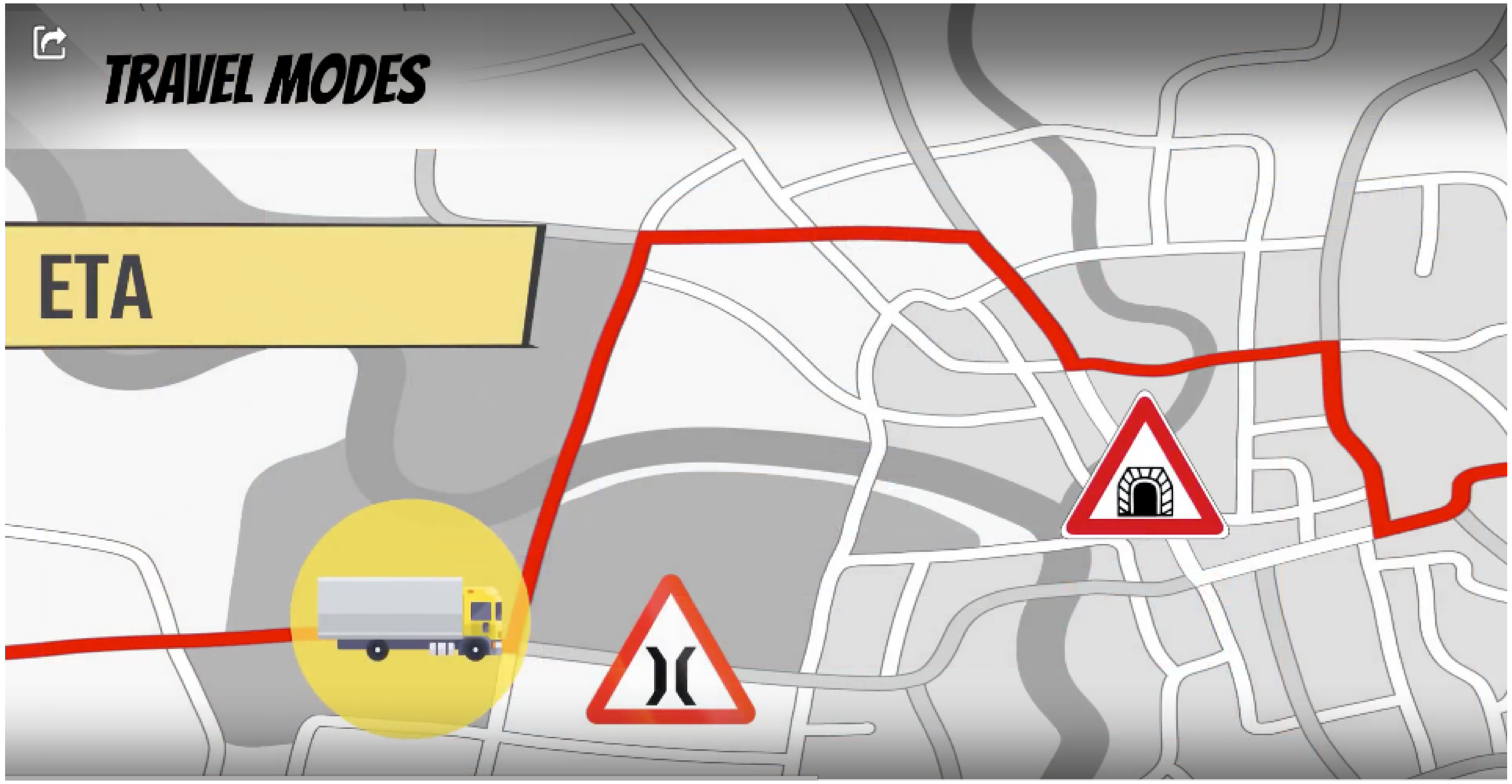


Read on →

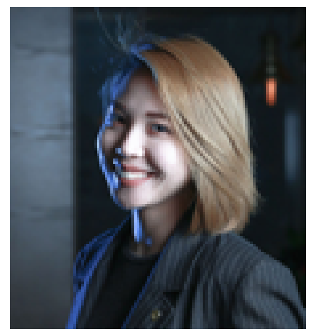
Back to chapters

Enhanced Scheduling and Optimization

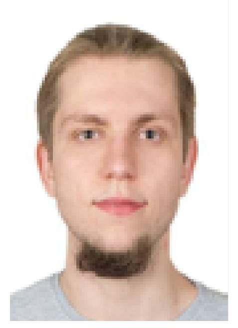
With the new travel mode feature, the optimization engine can take the vehicle type into account when calculating the optimized route, incorporating predictive travel conditions. For example, a large truck will possibly have more obstacles to overcome than a regular car. The travel mode feature will avoid unavailable bridges or tunnels for large trucks; trucks with hazardous material will be diverted along a different route than other vehicle types.



Read on →



Shiwei Chen
Salesforce Consultant



Yura Panchenko
Salesforce Developer

Mille Bonekamp
Salesforce Consultant

Juul Stienen
Senior Salesforce Consultant

Thomas Renkers
Managing Experience Cloud Consultant

Experience Cloud

Salesforce continues the development of Experience Cloud with a range of improvements for users and developers alike. The most important and exciting update of the Summer '22 release is the addition of free CMS functionality for all Experience Cloud customers.

Let's take a look!

Chapter topics

> Free Salesforce CMS Functionality

> Added Functionality of LWR Sites

> Microsoft SSO for Experience Cloud

Read on →

Back to chapters

"With the combination of Salesforce CMS and Experience Cloud you can easily expose Salesforce data to your partners or customers, with an attractive look and feel that you decide."

Read on →

Back to chapters

Free Salesforce CMS Functionality

"Customers with Experience Cloud licenses can now access all the features included in Salesforce CMS, without the need to purchase any add-on functionality." This announcement was tucked away in the final paragraphs of the Summer '22 release notes, but we think it is a game-changer for Experience Cloud!

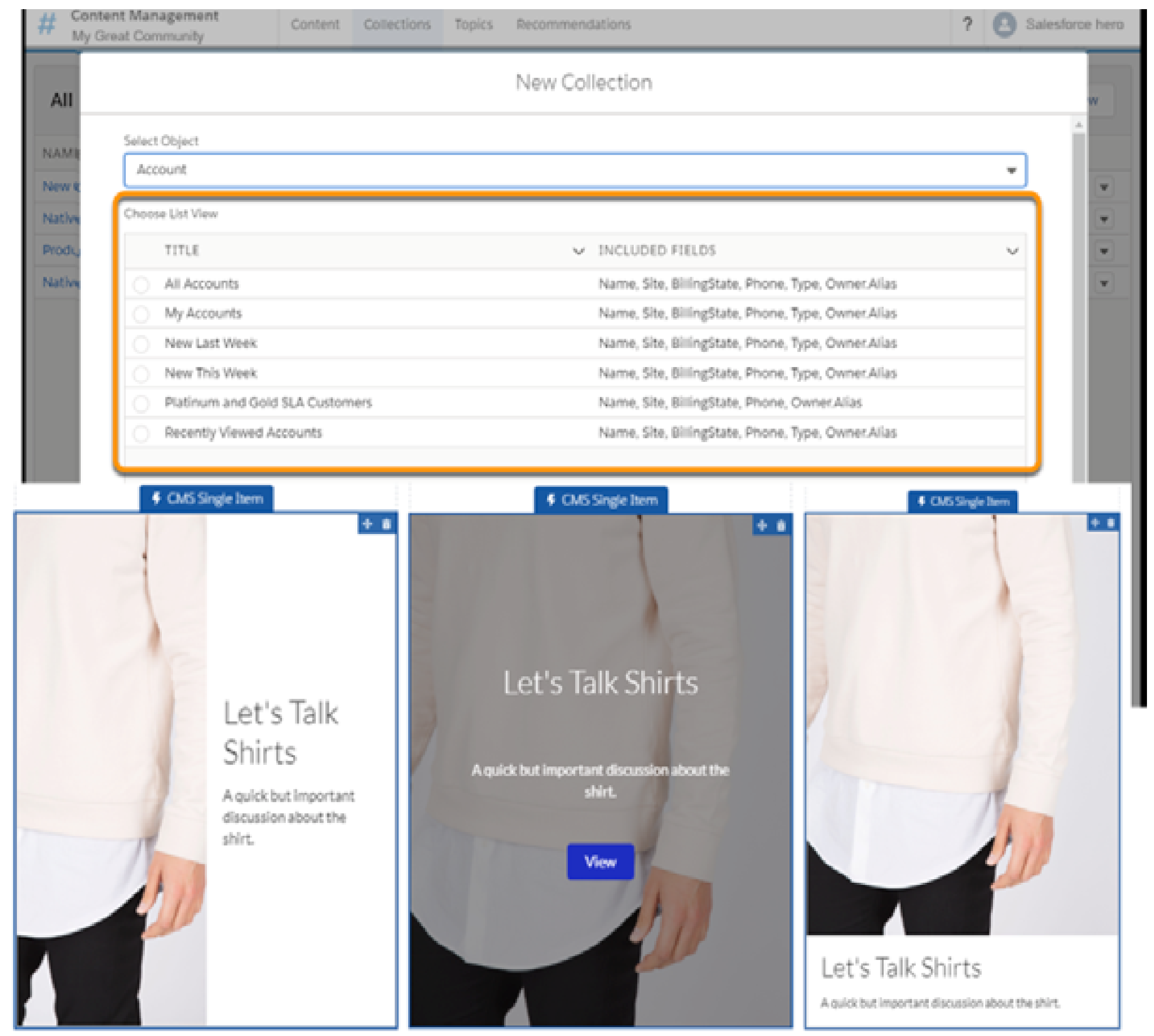
With Salesforce CMS you can easily turn your Salesforce data into content and manage this content from within Salesforce. In its essence, Experience Cloud is a tool to expose Salesforce data and functionality to external users such as partners or customers. Displaying this data in a way that is attractive and functional while keeping it easy to maintain, has always been one of the biggest challenges we've experienced in our Experience Cloud projects. With CMS, these challenges should be solved forever.

Added Functionality of LWR Sites

'Lightning Web Runtime (LWR)' sites let you develop your own fully customized Experience Cloud sites. With the Summer '22 release, a host of new features are added to LWR sites, such as improved search functionality, auto-detection of a user's language, and the option for users to deactivate themselves.

Microsoft SSO for Experience Cloud

It is now possible to set up Single Sign-On (SSO) for your Experience Cloud site with Microsoft credentials. This lets you improve your customers' login experience by configuring a Microsoft authentication provider.



Read on →

Nikolaj Kiepe
Industry Lead
Financial Services

Financial Services Cloud

Not a huge feature release for Financial Services Cloud this time, however, there are some really useful fixes. Silent Record Rollup, for example, allows you to do updates to the household field on a record without updating the 'last modified by' or 'last modified date'. Could prove handy to do so that connecting workflows based on the last modified does not trigger. For the full line-up of the release check it out here.

One thing to take into consideration with this new release is that the FSC Experience Cloud permission sets are changing.

Read on →

Back to chapters

"By continuing to develop on smaller enhancements the Financial Services Cloud (FSC) development team shows that they are listening to the feedback of their clients, making FSC a better product with each release. Some of these small enhancements do, after all, have a huge impact on simplifying the platform for Salesforce admins and users."

Read on →

Back to chapters

Insurance Improvements

For insurance users, there are two cool subjects to review. The first one is the 'Tracking Distributors (independent agents, etc.)' performance on Claims management and Policy admin using a standard out-of-the-box app. The feature comes with an add-on license named FSCAnalyticsPlus but is worth every cent to gain your much-needed insights.

The second subject we would like to highlight is the 'Policy Prediction' renewal app. The app gives insights on the likelihood a policy is renewed, so retention strategies can be used to keep your backdoor closed. This also being a Tableau CRM Analytics studio-based solution is looking very promising in creating simple but effective solutions for people to use in their daily work!

Change in Experience Cloud Permission Sets

One thing to take into consideration with this new release is that the FSC Experience Cloud permission sets are changing. The modifications should have no impact on existing capabilities, but we do recommend (regression)testing before deploying to production!

Personalized Interest Tags on Interaction Summaries

Your users can now add Interest Tags to Interaction Summaries. Instead of wading through meeting notes to find relevant interactions, the Summer '22 update makes it possible to filter interaction summaries based on interest tags. You can structure your interest tags by creating up to three levels of tag categories.

Here's an example: create a tag category called Deal Types, and then add interest tags called IPO, M&A, and Debt Capital Market. Based on client interactions, your colleagues can add Deal Types interest tags to the interaction summary so that it's easy for them to search for later!

Read on

Back to chapters


Gert Jan Loonstra
Domain Lead Data & Analytics


Paul van Alst
Domain Lead Marketing & Sales


Mille Bonekamp
Domain Lead (Field) Service


Ernst Jan de Waardt
Domain Lead Salesforce Platform


Thomas Paschkowski
Managing Consultant


Dico Timmerman
Industry Lead Manufacturing

Manufacturing

With the continued verticalization and focus on industries by Salesforce, Nextview is dedicating a part of this Summer '22 release paper specifically to industries. This chapter is about one of the focus industries within Nextview, Manufacturing.

Where in previous release papers this chapter was about Salesforce Manufacturing Cloud, it is now extended to all the relevant parts of the Salesforce products for Marketing (Pardot), Sales (B2B Commerce, CPQ), Service (SFS, Service Cloud), Data & Analytics (Tableau CRM) and Platform & Mulesoft.

This chapter will introduce you to some interesting features in the Summer '22 release for Manufacturing, for example, in Field Service around Shift Management and in Tableau CRM around handling missing data using Einstein Discovery.

Chapter topics

Read on →

Back to chapters

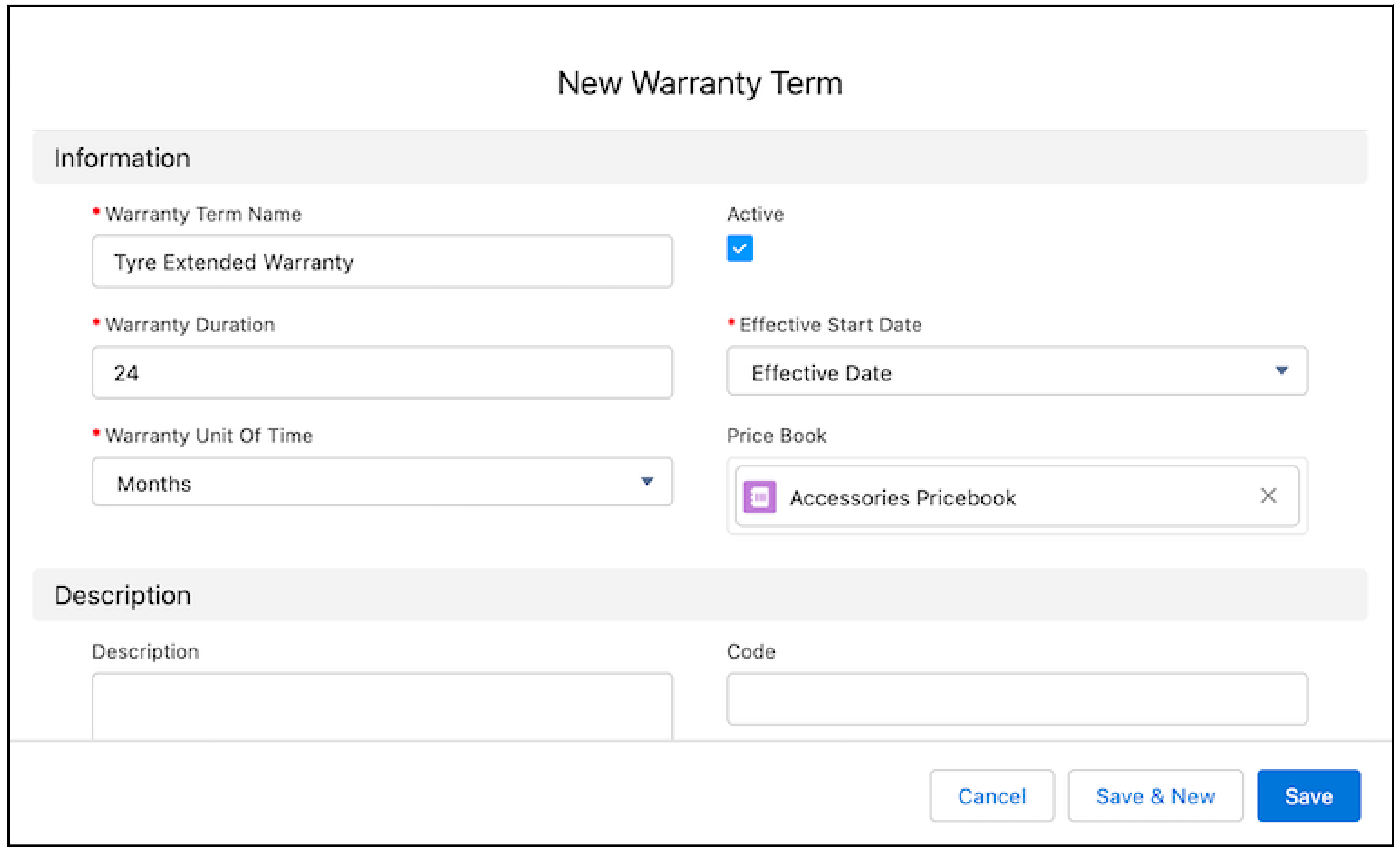
"The predefined templates from this Summer '22 release will make the life of your account managers much easier."

Define Program Templates for Forecasts

Templates are a wonderful invention. They give structure to your processes and speed up the workload. With Manufacturing Cloud you can define these templates upfront so your Account Managers will use them.

Use Templates to Easily Create Manufacturing Programs

The templates can be found via the App Launcher 'Manufacturing Programs'. It offers the ability to choose a predefined template for a particular product. Within these programs, you can add your forecasts via an Import CSV file feature.



Read on →

Manage Warranties with Warranty Terms

With the new 'Warranty Terms' records, you can specify information regarding warranties and connect these to a product or asset. This ensures that all details are captured and easily found; a noteworthy enhancement on the service front!

Optimize Your Resource Management Further

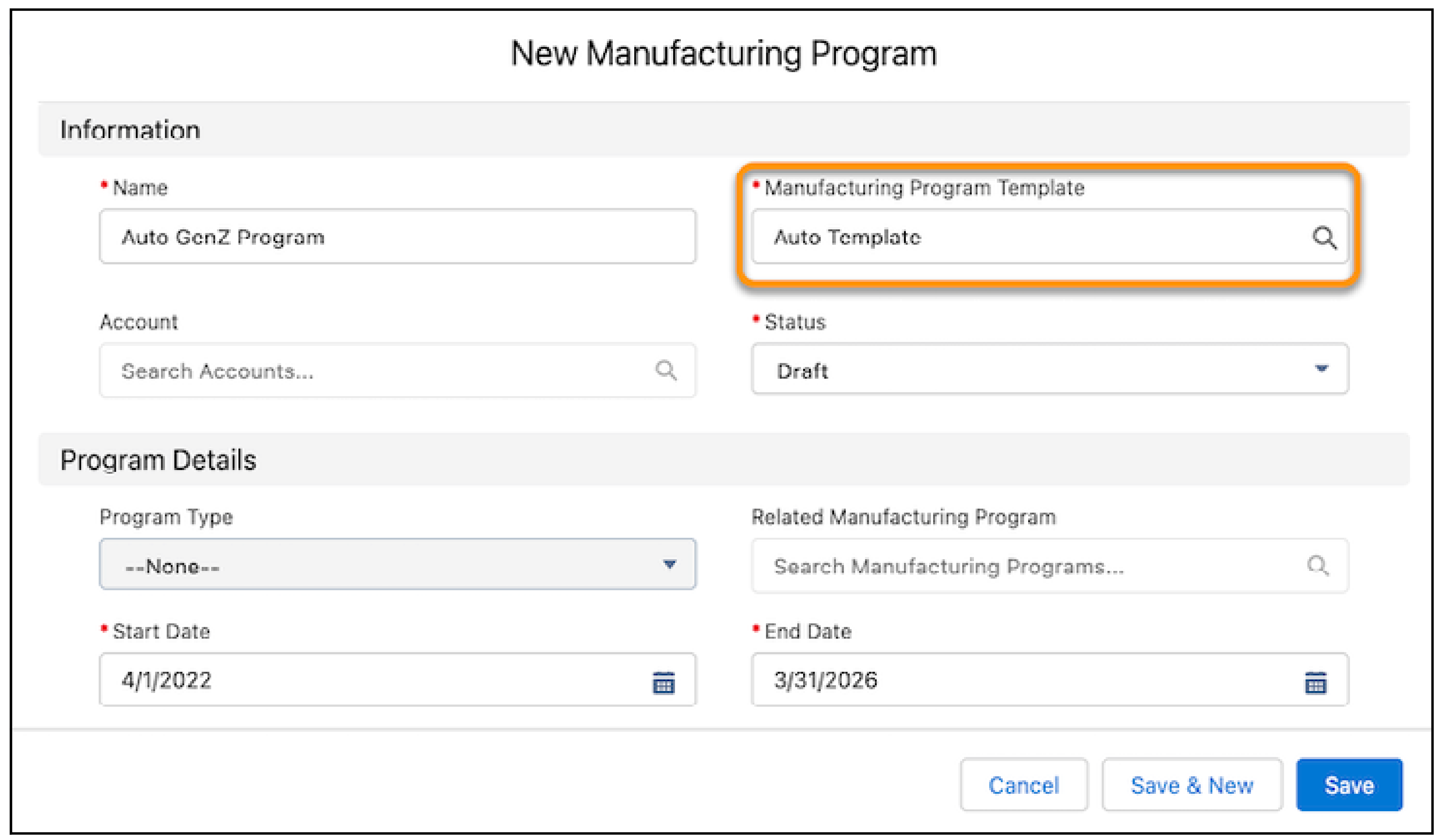
Summer '22 allows for enhanced scheduling and optimization based on territories and territory groups. With Live Bundling, your appointment bundles are now always up to date. Shift management sees a major improvement with the use of shift templates to set name and background color, amongst others, automatically.

Yet another enhancement: react to staffing challenges more easily with improved insights into agent shifts and editing in real-time. The new features also include additions to the Field Service Mobile App, Work Order Management, and Appointment Assistant.

Automate Actions with Incident Management

Now is the time to make incident management more streamlined than ever! With Salesforce Incident Management, you can automate actions after an incident with out-of-the-box workflows for incidents. Less confusion about ownership and better communication via Slack swarming can diminish resolution times considerably. You can now also control and monitor all disruptions by using reporting, dashboarding, and 'Incident Management' integrations.

"The Summer '22 updates provide further automation, optimization, and enforcement options. Some smaller additions to the Field Service package and related objects can make a colossal difference in daily operations for Manufacturing firms."



Read on →

Manufacturing Plan

Enterprise, Unlimited, and Developer Editions that are Manufacturing Cloud-enabled now have the option to create an app from the 'Order Forecasting for Manufacturing' template. The app helps analyze statistical order forecasts to create a reliable manufacturing plan. Quantity values and order revenue values with a confidence interval of 95% ensure reliable statistical forecast data.

Forecast Analysis in CRM Analytics

To monitor the reliability and validity of forecasts and get actionable insights for production and operations, CRM Analytics offers the 'Forecast Analysis' dashboard. Based on forecasted, adjusted, and actual revenue and quantity, Forecast Analysis helps you to improve your forecast accuracy. Forecasts can be plotted against product performance in the 'Product Performance' dashboard in CRM.

New and Changed Objects for Manufacturing Cloud

A quick overview:
- ManufacturingProgram to create manufacturing programs
- MfgPogramTemplate and MfgProgramTemplateItem to create program templates
- ProductRelatedMaterial to define relationships between customers and manufacturing supplier products
- MfgProgramForecastFact, MfgProgramVariantFrcstFact and MfgPgmComponentFrcstFact to manage program, program variant and component facts

Read on →

Back to chapters

More Fields in Actions Plans

An action plan template defines the tasks and other items needed to complete a business process. In a template, each task is given a priority, the number of days in which it must be completed (date offset), and who is responsible. With this Summer '22 release, you now can include up to eight more standard and custom fields when creating new tasks for action plan templates.

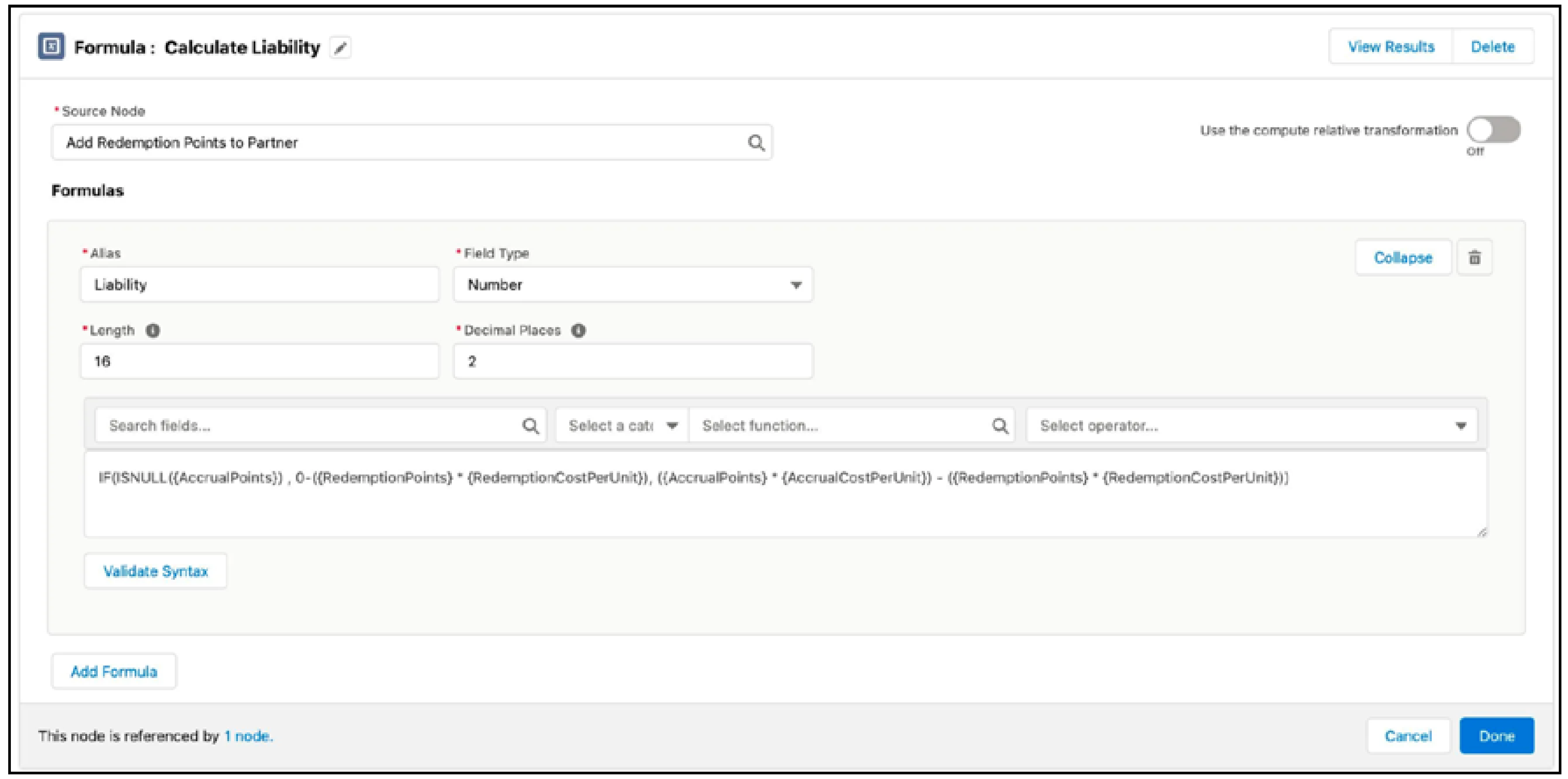
Previously, only a few standard fields were allowed, such as subject, priority, days, and comments. Now, with more fields available, the possibility increases to provide more context on what needs to be done to complete a task. End-users may look forward to less manual work.

Improvements in the Data Processing Engine

The Data Processing Engine helps you extract and transform data that are available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using 'Data Processing Engine' definitions.

Data Processing Engine leverages functionality previously only available to feed Tableau CRM. Using it to load back data in Salesforce or to other systems like Snowflake provides powerful functionality that would otherwise require a separate ETL solution or Batch Apex.

The Spring '22 release contained several enhancements, including the Sum function in a formula, used to calculate the sum of the values that are stored in a field across the rows of a partition. Delete the 'Data Processing Engine' definition runs that you no longer require.



Example of a function used on a 'Node' of a larger 'Definition'

Read on →

Better Performing Experiences

The Winter '22 release optimized your site performance on different levels. The self-registration process for high traffic sites has significantly improved for organizations using account role optimization, making this process 10 times faster. Salesforce has also rolled out a pilot for high traffic sites to bulk-process self-registration instead of processing requests one at a time, which will fasten this process even further in the future.

In addition, all Salesforce org that use enhanced domains now get the Content Delivery Network (CDN) for Digital Experiences to guarantee top-level performance on peak traffic levels. All in all, this offers a great focus on improving performance to meet the demands of your business during peak times.

"The new Sales Cloud features make selling products and services easier and faster, they help companies keep track of their performances and strategically improve weak areas if needed."

Read on →

Back to chapters

Develop Accurate Forecasts and Grow Your Business

Eager to gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations? Using the 'Accounts' Health' dashboard to monitor your accounts' performance based on key metrics for revenue and quantity will help you to take measures to improve your accounts' health.

You can use the 'Account Insights' dashboard to track your accounts' performance based on various standard and custom dimensions, analyze the forecast composition, and identify accounts and products that need attention.

View Account Forecasts with Exactly the Information You Need

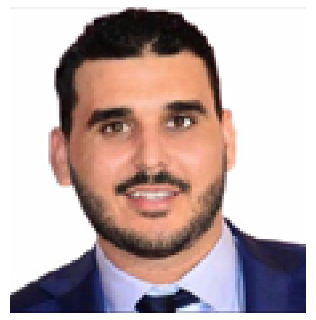
Creating measure groups enables your users to view account forecasts with specific measures, such as the quantity of revenue. In the forecast grid, users see forecasts for measures that are part of the selected measure group.

Boost Partner Collaboration on Forecasts

The last feature we want to list here will boost your partner collaboration. With the enhanced 'Manufacturing Experience Cloud' site template, your customers and partners can view and update the forecast details for their accounts and detailed forecasts for each account that they have access to.

"Gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations. Use the 'Accounts' Health' dashboard to monitor your accounts' performance based on key metrics for revenue and quantity, and take measures to improve your accounts' health."

Read on →



Rafik Salhi
Salesforce
Consultant

Sales Cloud

Companies are becoming increasingly aware of the benefits of Salesforce. In addition, we see them becoming more independent as well. The Summer '22 Sales Cloud release brings new features that improve your company's training and enablement experience. One that stands out is the option to enable Person Accounts yourself, which means you don't need to reach out to Salesforce Support anymore - a very useful feature for storing customer information!

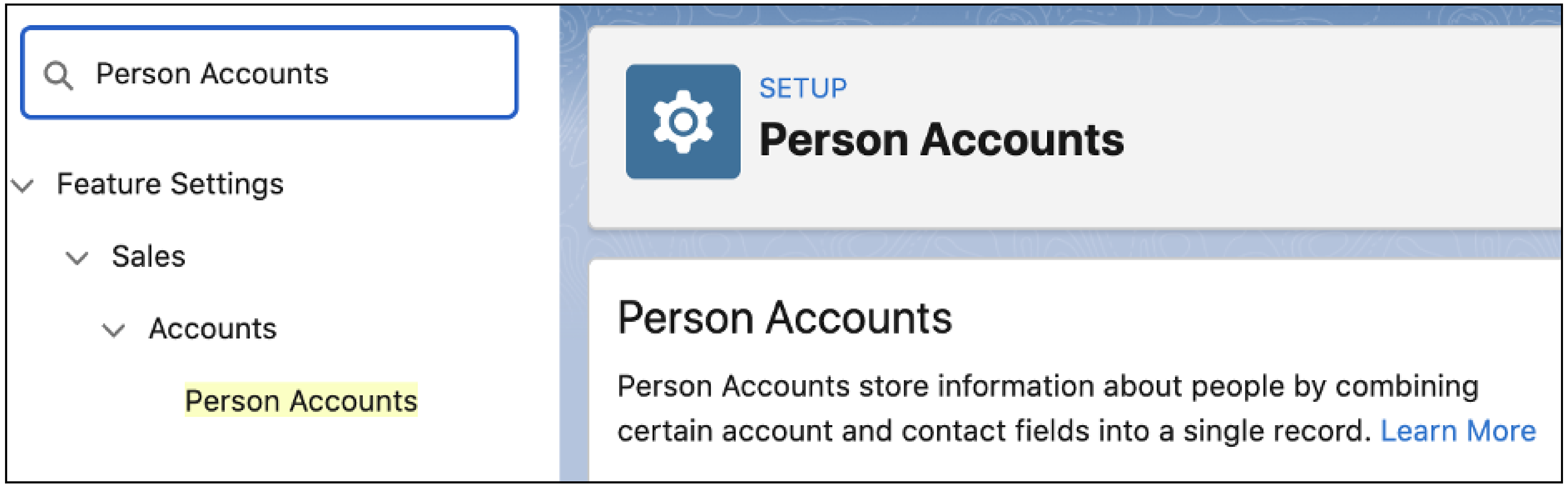
Chapter topics

Read on →

Back to chapters

Core Sales Features

In the Summer '22 release, Salesforce gives Salesforce admins the possibility to enable Person Accounts without reaching out for Salesforce Support. Person Accounts is a good way to store information by combining certain account and contact fields into one record. This allows you to store data about a person in a record that can act as an account when necessary (for example a B2C relation). The feature is available for Salesforce Professional, Enterprise, Performance, and Developer editions.



Note that once you enable Person Accounts this can't be disabled anymore! Make sure to test this feature properly in a sandbox.

You can enable Person Accounts by going to Setup, entering Person Accounts in the Quick Find box, and then selecting Person Accounts.

In this release, Salesforce also makes it possible to customize and filter forecasts to only focus on the data that is critical to your business. Additionally, it is possible to run more forecasts from a mobile device. And when your company uses multiple currencies, you can see the amounts in your forecast when you edit currency values.

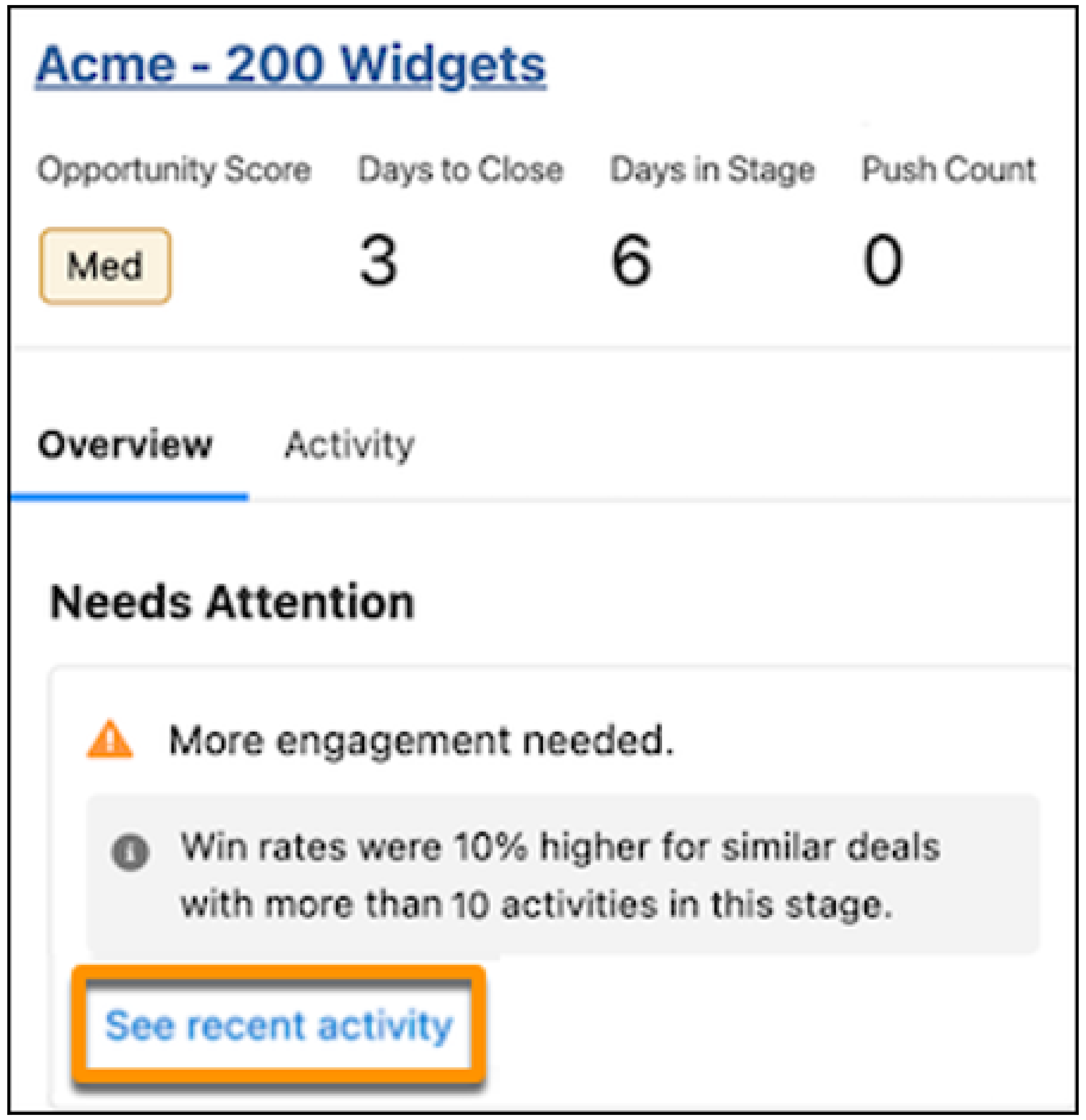
Revenue Intelligence

Another improvement this season is that Salesforce makes it easier to get revenue insights. As of Summer '22, you can use Revenue Insights without enabling Collaborative Forecasts. This is available for the feature Revenue Intelligence in Lightning Experience's Sales Cloud, both in the Enterprise and Unlimited editions.

Pipeline Inspection

Looking for a way to get a broader insight into your pipeline? Well, here it is, with insights from activities, service cases, and opportunity scores. With the New Insights Sources and Recommended Actions in Einstein Deal Insights, your sales team will get a better understanding of deal health in the pipeline. Einstein Deal Insights include recommended actions, so the user can quickly take the next step to close deals.

Curious how Deal Insights with Recommended Actions helps sales reps to close more deals? In the example below you see an insight that indicates that the number of actions is low compared to similar deals with higher win rates. You also see the action that prompts the sales rep to review their activities on the opportunity.

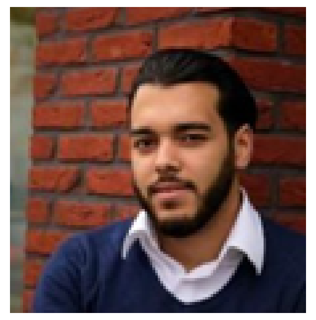


Productivity Features

Also part of this Summer release is the email experience. Now it is possible to use an existing org-wide email address as a default no-reply email address. Eager to send more automated emails in High-Velocity Sales (HVS)? If your company sends emails throughout external services each rep can send up to 1,000 automated emails a day. The HSV automated emails don't count toward your organization's email limits, which is very useful when you are almost or already hitting the ceiling.

Read on

Back to chapters



Achraf Chouhabi
Salesforce
Consultant

Sales Cloud for Slack

As the world becomes more digital each day, organizations can't just stay behind. Salesforce makes it possible for organizations to become more digital and at the same time not lose time and focus by shifting from system to system. That's why we are excited to try out the new Summer '22 release feature Sales Cloud for Slack!

Chapter topics

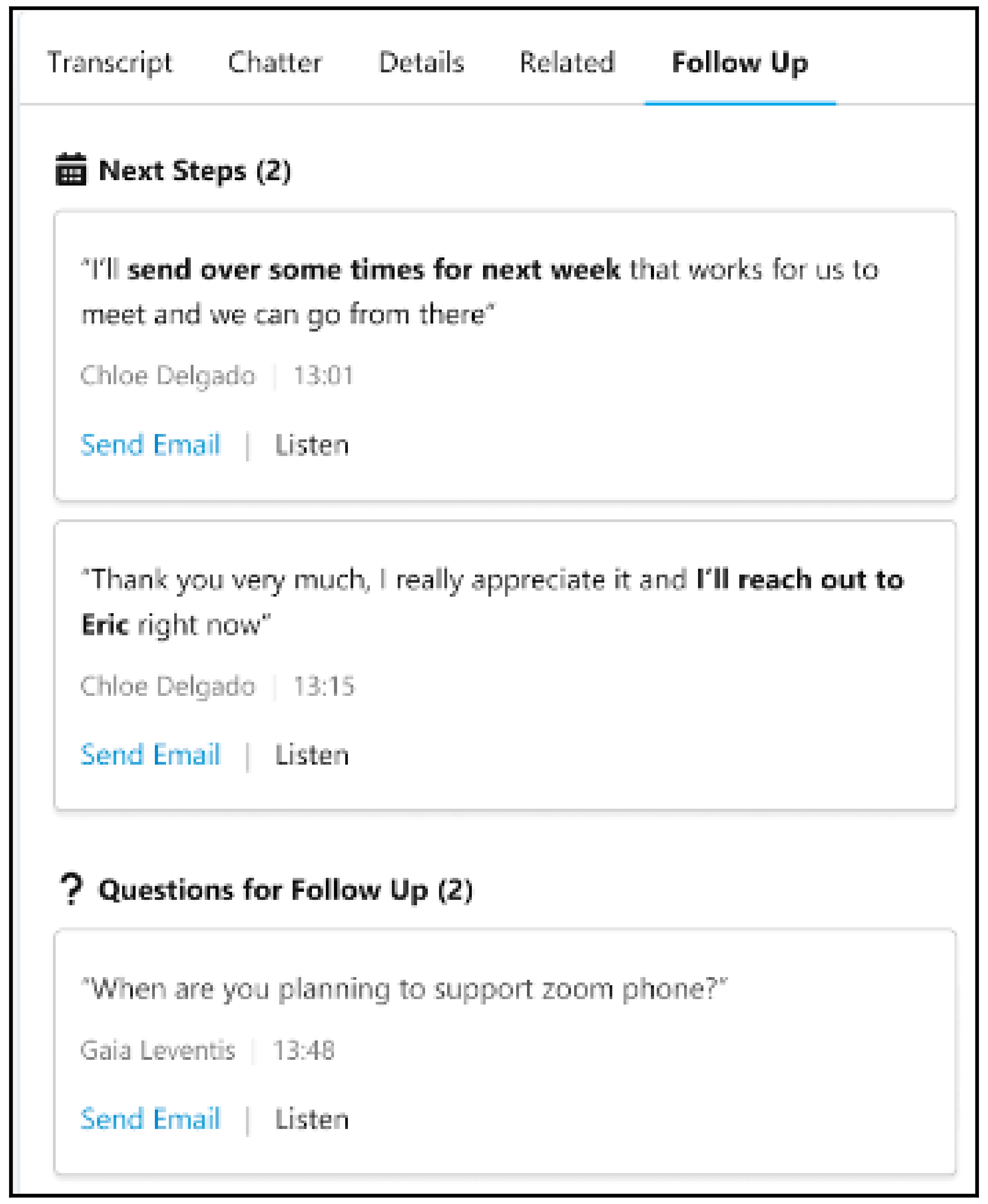
Read on →

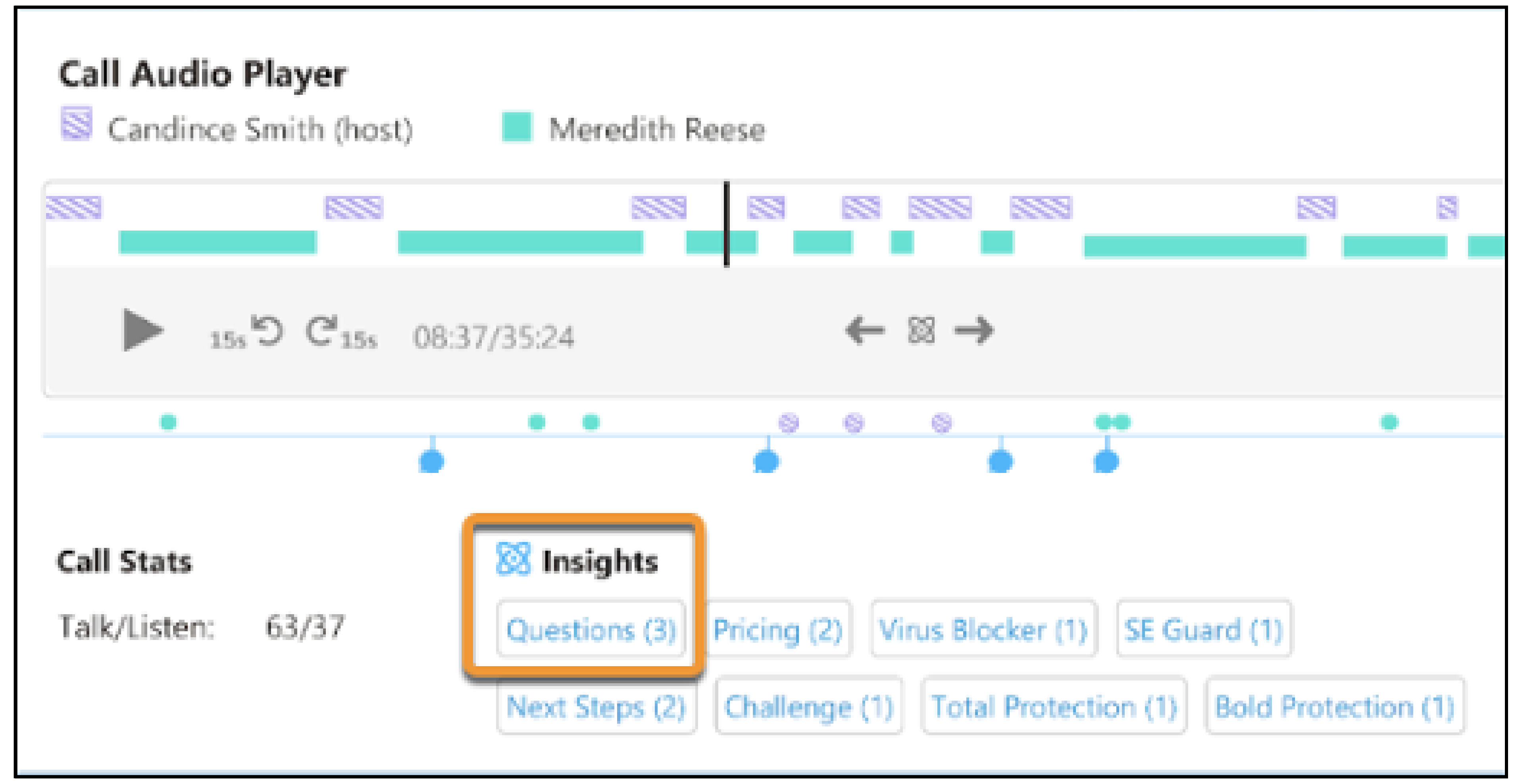
Back to chapters

Einstein Conversation Insights

In this Summer '22 release, Einstein Conversation Insights shows follow-up items for voice and video calls automatically. Now you can receive notifications about follow-up tasks and open questions in your notifications and the 'Follow Up' tab. This tab shows the next steps that were mentioned during conversations and any unanswered questions from the call.

Each follow-up item includes a suggested action, such as sending an email, scheduling a meeting, or creating a task. Sales reps can also easily identify open-ended questions asked during calls with questions insights. This way you will be able to answer all missed questions and deliver even better service to your customers!





Read on

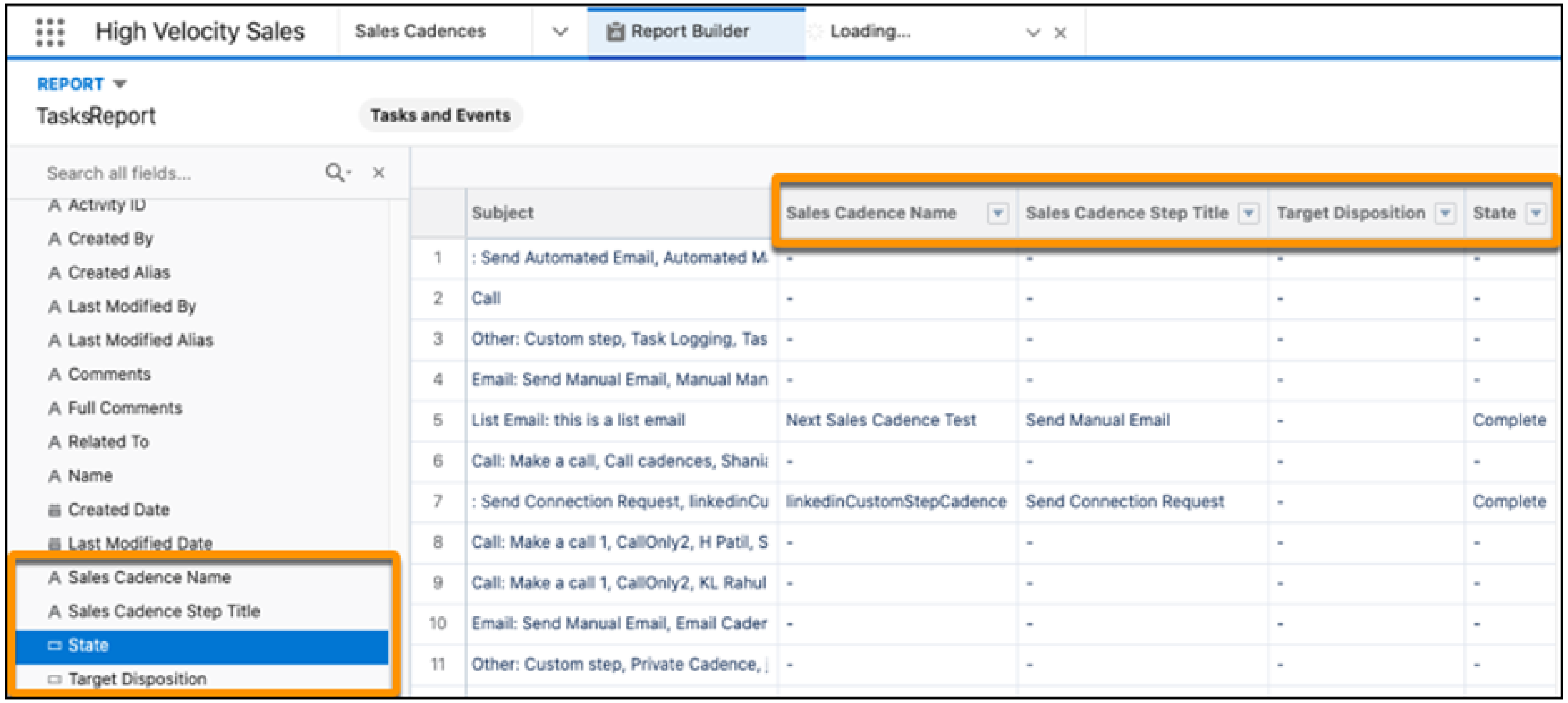
Back to chapters

High-Velocity Sales Will Transform Into Sales Engagement

Sales Cloud High-Velocity Sales is a streamlined solution tailored to your virtual sales teams and designed to speed up and scale up the sales process. Soon the name of the app will change to Sales Engagement, so stay tuned.

One of the included features is Sales Cadences and in this Summer '22 release, it got an update! Now you can see related Sales Cadences in Task Reports. There are new fields available in the Task object reports that let your users see the sales cadences, sales cadence states, sales cadence steps, and target depositions related to each task.

The second update includes that your company can send more automated emails through external services such as Office 365, Gmail, or inbox. Each sales rep can send up to 1,000 automated emails a day!



Read on →

Slack Is Where the Future of Sales Works

Slack became your company's virtual workspace. It connects everyone in your organization and supports the way people work together in person and remotely. It's where collaboration is seamless, information can be found, and your team's favorite apps are connected in one place. That is why Salesforce released another promising feature as a pilot in the Summer '22 release, called 'Sales Cloud for Slack'.

Have your sales teams collaborate on sales opportunities without leaving Slack! Stay on top of your sales and stay in Slack. Sales teams can now access, update, and share records, manage their pipelines, and get important notifications about accounts and opportunities. Check it out in the Sales Cloud for the Slack app. To get started with the Sales Cloud for Slack Pilot, contact your Salesforce Account Executive or file a ticket with customer support.

Sales Cloud Einstein Is Ready With the Readiness Assessor

The updated Einstein Readiness Assessor lets you estimate the value of Einstein Lead Scoring for your company based on your current lead acquisition and conversion numbers. From the Summer '22 release, customers in the European Union who use Einstein Lead Scoring have their scoring model data and scores temporarily stored in both the US and Europe. This updated feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Integrations with Outlook and Gmail

You can add or remove associations between automatically captured emails and related records to improve the quality of your reports, activity metrics, and analytics. Emails from Gmail or Outlook that Einstein Activity Capture users send and receive are now captured and added to the activity timeline of related records.

In the email application pane, reps can now see a selected email's related records and sharing settings. Admins can add quote and contract components to the email application pane in the Lightning App Builder. This will also mean that Salesforce for Outlook will retire from June 2024.

Read on →

Back to chapters

Niek Bachman
Practice Manager

Pardot

The first major announcement Salesforce has done recently is the rebranding of Pardot to Marketing Cloud Account Engagement, which sets a clear vision to include the product more in the bigger picture, rather than having two separate marketing propositions. In our opinion a bold, but right move!

We can't wait for what the future will hold in this regard. But for now, there are also other new features being introduced in the Summer '22 release!

Chapter topics

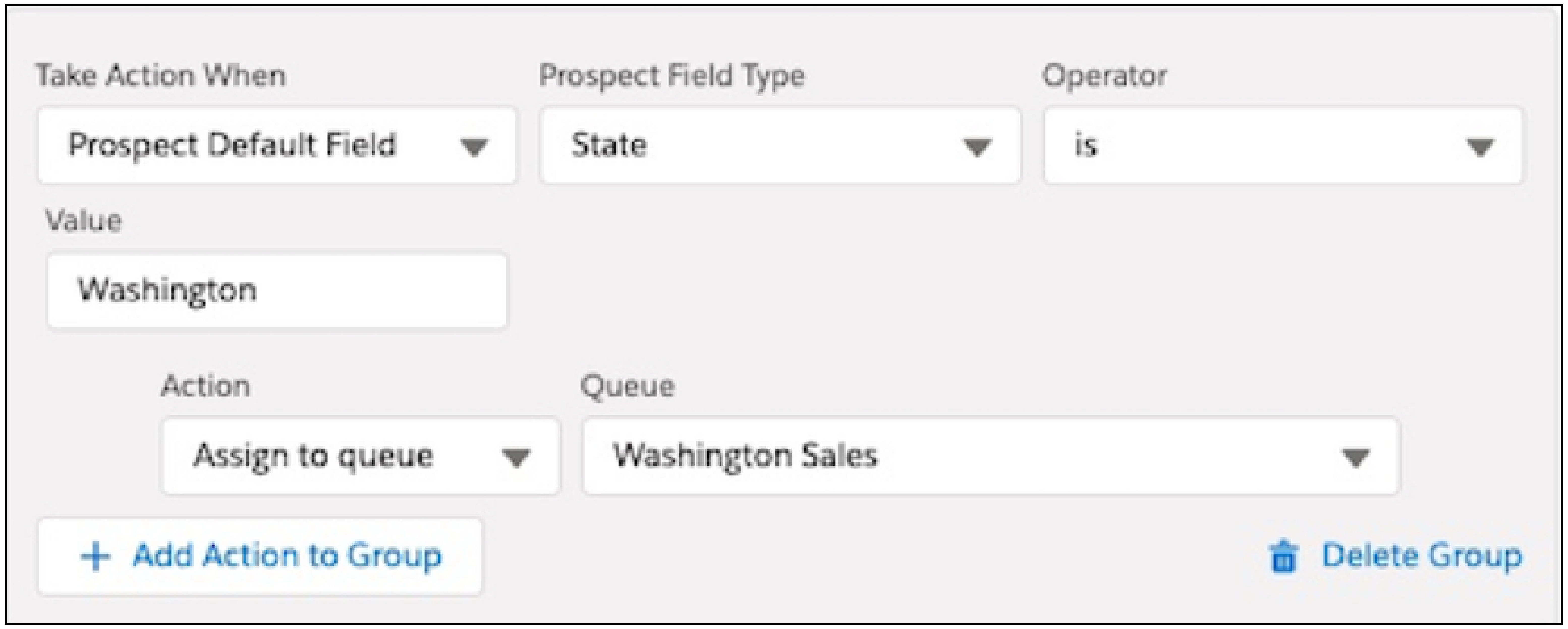
Read on →

Back to chapters

Updates on Completion Actions

To begin with, criteria-based completion actions (and Slack messages)! You can now apply completion actions to a subset of prospects who meet the conditions you specify. For example, assign prospects who live in Atlanta to User A and prospects who live in Miami to User B when they fill out your form. Conditional completion actions are grouped based on prospect conditions, and you can combine both standard and conditional actions on a single asset. This means stronger personalization all the way! Who doesn't love that?

An extra addition is that as a completion action, you can start sending Slack messages! This gives you a very rapid way of notifying the right persons of actions happening on the prospect.



Read on

Campaign Sharing

Another long-awaited feature is campaign sharing with individual users. This feature has been out there in classic for a long time, and is highly needed in Lightning as well of course! Now you can manually share an individual campaign record with another Salesforce user. As a campaign owner, you can set sharing settings and view the sharing hierarchy from the action menu on a campaign record.

Landing Page Enhancements

The last features we want to list here are some enhancements on the landing pages. The enhanced landing page experience now includes support for iFrames in HTML components and several small improvements to the UI. Changes were made on the landing page tab, landing page records, and in the builder. This should all help a lot in being more flexible and easier to set up and manage your 'Marketing Cloud Account Engagement' landing pages.

There are a few other changes worth reading into, like the standard reporting capabilities, but there's one thing you should not forget: the Classic Pardot UI is going to be retired as of October 17th, so please make sure you have your Marketing Cloud Account Engagement to be Lightning ready!

Read on →

Sjoerd Santegoets
Solution Architect

MuleSoft

MuleSoft is the Integration and API Platform of Salesforce. While already being recognized as the only integrated solution for API management and Enterprise Integration, MuleSoft is further enhancing its API Management capabilities. On top of this, it is continuously delivering new connectors and accelerators.

In his Summer '22 release, MuleSoft's progress in facilitating Salesforce integration in different industries stands out. New and enhanced connectors are being delivered for Manufacturing, Financial Services, and Retail. These accelerators speed up developer time and lower TCO to deliver on the promise to connect systems 5x faster.

Chapter topics

Read on →

Back to chapters

"By releasing new and enhanced accelerators for Manufacturing, Financial Services, and Retail, MuleSoft shows it means business by promising to connect systems 5x faster."

Read on

Back to chapters

Universal API Management

In the Spring '22 release paper, we spoke about Universal API Management. Two new components are now Generally Available (GA): Anypoint Flex Gateway and Anypoint API Governance. The features further enhance MuleSoft's existing API Management capabilities into APIs built on other platforms. This truly creates a single source of truth for all enterprise APIs, simplifies the management & governance of APIs across the entire landscape, and improves the reliability and monitoring of all APIs.

New and Improved Connectors

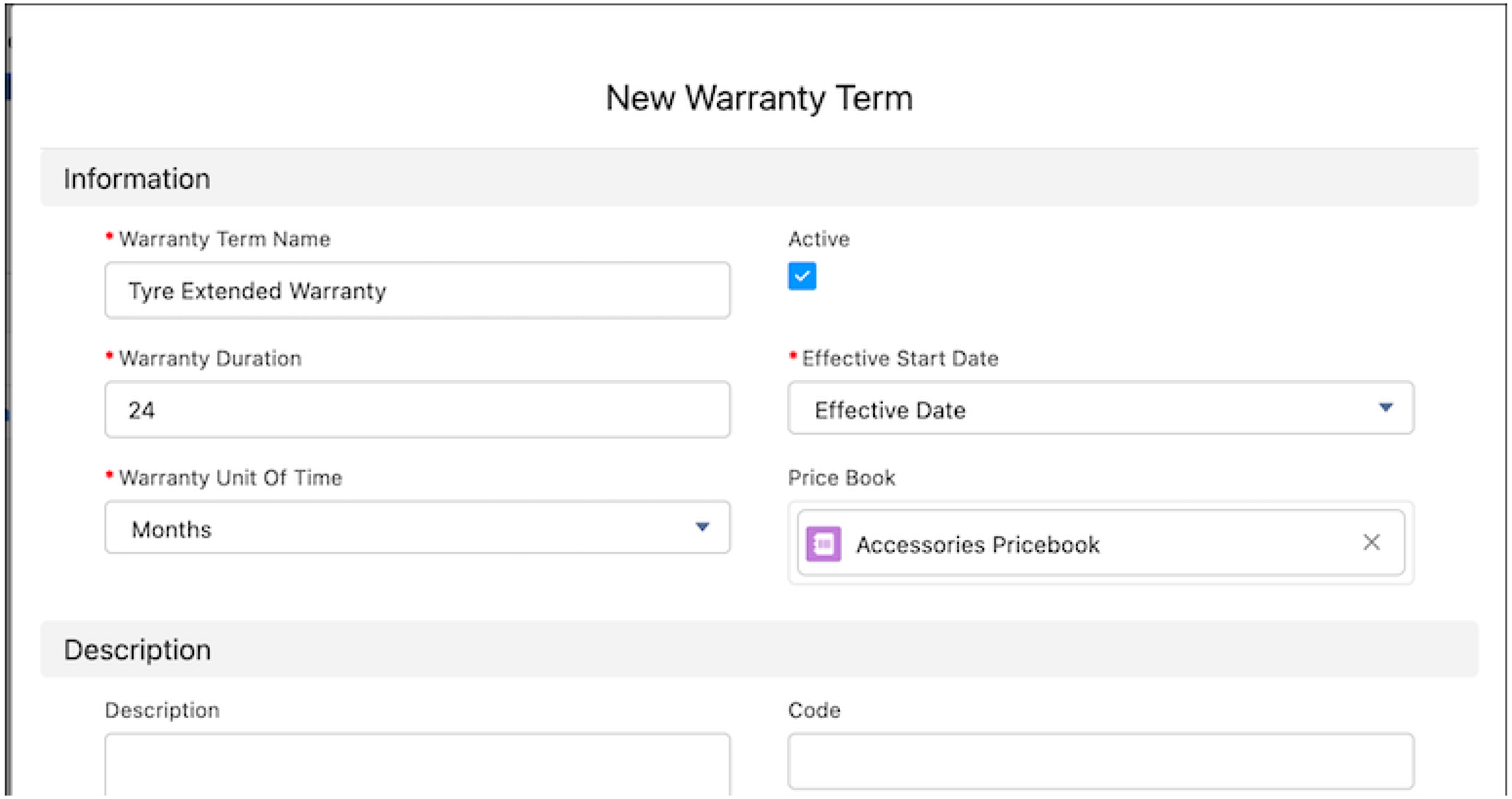
One of MuleSoft's promises is to connect systems 5x faster and with lower TCO. To deliver on that promise MuleSoft keeps releasing new and improved connectors. One important new connector is the one for Google BigQuery. This connector helps customers load, extract, and query data into and out of BigQuery. This is especially interesting for customers running their data lakes on Google BigQuery, something we see especially often in marketing where these data play an important role in the customer 360.

Read on →

Accelerators for Salesforce Integration

Next to connectors, accelerators play a key role in achieving faster integration at lower TCO. On this front MuleSoft has made quite some progress:

- A new accelerator has been introduced for Manufacturing. This use case gives manufacturers a unified view of their customers by syncing customer and order data seamlessly from SAP S/4HANA into Salesforce Manufacturing Cloud.
- A new release for the accelerator for Financial Services is available. It now includes the modernization of the payment use case, which is built to support the accelerated delivery of modern payment solutions for financial institutions.
- Finally, a new release for the accelerator for Retail is announced. This release includes the Personalization use case, which synchronizes and unifies customer profile data into a customer data platform so that you can personalize interactions by customer segment.



Read on →

Ernst-Jan de Waardt
Salesforce Solution Architect

Robert-Jan van Erp
Salesforce Solution Architect

Ata Khan
Technical Architect

Salesforce Platform

With the Summer '22 release, Salesforce Platform once again proves to be one of the strongest customer success platforms. We are happy to announce more focus on point and click tools like Flow, platform events, increased security and sharing features, and other improvements to the UI. Let's dig into some of this!

Chapter topics

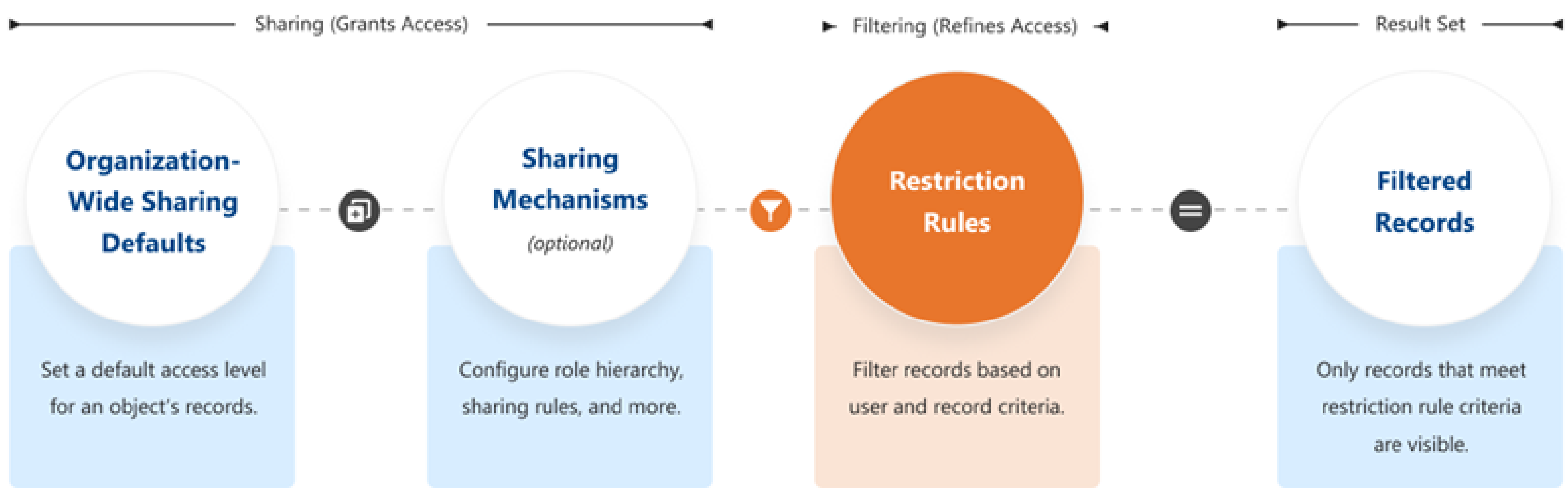
Read on →

Back to chapters

Sharing Restriction Rules

It is not so often that a feature as fundamental as sharing is updated. With the Summer '22 release, however, an additional layer is added to the sharing model, providing the possibility to restrict access to records. In general, access to records is determined by several mechanisms. This means that as a user you see data because of settings in the Org Wide Details, or say sharing rules that give you access to records in your region.

Restriction Rules are applied after the normal sharing and can limit access to data that you would normally be able to see. A good business case for this feature is where 'in general' all data should be shared with a user, but where some data (say contracts related to celebrities) should be accessible to only a dedicated team of users. This way the structure of the 'normal' sharing using grants can stay simple and straightforward, while at the same time some specific data can be restricted. This functionality can only be applied to a record level and for Contracts, Tasks, Events, and Custom Objects.

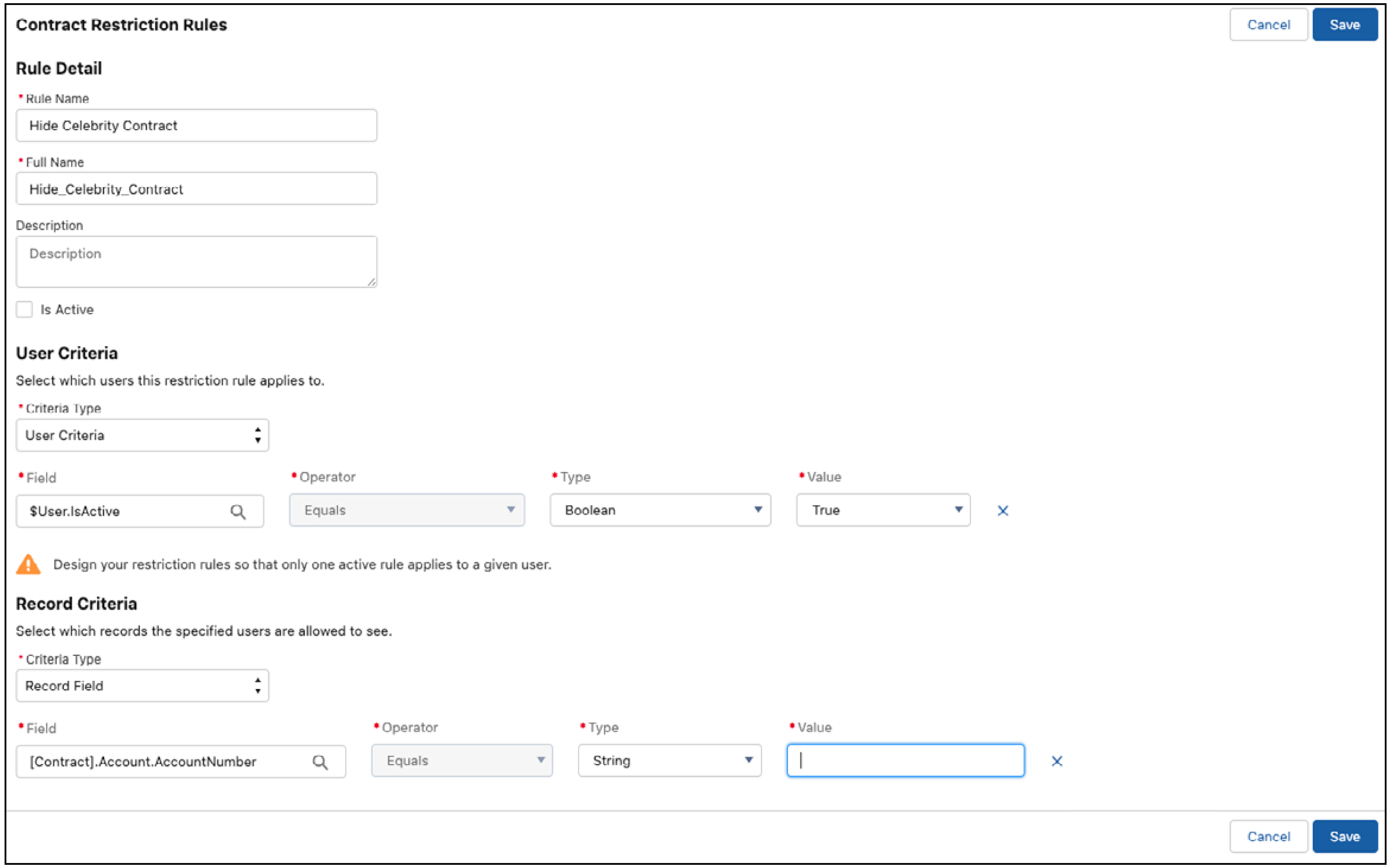


Read on →

Back to chapters

The screenshot shows the structure of Restriction Rules, starting with the Rule Name and details followed by the group of users to which it applies (which can be as generic as all active users). Finally, the records the user should be allowed to see are specified.

Another nice extra is that the restriction rules can be used in combination with external data sources. So far no sharing mechanisms were available for that, which means it would require custom solutions and extra care in sharing this data with end-users or even customers via Experience Sites.



Read on →

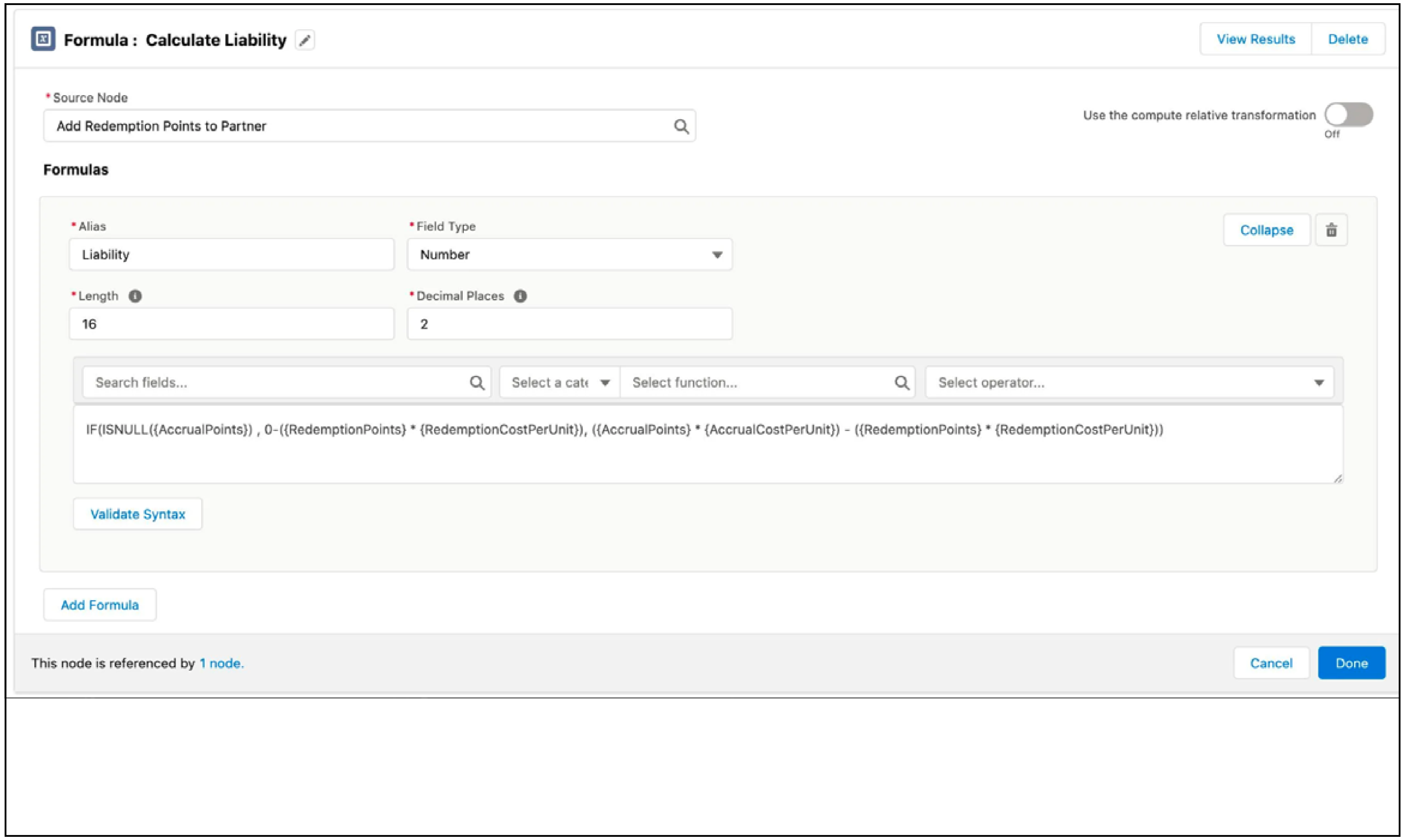
Back to chapters

Customize and Filter Related Lists in Lightning App Builder

Single related lists could already be added to a Lightning page (note that it needs to be in the related lists of the 'old style' page layout). With this release, it becomes possible to select fields, apply filters and determine the sort order using the 'Dynamic Related List - Single' component. So far this was only possible using Appexchange solutions like the CMTD Enhanced Related Lists, where part of the configuration is hidden in Custom Metadata.

In the screenshot, a Large Quote Related List is added to the Opportunity page. Only Quotes with a net amount over 500k will show. The fields themselves can be selected under Related List Fields on the right part of the screen.

As with most components on a Lightning page, this list can be shown or hidden conditionally which gives you great flexibility on how to build up your page all controlled by the Lightning App Builder.

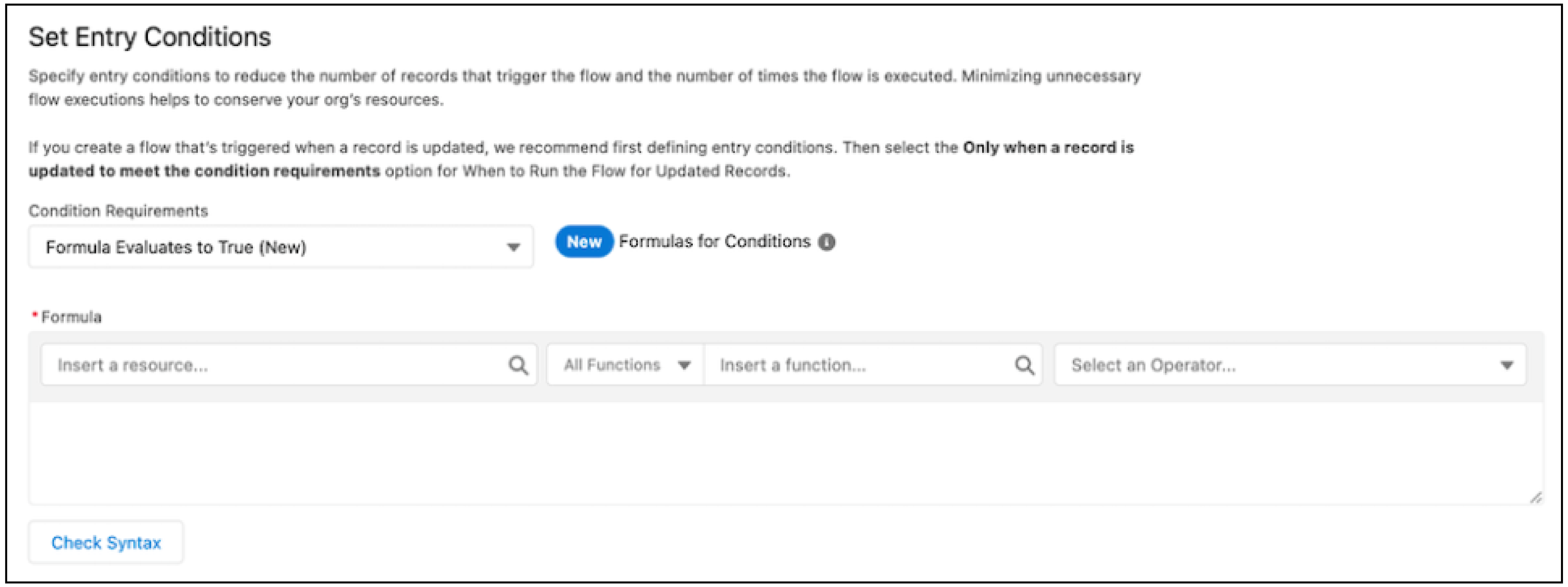


Read on →

Back to chapters

Flow Improvements

Summer '22 has made flow much more interesting for the admins who would like to show off their point and click skills to solve real-life business challenges. The new flow allows admins to use formulas in flow entry conditions, use custom icons for Apex-defined invocable actions, add a new section component to mwake screen flows more lucrative, and also test and debug flows in the flow builder.



Use Formulas as Flow Entry Conditions
A formula builder is now available in the Start element of a record-triggered flow. The builder guides you through the syntax and simplifies the process. Additionally, instead of waiting until you save a flow, you can check the formula syntax and catch errors as you work.

Read on →

Back to chapters

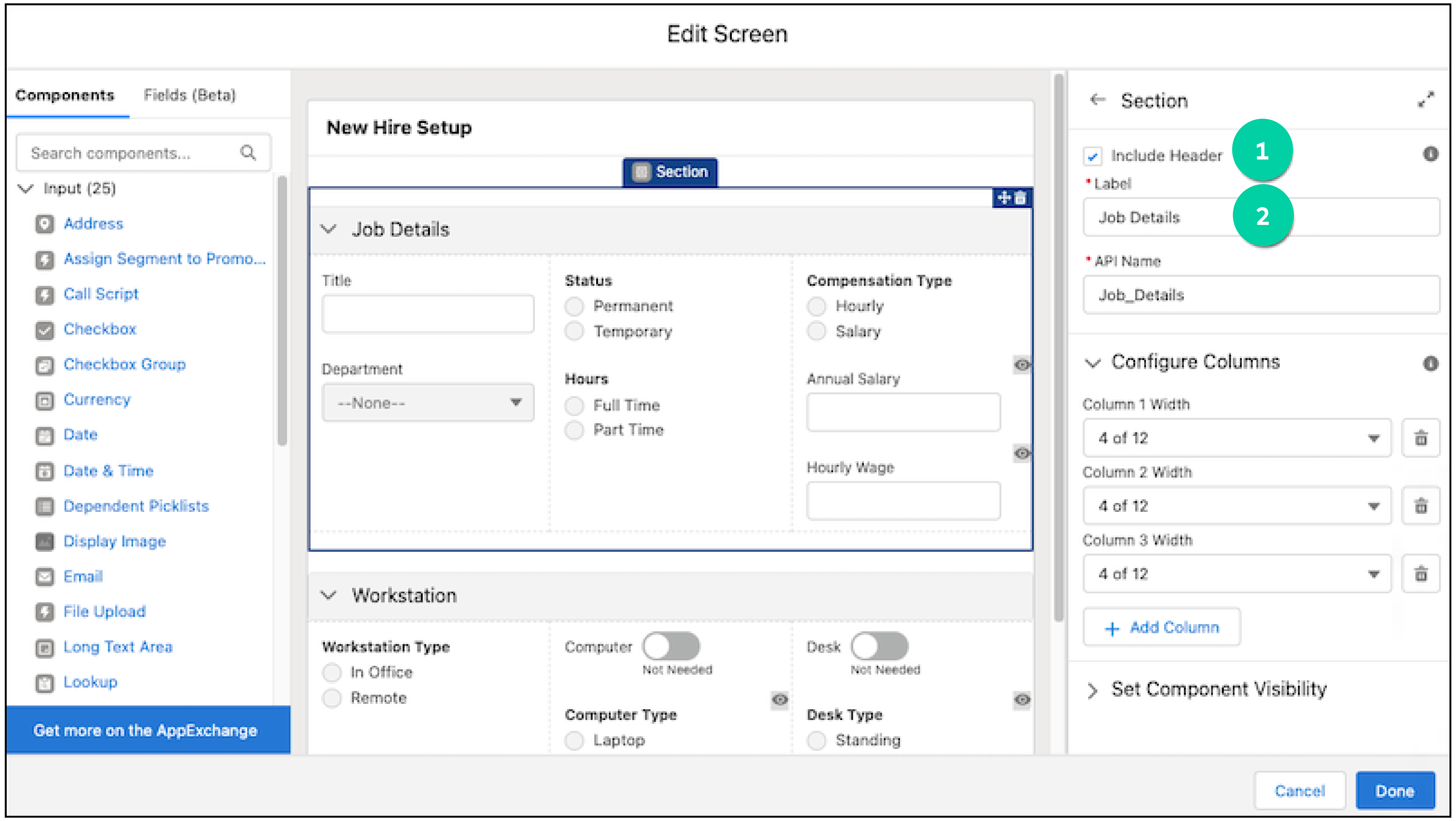
Add Section Headers to Flow Screens

Use section headers to create a visual hierarchy to guide your users to the most important items on screen. Sections with headers are collapsible and always open by default to make screen flow completion more efficient.

Flow Testing and Debugging (Beta)

With the Summer '22 update, Salesforce allows admins to create, save and run flow tests. Previously, we debugged flow manually to troubleshoot failures each time they occurred. Now, you create and save a flow test from a debug run. Each time you modify the flow, you can run the test. You can only test flow paths that run immediately. Flow tests don't support flows that run when a record is deleted.

Of course, this is just the beginning and there are a bunch of limitations. But the future seems to be promising considering the efforts the Salesforce team is putting into making our lives better and saving us a lot of time! Note that you can also set up Apex test classes to test your really important flows.



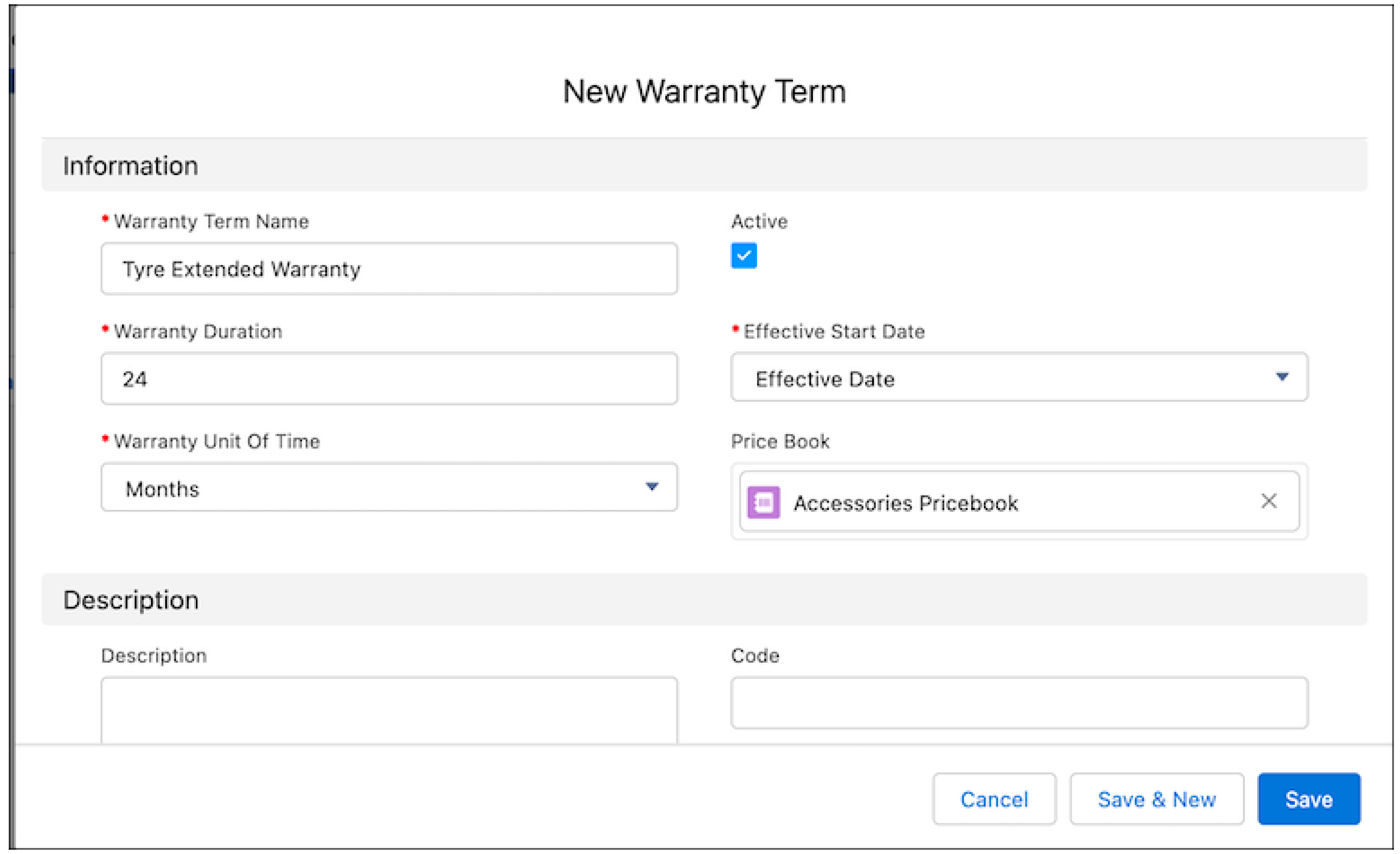
1 Select to include the header
2 and then enter the header label.

Read on →

Back to chapters

Manage the Run Order in the Flow Trigger Explorer

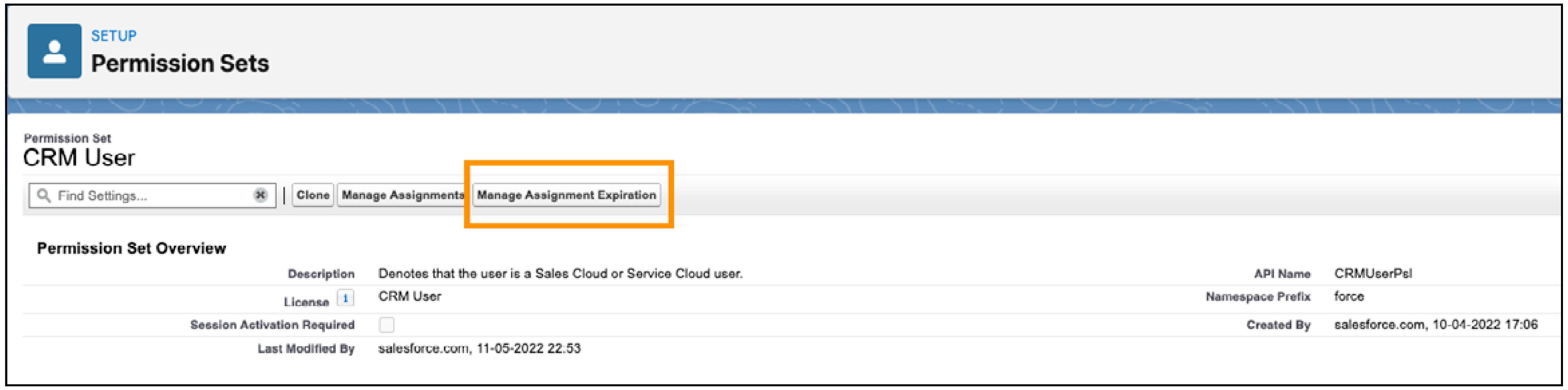
Another enhancement is that Salesforce now allows us to easily change the order of record-triggered flows by dragging them into place. Flow Trigger Explorer lets you manage the run order of record-triggered flows without opening and editing individual flows.

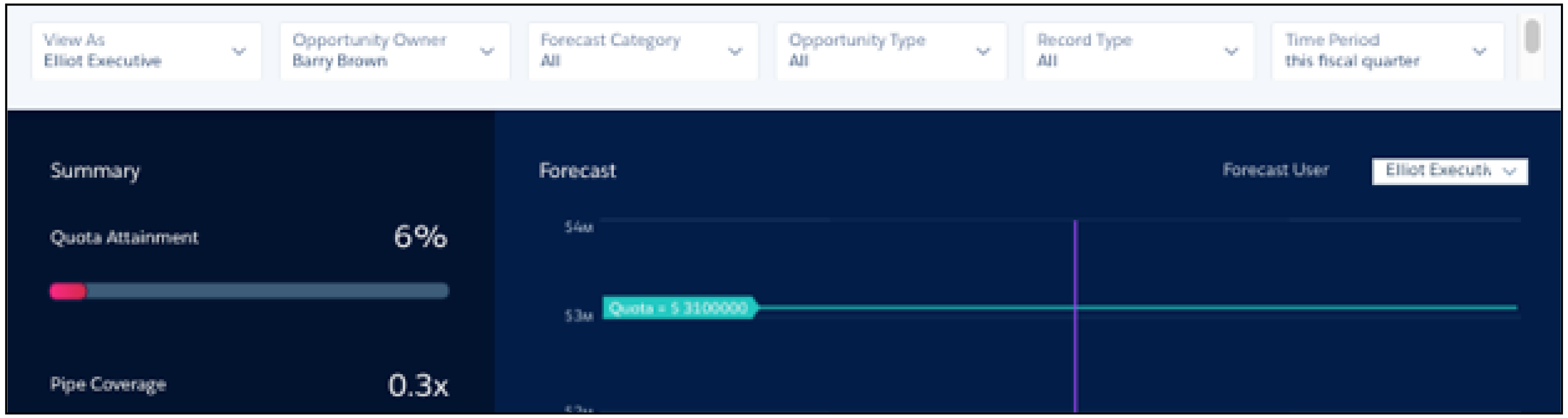


Permissions

Summer '22 has finally delivered some of the basic but crucial updates regarding the permission set! Salesforce now allows us to set expiration dates on each permission set/permission set group that we create. By default, permission set and permission set group assignments don't expire.

A simple use case for this feature would be a random request to the Salesforce admin to assign certain permissions or access to a user while a colleague is on vacation for a few days. The admin can simply add the permission set/permission set group to the user in context for a certain duration and doesn't have to bother anymore to take it out when the colleague returns from vacation. This small feature takes off some load from the admin's shoulders.



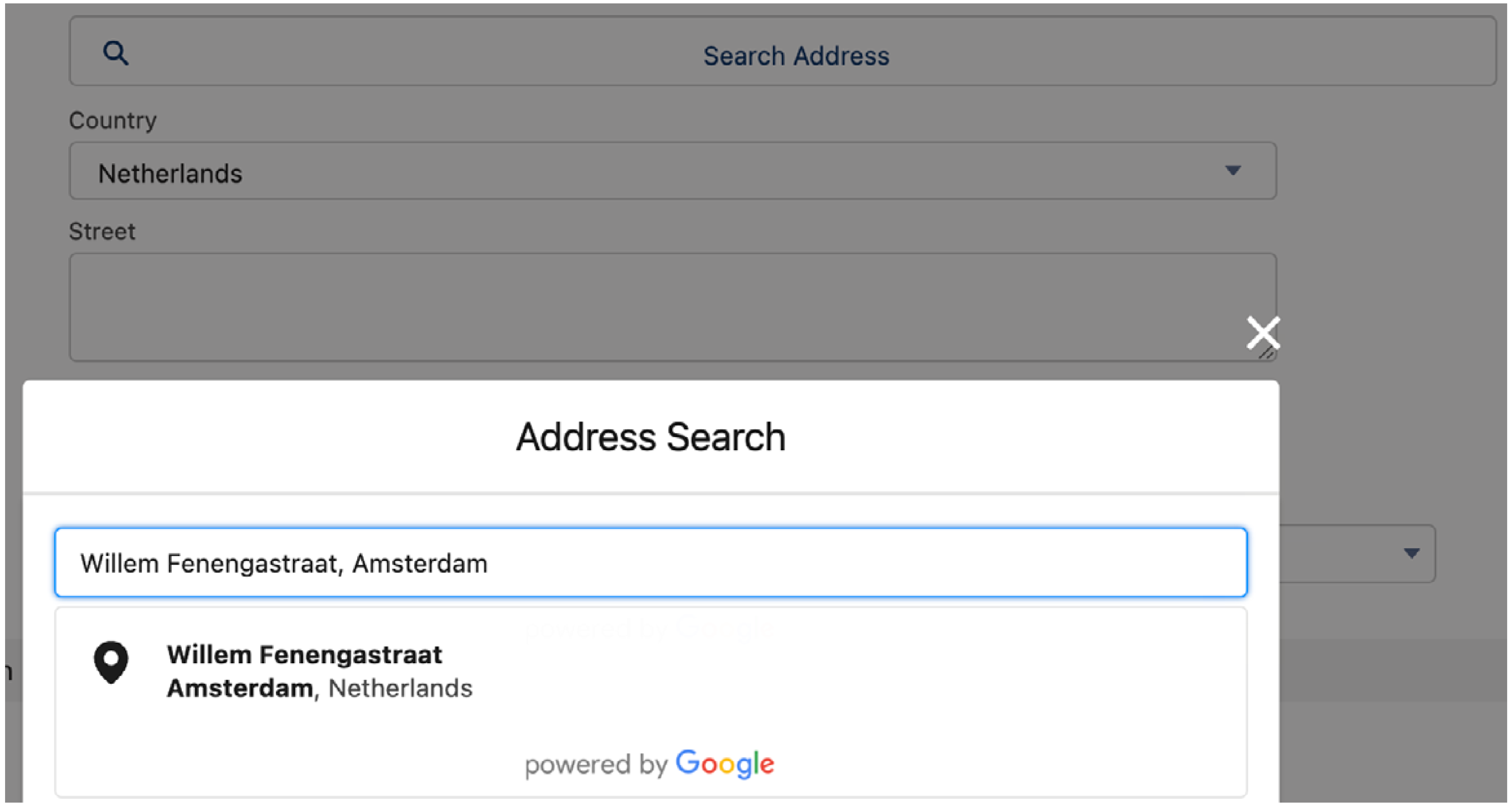


Read on

Back to chapters

Create New Address Fields (Beta)

The request to create a custom address field was open for almost 15 years. Now finally, we have the option to do this! Before you only had the standard address field(s) available on objects like Contact, Account, or Work Order. We are very happy that it's now possible to create this type of field on a custom object. This gives users a uniform experience and the functionality to quickly search for an address via Google Search.



Beta Functionality That Now Is GA

The best practice from Salesforce is not to use beta functionality in your production environment. So we are happy that this new feature is now Generally Available (GA): Inline Edit Reports Update Multiple Fields. The feature was covered in the previous release paper. Take a look right here.

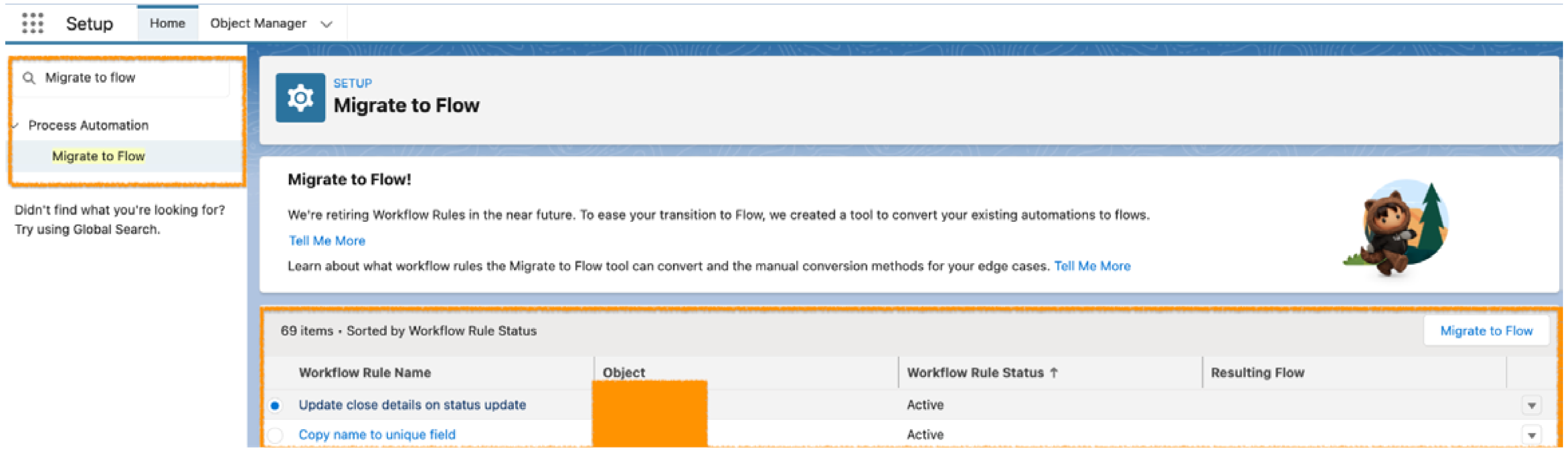
Find out more by clicking here

Read on

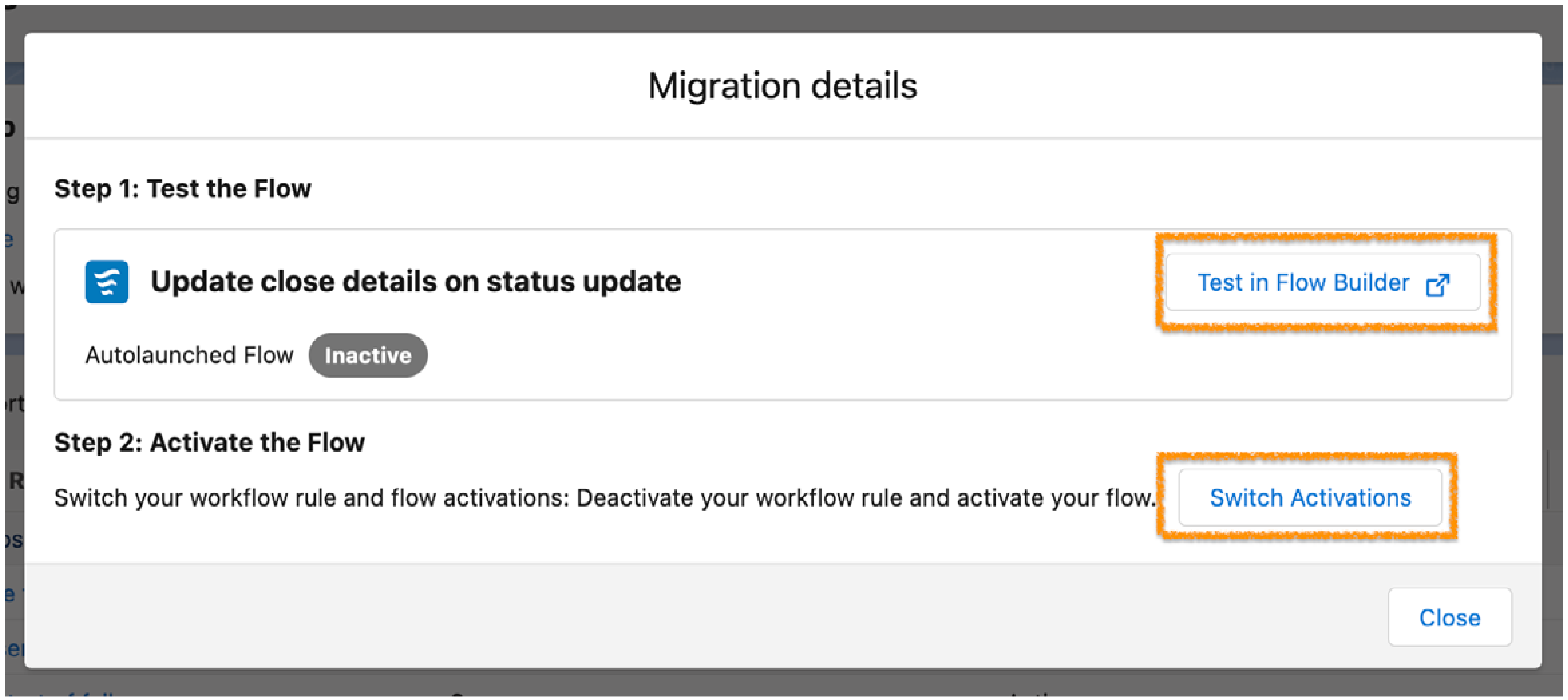
'Migrate to Flow' Tool

No doubt Salesforce Flow is getting better after each release. After all the great Flow features announced in Summer '22 and also in the past releases, it makes no sense to create new workflow rules or process builders. Moreover, Salesforce will be deprecating workflow rules and process builders soon. To help us with the migration, the 'Migrate to Flow' tool comes in handy!

In the setup area, we can look for the 'Migrate to Flow' tool as depicted in the screenshot below and select a workflow to convert, and click on the 'Migrate to Flow' button.



And boom! Your new flow is ready to be tested. You can test it using the 'Test in Flow Builder' button and later activate the flow using the 'Switch Activations' button!



Read on →

Joeri Matthijssen
Analytics Consultant

Salesforce Data Hub

At its core Tableau is a data visualization tool, created with the guiding philosophy to make data understandable to ordinary people. And with this Summer '22 release, this mission will be further accomplished. Continue reading to hear all about our most anticipated feature.

Chapter topic

> Ask Data Phrase Builder

Read on →

Back to chapters

“Tableau is considered to be the most popular visualization platform in the industry, recognized as a leader by Gartner for 10 years straight. Due to its ease of use, it can be adopted by data analysts to build and prepare and business users to analyze data, within days.”

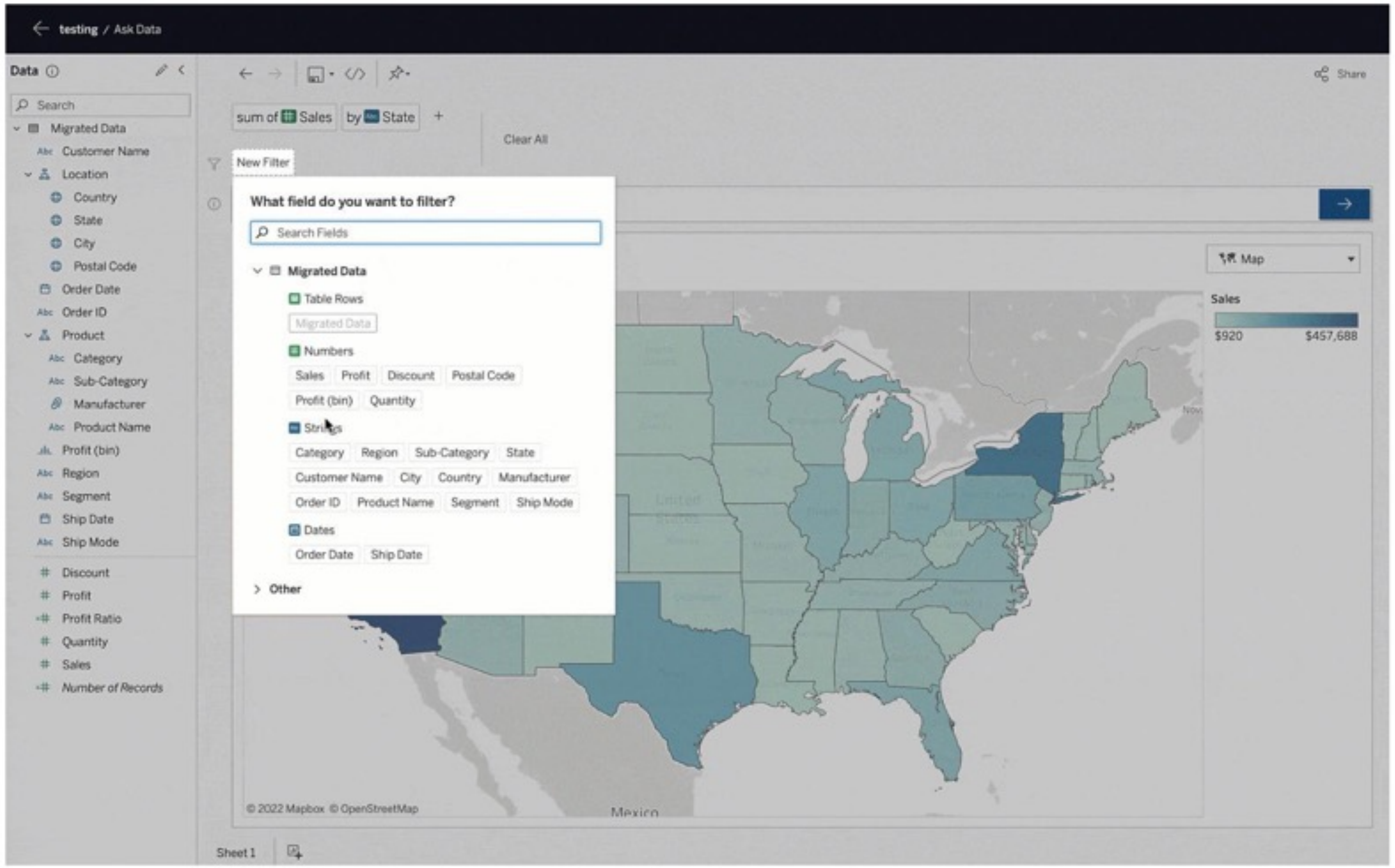
Read on →

Back to chapters

Ask Data Phrase Builder

Does typing a question feel like staring at a blank page when using Ask Data? Sometimes you might not know what to ask just yet, or you may want to familiarize yourself with the data a little more. Tableau has your back! The new Add Field and Add Filter buttons in Ask Data provide an intuitive click-through workflow to help you get the answers you need.

The guided workflow provides visual prompts and suggested actions to build your queries (as phrases) with fields and filters relevant to you. The results of your questions or phrases come as rich data visualizations that enable you to get the insights you want from your data. You can try Ask Data Phrase Builder in Tableau Server and Tableau Online.



Read on →

Back to chapters

Teun Gilissen
Data & Analytics
Consultant

Einstein Discovery

With summer in the air, this brand new Einstein discovery release includes one highly anticipated feature: the ability to handle data quality issues during Story Creation.

Chapter topic

> Handle Data Quality Issues During Story Creation

Read on →

Back to chapters

"Data quality is of utmost importance when creating a prediction model. With this feature, it becomes much more convenient to identify and address data quality issues without having to recreate your model!"

Read on →

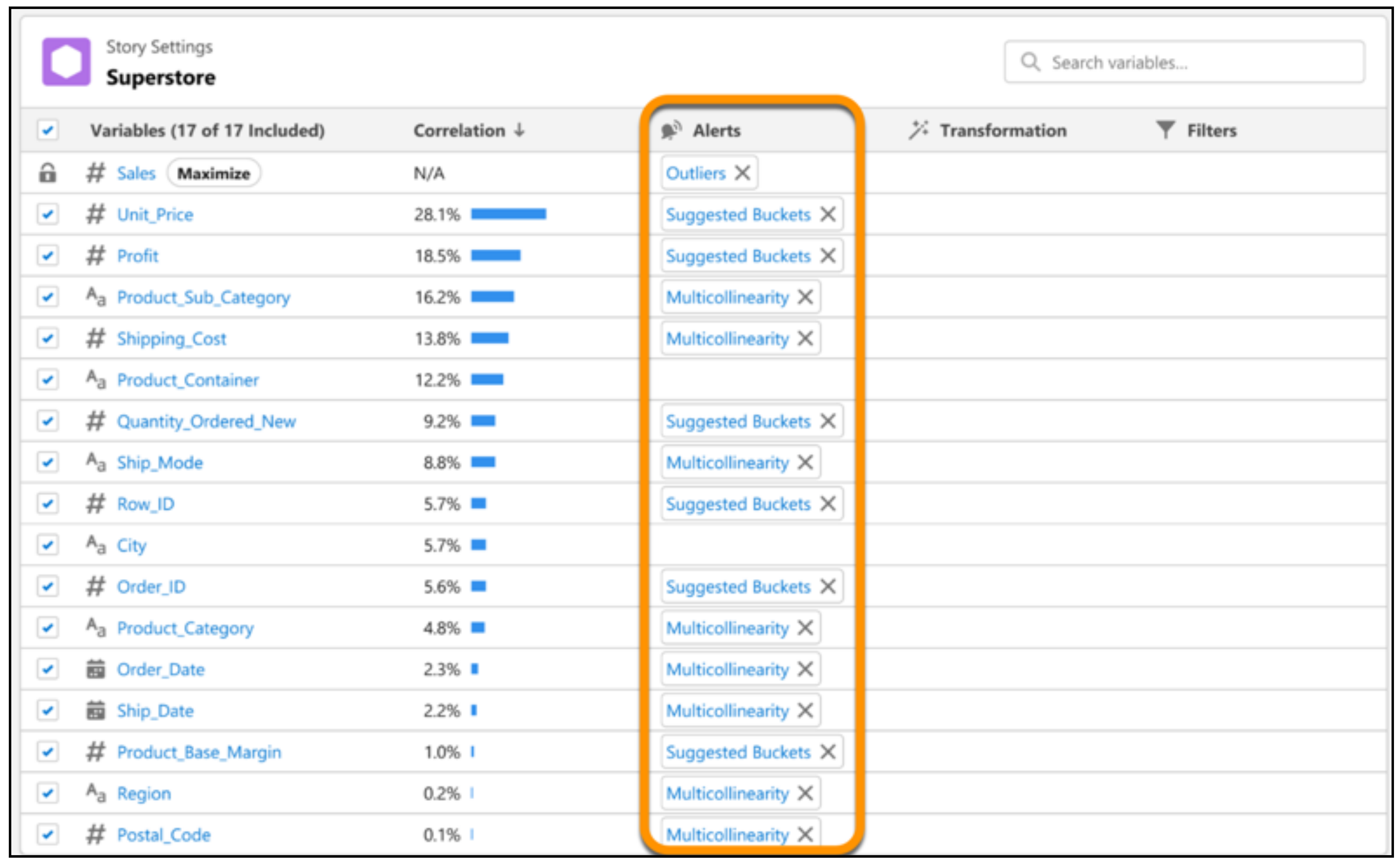
Back to chapters

Handle Data Quality Issues During Story Creation

Prediction models rely heavily on the data that you use to train them. It is no coincidence that we tend to say: garbage in = garbage out, meaning that insufficient input data will most likely lead to an insufficient model.

If you are involved with the implementation of prediction models in Einstein Discovery, you are probably familiar with Alerts. Alerts can refer to extreme outliers, multicollinearity, or other suggestions that might be addressed to improve your model. Previously, you were alerted of these potential data quality issues after you configured and created a story. To fix these issues, you made the desired changes and ran the story again.

With this new feature, Einstein Discovery automatically detects data inconsistencies in training model variables so you can immediately view and address issues as they occur. To locate these alerts, create a story and select manual settings. Data quality alerts will now show up in your story settings. Click on one of the alerts to get more information and a recommendation on how to fix the issue.



Read on →

Darren Aletoe
Data & Analytics
Consultant

Gert Jan Loonstra
Data & Analytics
Consultant

CRM Analytics (formerly Tableau CRM)

What's in a name? Having already said goodbye once to names such as Waves and Einstein Analytics, the release of a lot of new features meant it was also time to say goodbye to the name Tableau CRM. So let's introduce you to a new brand name: CRM Analytics, which also comes with a Summer update. We're happy to tell you more about our two most anticipated features.

Chapter topics

Read on →

Back to chapters

"The 'Clicks, not Code' vision of Salesforce is now leading to major updates for CRM Analytics as Recipes is getting a lot of improvements and more are on the way! This will allow for more ease of use of the Analytics Studio for everyone interested in getting more value out of their CRM Data!"

Read on

Back to chapters

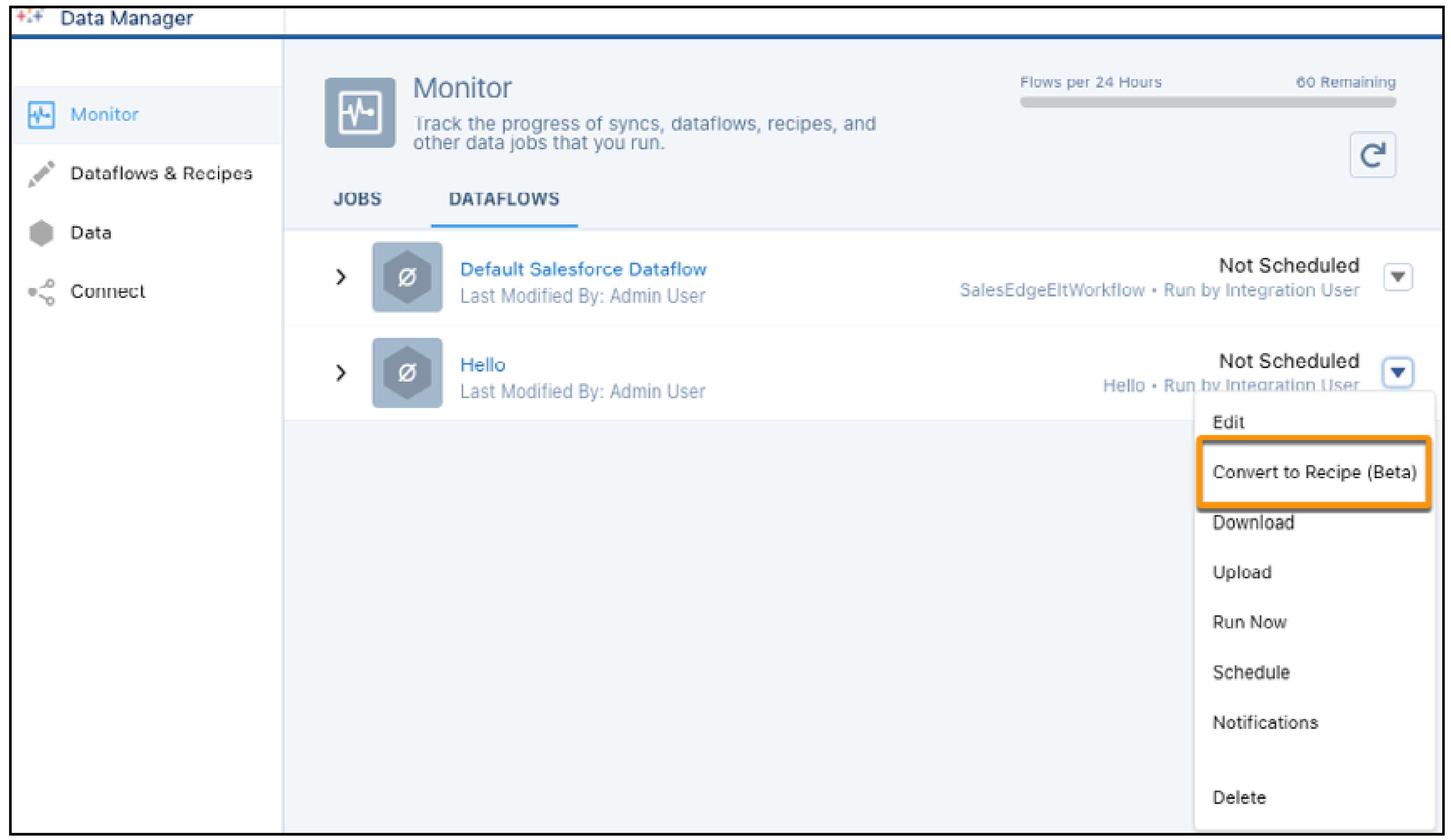
Transition Towards Recipes

The Summer 22' release for Recipes in CRM Analytics includes several enhancements. Let's start by looking at a highly anticipated feature; Data Sampling. Before this release, you could only view the sample output based on the values in the top rows of the preview table. Now, Data Sampling is expanding to allow for determining the number of rows in the preview, filtering of rows, and filtering on column values. This will aid professionals to see the impact of their transformations in Recipe directly.

Next up; relative date filters! The feature within Salesforce Reporting to filter on relative dates has been an outcome for many business users of the Salesforce platform. Now, this feature is included in Recipe to allow for even more data preparation. After all, better data leads to better outcomes!

With the new 'Map All Columns' feature, you can automate add columns to the Append Node without manually walking through each node in your Recipe. This saves everyone a lot of time!

Lastly, with the announced Beta feature 'Convert Dataflows to Recipes', Salesforce is clearly signaling that CRM Analytics is moving away from Dataflow and into Recipe. This announced feature will enable people to transfer their nodes from Dataflow to Recipe to continue their development.



Read on →

Back to chapters

Smart Filtering on Components and Widgets

In the Summer '21 release, reusable components were introduced. One year later, this feature was improved and can now be created and searched for from the Analytics home page. This creates a more smooth use and consistent experience for users. If filters are added to an existing component, these can be repeated on other components on your dashboard. Created filters can thus be saved once and reused later.

More filter features are added to Salesforce objects, live datasets, and 'Customer Data Platform' data in embedded dashboards. In Lightning Pages, widgets and components can be filtered at the same time by for instance a measure. These filters can be set up using JSON strings in the Filter String Box or by defining them in the Filter Builder. 'Convert Dataflows to Recipes', Salesforce is clearly signaling that CRM Analytics is moving away from Dataflow and into Recipe. This announced feature will enable people to transfer their nodes from Dataflow to Recipe to continue their development.

"Using smart filters in embedded dashboards narrows the data shown. This will allow users to access relevant data faster and more accurately."

Read on →

Ralph Knoops
Data & Analytics
Consultant

Snowflake

Within the Salesforce Ecosystem, Snowflake can unlock significant possibilities to get even more out of your data and eventually drive better business decisions. With the Summer '22 release, actionability from Snowflake-derived insights to Salesforce becomes even easier thanks to the introduction of Salesforce Data Pipelines. We think this is something you can benefit from, so let's take a look!

Chapter topic

> Improved Actionability with Salesforce Data Pipelines and Snowflake

Read on →

Back to chapters

"Enabling your workforce by generating actions based on insights from Snowflake can help improve operational excellence."

Read on →

Back to chapters

Improved Actionability with Salesforce Data Pipelines and Snowflake

Making the right business decisions based on your data is what Snowflake is all about. The application is not the end station, but fully enables users by making the relevant information available within the Salesforce processes.

With the use of Salesforce Recipes, it is possible to generate records via Snowflake, so actionability becomes even better. If in Snowflake for example a risk assessment is being carried out for a customer and action needs to be taken, Snowflake can send this record back to Salesforce and create a case for a customer service representative to pick this up.

Before, this was only possible via CRM Analytics (formerly Tableau CRM). But with the use of Salesforce Data Pipelines, it's now also possible to generate these records directly in Salesforce without having to use CRM Analytics.

Read on →

To read all Release Papers,
please click here

nextview...

Design · Led
Salesforce
Consulting