



Salesforce Summer '16 Release Notes

Salesforce, Summer '16

Lightning is the fastest way to connect with customers, employees, and partners



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SALESFORCE SUMMER '16 RELEASE NOTES

Salesforce delivers powerful new business intelligence capabilities, more ways to collaborate on deals and projects, and even greater control over your data.

IN THIS SECTION:

[How to Use the Release Notes](#)

The release notes offer brief, high-level descriptions of enhancements and new Salesforce features. They also include setup information, implementation tips to help you get started, and best practices to ensure your continued success.

[How and When Do Features Become Available?](#)

Some features in Summer '16 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

[Salesforce Editions Better Optimized to Meet Your Business Needs](#)

We've loaded up Professional, Enterprise, and Unlimited Edition orgs with more features. For example, Professional Edition now comes with Process Builder, Salesforce Console, Record Types, and more. Some limits have also increased, like more sandboxes for Professional, Enterprise, and Unlimited Edition orgs. Consider whether your Salesforce org still meets your company's needs. Would extra features help your business succeed? It might be time to upgrade.

[Supported Browsers](#)

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

[Lightning Experience: A Modern and Intelligent User Experience](#)

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

[Financial Services Cloud: Advisor Productivity Boosts, Internationalization, and Salesforce Shield](#)

Look out world—here comes an upgraded Financial Services Cloud. Convert leads to clients, create opportunities, and deliver service with an even more personalized touch. We've added support for multiple currencies, new locales and languages, and Salesforce Shield capabilities including Platform Encryption.

[Health Cloud: Internationalization, Salesforce Shield, and Improved Patient Lists](#)

We've been hard at work translating Health Cloud into six new languages and ensuring that protected health information (PHI) data is secure and protected. And in our spare time, we've thrown in a few usability improvements that will make customizing Health Cloud and managing your patients even easier.

[Sales: Contacts, Notes, Microsoft® Integration, and More](#)

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activity that needs their attention. And help your sales teams increase their sales productivity in Lightning Experience.

[Analytics](#)

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

[Service: Enhanced Field Service, Quick Setup with Templates](#)

Empower your field-service agents with Knowledge articles and milestones on work orders. Set up Service Cloud features in a few clicks with Launch Pad templates. And enable Social Customer Service faster and leverage its extended breadth.

[Mobile: Do More On the Go](#)

Give your field sales teams a boost with more intelligence built into Salesforce1. Reps and managers can drive business through meaningful insights, from top news stories about customers and competition to lively, interactive charts for tracking critical details. Is delivering first class support to customers on the go your mission? Help your agents see exactly what's going on and resolve cases faster than ever with two-way video and live camera feeds from the SOS SDK for iOS and Android.

[Communities: Pre-Moderation, Profile-Based Page Visibility, Global Search, and More](#)

Greater control, more flexibility, and enhanced customizations—that's what you see throughout Communities in Summer '16. With pre-moderation, community managers can approve posts before they're published and freeze members who post inappropriate content. Profile-driven page visibility in Community Builder lets admins target community pages to members with specific profiles. And global search makes it easy for community members to search all the records available to them through the community. The list goes on...

[Chatter: Improved Look and Feel, Group Activity Info, Larger Group and Profile Photos](#)

Enjoy Chatter's improved look and feel in Lightning Experience, access group activity information in a handy tab, and upload bigger, high-resolution photos to your groups and profile. There are several other improvements to feeds, groups, and more.

[Files: Assign Topics to Files, Browse External Files in Lightning Experience, Connect to Box](#)

Add topics to files, set file access by record, check out external files in Lightning Experience, and much more.

[Search: Find What You're Looking For Faster](#)

The search experience continues to evolve with users' needs. In Lightning Experience, a more consistent search scope bar order aids navigation on the search results page. We're delivering improved person account and inactive user search results. And spell correction expands to more objects.

[Data.com: Prospect for Accounts in Lightning Experience, Critical Insights on Opportunities, and More](#)

More key Data.com features are available in Lightning Experience. Data.com Prospector users can check out critical information on companies associated with their opportunities. They can prospect for new companies right from the Accounts page, and access company and industry insights from an account or opportunity. Data.com Premium Clean customers automatically enrich leads with critical company information such as revenue, employee count, and industry. Data.com is available in Salesforce Classic and Lightning Experience.

[Customization: Lightning Pages Galore and Visualizations for Your Org's Activities](#)

What new point-and-click powers have we unleashed this time? Let us count the ways! Lightning page admins can edit not only record pages but the Home page, too. Get stunning Wave visualizations of your org's activities, like who's logging in from where. And if automation is your game, your processes don't have to stop after an action group is executed—they can keep going like the little process that could.

[Security and Identity: More Security Measures, More Encryption Coverage, Easier Switching Between Orgs](#)

We've improved two-factor authentication management, provided more security measures around identity verification, and now require the HTTPS protocol to log in. Encryption now supports Lightning Experience, protects more fields, and secures data in even more apps. Also, your users can easily switch between orgs with the user switcher.

[Deployment: More Included Sandboxes](#)

You now have new ways to deploy changes to your org. Enhancements include lots more sandboxes for some editions.

[Development: Create Your Own Salesforce App](#)

Whether you're using Visualforce, Apex, Lightning components, or our APIs with your favorite programming language, these enhancements to Force.com help you develop amazing applications and integrations.

[Marketing](#)

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer-leveraging data from any source, and plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time, and measure the impact of each interaction on your business so you can optimize your approach in real time and deliver better results.

[Salesforce Overall: Automatic Geocodes and Streamlined Spell-Check](#)

Spring '16 improves your overall Salesforce experience by offering automatic geocodes for your records' addresses and streamlining your spell-check experience.

[Critical Updates: New Security Architecture Introduced for Lightning Components](#)

This release includes a critical update that affects users who access Lightning Experience or Salesforce1 from IE11. Additionally, if you use Lightning components, Visualforce, flows, or approvals, it includes critical updates that probably affect your customizations.

[Help and Training](#)

We added Trailhead modules and walkthroughs and instructional videos.

[Other Salesforce Products](#)

How to Use the Release Notes

The release notes offer brief, high-level descriptions of enhancements and new Salesforce features. They also include setup information, implementation tips to help you get started, and best practices to ensure your continued success.

- You can choose from [PDF](#) and [HTML](#) versions.
- By default, your browser's language settings determine the language used in the HTML release notes. To change the language, scroll to the bottom of the page, click **Change Language**, and select a language.
- These release notes are about new and modified features, not known issues. For information about known issues, check out the [Salesforce Known Issues site](#).

 **Note:** Until the new Salesforce release is available in your production org, links from release notes to the Salesforce Help, implementation guides, developer guides, and other documentation don't work or point to materials for the previous Salesforce release. Some of our documentation has preview versions available several weeks before the Salesforce release. To access the preview versions on [Salesforce Developers](#), select Preview from the Documentation Version drop-down list.

IN THIS SECTION:

[HTML Release Note Filters](#)

Zero in on the news that matters most by using filters. The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

[Easily Understand What's in Salesforce Lightning Experience and What's in Salesforce Classic](#)

Everybody's excited about Salesforce Lightning Experience and everything it offers. But we also understand that lots of organizations will continue to use Salesforce Classic—either exclusively for a few releases or in tandem with Lightning as that experience evolves.

[You Asked for It!](#)

We delivered the features you asked for on IdeaExchange.

[Other Resources](#)

In addition to these release notes, we provide other resources to get you up to speed quickly.

[Release Notes Changes](#)

Read about changes to the release notes, with the most recent changes first.

[Your Feedback Matters](#)

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

HTML Release Note Filters

Zero in on the news that matters most by using filters. The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Edition

Which feature enhancements are available to you depends on your edition. Narrow down the list of release notes so it shows only enhancements that are available in your edition.

Feature Impact

Every release includes some features that you turn on or configure before users can start getting the benefits. As an administrator, filter the release notes to focus on, or hide, just those features. Or maybe you want to see only the features that are enabled for your users automatically.

Product Area

See only the products that your org uses. If your org does sales but not support, set up your release notes so that only the sales-related news appears.

To narrow down the list of release notes, click **Show Filters** on the right side of the screen.

The screenshot shows a filter panel with the following content:

- Edition:** Professional Edition (dropdown menu)
- Feature Impact:** Enabled for users (dropdown menu)
- Product Area:**
 - Analytics
 - API
 - Chatter
 - Email Integration
 - Communities
 - Data.com
 - Force.com Customization
 - Force.com Development
 - Mobile
 - Sales
 - Service
 - Work.com
- At the bottom: [Fewer Product Areas](#) and [Reset](#)

After you select filters, you can share your list of release notes with anyone. Copy the URL after you select filters, and then distribute that URL however you want.

Easily Understand What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Salesforce Lightning Experience and everything it offers. But we also understand that lots of organizations will continue to use Salesforce Classic—either exclusively for a few releases or in tandem with Lightning as that experience evolves.

One key to success during this time of transition is understanding what's available in one, both, or all the Salesforce experiences. To guide you, we've added experience information to these release notes at the highest level where that information applies: for entire clouds or for individual features within clouds. Let's look at three examples.

- Communities and *all* its features are currently available in Salesforce Classic *only*, so we tell you that in the Communities "Editions" table. It says "Available in: Salesforce Classic."

- Case Feed, a Service Cloud feature, is available in *both desktop experiences*—Lightning and Classic—so its description says “This feature is available in both Lightning Experience and Salesforce Classic.”
- Opportunity Workspace, a new Sales Cloud feature, is available in Lightning Experience *only*, so its description says “This feature is available in Lightning Experience only.”

If a *key* feature is also available in Salesforce1, our mobile app, we mention that in the feature description. But you can also check the Mobile section for a complete list of what's new in Salesforce1.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered
Lightning Experience	
Add a Visualforce Page/Component inline on “Edit” page (<i>partially delivered</i>)	Create and Edit Lightning Experience Record Pages (Generally Available)
Switch Tab Position for Feed-based Page Layouts	
Add text box for instructions / reminders to the page layout	
Sales	
Allow customization of the Lightning home page	Home: Customize Home for Different User Profiles (Generally Available)
Assign Default Dashboard on Home Page Layout (<i>partially delivered</i>)	
Link a Single Contact to Multiple Accounts	Contacts: Associate a Contact with Multiple Accounts (Generally Available)
Analytics	
Export Reports from Lightning Experience	Export Reports as Files from Lightning Experience
Show What Dashboard Component Is Utilizing a Report	Use SOQL to Identify Reports Used by Dashboard Components
Why Can't I Export What I'm Seeing on Each Screen?	Download the Data from Explorations as .Csv or Excel Files
Ability to Export Data from Dataset in CSV Format	
Mobile	
Change Record Owner in Salesforce1	Salesforce1: Change a Record's Owner
Add Team Member in Salesforce1	Salesforce1: Team Up on Accounts
Communities	
Search in Communities Templates Should Return Results From All Topics	Give Community Members What They're Looking for with Improved Search
Allow Community Contacts to Search for Other Community Contacts	Give Community Members What They're Looking for with Improved Search
Data.com	

IdeaExchange**Idea delivered**

Using Data.com to cross-check company info in an existing Lead	Automatically Enrich Leads with Critical Company Information (Generally Available)
Auto Populate City/State based on Zip	Automatically Get Geocodes for Addresses (Generally Available)
Spring 15 Maps Feature should populate lat and lon on the address fields.	

Customization

Process Builder: Allow Choice to Let Criteria Execute Sequentially	Processes Can Execute Actions on More Than One Criteria
Process Builder to Handle Multiple Decisions Evaluating to True in One Process	
Process Builder: Next Decision Box for True	

Security and Identity

Platform encryption for managed package fields	Encrypt Custom Fields in Managed Packages
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Deployment**Development**

Support of CORS (Cross-Origin Resource Sharing) in Salesforce REST	Use CORS to Access Apex REST Classes Use CORS to Access Bulk API
Provide Reliable or Guaranteed Message Delivery for Streaming API	Replay Events with Durable PushTopic Streaming (Generally Available)

Other Resources

In addition to these release notes, we provide other resources to get you up to speed quickly.

- [Release Readiness & Feature Adoption community](#). Join a community of Salesforce experts.
- [Release demos](#). Get quick video overviews of what's coming this release.
- [Release Overview](#). Create internal training for your users, review setup screens, and learn how to use features.
- [Release Readiness & Feature Focus Event Calendar](#). Register for expert hours and other events.
- [Release Readiness Live](#). Register to make the most of the new features.

Release Notes Changes

Read about changes to the release notes, with the most recent changes first.

August 31, 2016

Save Time by Cloning Sandboxes (Pilot)

Removed the release note for this feature, which won't be available in the Summer '16 timeframe.

August 17, 2016

Review Debug Logs Without Sifting Through Extra Log Lines

Added a release note for a bug fix which eliminates extra `USER_INFO` log lines in debug logs.

Salesforce1: See the Forest and the Trees on Task Lists in the Downloadable Apps (Tablets Only)

Revised topic to clarify changes.

Salesforce1: List Item Actions Replace the Action Bar on Task Lists (Tablet Only)

Revised topic to clarify changes.

August 10, 2016

Save the Day by Generating a Temporary Verification Code for Users in Distress

Clarifying that temporary identity verification codes can be used for two-factor authentication only, not for device activations.

Salesforce1: Downloadable Apps Don't Share Authentication With In-App Browsers

Clarifying that the Salesforce1 downloadable apps don't share authentication information with in-app browsers when users access external URLs.

Salesforce1: See the Forest and the Trees on Task Lists in the Downloadable Apps (Tablets Only)

Introducing a new tasks landing page, when on a tablet, in Salesforce1.

Salesforce1: List Item Actions Replace the Action Bar on Task Lists (Tablet Only)

Describing new functionality for using quick actions on the tasks landing page, when on a tablet, in Salesforce1.

August 3, 2016

Get Even More from Your Sales Data with the Brand New Sales Wave App

Announcing completely refreshed version of Sales Wave Analytics app.

Reset and Upgrade Features Help You Keep Wave Apps up to Date

Adding upgrade to Wave Analytics prebuilt apps.

Import My Accounts and Contacts Wizard to Retire in Winter '17

Announcing the retirement of the Import My Accounts and Contacts wizard.

Active Field Added to Timeline View Configurations Tab

Announcing that a new field has been added to the Timeline Configurations tab in Health Cloud.

Customize File Downloads (Pilot)

Added a release note for this pilot feature.

Removed Release Note: Person Account Search Enhancements

Feature scheduled for release in Winter '17.

License Management App Now Displays Installations with Long Version Numbers

Added notification about a fix to how LMA displays installations with long version numbers.

Setup Assistant is Retiring in August 2016 for Customers Using Salesforce Classic

Announced retirement and provided alternative resources for customers.

July 27, 2016

Salesforce1: Legacy Charts to Begin Phased Retirement in Winter '17, Full Retirement in Spring '17

Announcing the retirement of Legacy Charts in Salesforce1.

Salesforce1: Get Enhanced Security for Salesforce1 for iOS with Mobile Device Management (MDM)

Added information about a new Mobile Device Management (MDM) setting to prevent users from adding their own login hosts for Salesforce1 for iOS, version 10.0.2.

Salesforce1: Test Current Network Conditions

If users of the Salesforce1 downloadable app for iOS experience sluggish network performance, they can now test network conditions from within the app. This option is available with version 10.0.2.

More Social Accounts

Added information about ability to sync up to 2000 social accounts.

LockerService Auto-Activation Date Changed to Spring '17

The auto-activation date for LockerService has changed from Winter '17 to Spring '17, which gives you more time to verify that your components are compliant with LockerService.

LockerService for Communities Auto-Activation Date Changed to Spring '17

The auto-activation date for LockerService for Communities has changed from Winter '17 to Spring '17.

Change to Record Ownership Flow During Lead Conversion

Added information about a change in behavior when a user converts a lead into a new account, contact, or opportunity and assigns that new record to a separate user.

Care Plan and Timeline Get More Elbow Room

Announcing that the Care Plan and Timeline have been put on separate tabs in the Health Cloud Console.

July 20, 2016

Salesforce1: View Custom Formula Field Images and Links in Salesforce1 Reports

Announcing that custom formula fields in Salesforce1 reports now behave just like they do on the full Salesforce site. Previously, in Salesforce1, custom formula fields displayed HTML tags instead of images or links.

Localize Labels on the Patient Card and Health Timeline

Added the ability to localize the labels on the Patient Card and the Health Timeline.

Medical Record Number No Longer Required in Patient Creation Process

Added changes to the patient creation process in Health Cloud.

Search Lightning Experience Setup with Global Search

Added release note topic.

Spell Correction Expanded to More Objects

Added Contact to list of objects that support spell correction.

July 13, 2016

DML Isn't Supported in Transaction Security Policies

Noted that DML operations aren't supported for Transaction Security policies.

Enhance Security with LockerService (Critical Update)

Revised details of the tightening of CSP enforcement, which is postponed until a future release.

July 6, 2016

Transaction Security Data Export Clarification

Clarified the available object and report types for the Data Export event type.

Implement Advanced Authentication for iOS Users of Custom Domains

If you have a custom domain created with My Domain, you have a new option to support authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of applications on iOS devices.

“PageReference getContent() and getContentAsPDF() Methods Behave as Callouts” Critical Update Postponed

Added notification that auto-activation of this critical update has been postponed until Winter '17.

New Improvements to Field Service Lightning

Described the June 2016 updates to the Field Service Lightning managed packages.

Improve Your Dashboards with New XMD Elements

Added notification of changes to Wave XMD, including new elements.

Review Change to XMD REST API

Added notification of withdrawal of PUT verb for XMD REST API endpoint.

June 29, 2016

Get More Insight Into Whether You're Ready for Lightning Experience

Added limitation details for customers who have set Salesforce IP restrictions.

Salesforce1: Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps (Beta)

Clarified that Offline Edit allows users to create records for cached objects and edit or delete cached records only. Creating, editing, or deleting records that aren't included in the cache before going offline isn't supported.

Data and UI Elements That Are Available When Salesforce1 Is Offline

Clarified that recently accessed files aren't part of the default set of recently accessed records that Salesforce1 caches, even if Files is one of the first five objects listed in the Recent section of the Salesforce1 navigation menu. However, files that a user accesses from Salesforce1 before going offline are automatically added to the user's cache and can be viewed while offline.

Salesforce1 Offline Edit Limitations

Added some additional details. The **New** action on related lists isn't available while offline. Creating records is available using the **New** button on recently accessed object home pages only.

Sales Path is supported for offline use.

“Modify All Data” Permission Required for Using Inbound Change Sets and Editing Deployment Connections

Users must now have the “Modify All Data” permission in addition to the “Deploy Change Sets” permission to deploy or validate change sets and to edit deployment connections.

Let Agents Know When the System Updates Cases

Added some additional details. When users select `System`, they must specify an email address to use for notifications.

Data Quality: View a Data.com Data Assessment in Lightning Experience

Clarified that the Data Assessment is for orgs in the United States and Canada only.

Other Changes for Lightning for Outlook

Clarified that customers using the TLS 1.0 Critical Update Console (CRUC) setting to test their readiness for TLS 1.0 disablement won't get an accurate reading of their Lightning for Outlook preparedness.

Verify Your Security Protocol to Avoid Lightning Sync Service Interruptions

Clarified that customers using the TLS 1.0 Critical Update Console (CRUC) setting to test their readiness for TLS 1.0 disablement won't get an accurate reading of their Lightning Sync preparedness.

Log In Even Faster with the Salesforce Authenticator App

Salesforce Authenticator app improvements allow users to log in even faster. Apple Watches now connect to the app faster, and users can now approve tasks directly from notifications on mobile phones.

Manage Pending Posts, Flagged Items, and Frozen Members with Preconfigured Insights

Additional preconfigured insights are available. In addition to managing pending posts and frozen members, you can also view all flagged items and view all of your moderation activity.

June 22, 2016

Get More Insight Into Whether You're Ready for Lightning Experience

Run the Readiness Check to evaluate some of your Sales Cloud features and customizations. That way, you can learn which are ready for Lightning Experience and which need your attention before you migrate your users.

What's New in the Latest Salesforce1 Downloadable Apps

Announcing the general availability of the Salesforce1 downloadable app for Android, version 10.0. The new app will gradually roll out to customers over the next few weeks. When it's available for your org, your Android users can download the new version from Google Play.

Data and UI Elements That Are Available When Salesforce1 Is Offline and Salesforce1 Offline Edit Limitations

Clarified details about the data that's available when Salesforce1 is offline. Also clarified some of the limitations for the beta version of the Offline Edit feature.

Introducing Service Cloud Lightning Snap-Ins for iOS (Beta)

This new Service Cloud SDK lets you access powerful Service Cloud features right from your iPhone or iPad.

LockerService Enforcement for Lightning Components Installed from Managed Packages

Clarified when LockerService is enforced for components installed from managed packages.

Tailor Email to Support Your Business's Needs

After enabling Enhanced Email, emails are stored as Email Message records, which gives users a ton of new functionality.

Enhanced Email Enabled by Default

After enabling Enhanced Email, emails are stored as Email Message records instead of Task records. For backwards compatibility, a Task record is still created.

June 15, 2016

Supercharge Service Cloud Analytics With Service Wave, Now Generally Available on page 160

New app provides prebuilt Wave Analytics dashboards for service managers and agents based on Service Cloud data.

What's New in the Latest Salesforce1 Downloadable Apps

Version 10.0 of the Salesforce1 for iOS downloadable app is coming to the App Store the week of June 13. Learn all about the new enhancements for your iOS users—including the beta release of Offline Edit.

The Salesforce1 for Android downloadable app, version 10.0 will be available a little later this summer.

Encrypt Custom Fields in Managed Packages

Added note: Talk to Salesforce support to enable this feature.

LockerService Not Enforced for Lightning Components Installed from Managed Packages

There is an exception for this release for enforcement of LockerService for components installed from managed packages.

LockerService Can Be Disabled for New Developer Edition Orgs

You can disable LockerService in a Developer Edition org created after the Summer '16 release.

Walkthroughs

Check out the new permission set licenses walkthrough!

Other Changes for Lightning for Outlook

Currently, Lightning for Outlook is not compatible with the TLS 1.0 Critical Update Console (CRUC) setting.

Verify Your Security Protocol to Avoid Lightning Sync Service Interruptions

Lightning Sync extends TLS 1.0 support to align with the company-wide [TLS 1.0 disablement schedule](#). However, currently, the feature is not compatible with the TLS 1.0 Critical Update Console (CRUC) setting.

June 7, 2016**Other Changes for Lightning for Outlook**

Lightning for Outlook doesn't support TLS 1.0 in Summer '16.

Verify Your Security Protocol to Avoid Lightning Sync Service Interruptions

Lightning Sync doesn't support TLS 1.0 in Summer '16.

Lightning Voice: Make and Receive Phone Calls Right from Salesforce (Generally Available)

Added topics about Lightning Voice.

Create a Calendar from Anything in Salesforce

Corrected the Salesforce editions that can access the feature.

See Who Liked Your Post in Lightning Experience

Clarified that the Lightning Experience People Who Like This Post card, which lists who likes a post, is available only on posts and not on comments.

New Requirements for Allowing Guest Community Users to Log a Case

Removed note to contact Salesforce to enable Guest Access to the Support API and add NewCase to the quick actions.

Event Monitoring Wave App (GA)

Updated references to the Admin Analytics app to use its new name: Event Monitoring Wave App.

Added additional information about the Event Monitoring Wave App's usage scope.

June 1, 2016**Help and Training**

Check out our new Trailhead modules and videos.

Added trust and compliance documentation.

Other Resources

Added Release Readiness Live registration form.

Override a View Action with Both a Visualforce Page and a Lightning Page

Added a note about the Edit Page Setup menu option in Lightning Experience on object detail pages overridden by Visualforce pages.

Visualforce Quick Actions Now Render Properly in Salesforce1 and Lightning Experience

Added information about a fix to how Visualforce page quick actions render.

Other Changes in Customization

If you don't use the Enhanced Profile User Interface, the field labels in profile view that indicate whether a field is editable have been updated. New field labels are `Read Access` and `Edit Access`. These new labels replace `Visible` and `Read-Only`.

New Resources: Dashboard Describe and Report Query

Added information about a new Reports and Dashboards REST API resource, `query`.

Turn AppExchange Checkout Data into Insights and Actions

Updated note to reflect support for Japanese in the Checkout Management App.

Create Trial Orgs with New Edition Templates and Changed Objects

Added information about changes to the SignupRequest object's `Edition` field and to the available Edition values on the Environment Hub's Create Org page.

Log In to Branded Login Test Sites with a New URL

Noted that the login URL for Trialforce branded login test orgs has changed.

More URLs Get Rich Media Previews

Boosted the number of supported rich link preview domains to 400+ and added a link to a look-up list of supported domains.

Data Quality: View a Data.com Data Assessment in Lightning Experience

Added a note that Salesforce notifications aren't sent for a Data Assessment of orgs with fewer than 100 accounts.

New Objects

Added the FlowInterviewOwnerSharingRule and FlowInterviewShare objects.

May 25, 2016

New Chart Types Expand Wave Visualization Capabilities

Added information on the open pilot for custom thematic maps (choropleth).

Changed Apex Classes

Changed values in the `TxnSecurity.Event` class data property.

Discover Related Questions (Beta) and Articles

Clarified that related questions are available within 24 hours after the release.

What's Not Available in Summer '16 Lightning Experience Features

Updated where you can find the full list of what's not available in Lightning Experience.

Perfectly Position and Fit Widgets in the Original Dashboard Designer

Added that you have finer control when positioning widgets and can fit the box widget into a smaller area.

Other Resources

Added Release Overview and Release Readiness & Feature Focus Event Calendar.

Tooling API New and Changed Objects

Added information about changes to the `JunctionIdListName` field, which is in the objects RelationshipDomain and RelationshipInfo.

May 19, 2016

One Asynchronous Limit to Rule Them All

Removed the release note announcing this feature. Limits for asynchronous Apex calls remain the same as in the previous release.

Save Time by Cloning Sandboxes (Pilot)

Announced that Sandbox-to-Sandbox Cloning is being released as a pilot rather than being generally available. We want to make sure that the feature meets all our quality standards before we roll it out to everyone.

Shortcuts for Currency and Number Fields in Lightning Experience

Corrected the release note to indicate that the shortcut for trillions is only available in Lightning Experience and the Salesforce1 mobile app.

May 18, 2016

For Whom the Data Loads

Announced enhancements to the Data Loader for Windows installer to clarify a previously confusing step.

Save Time by Cloning Sandboxes (Pilot)

Clarified that you can clone sandboxes only if they are on instances that have been upgraded to Summer '16.

Improve Article Suggestions on Cases

Clarified that the Description field is always taken into account when suggesting articles for cases and does not count toward the character limit.

Data.com Clean

Added Lightning Experience limitations for Data.com Prospector.

Removed section in limitations for Social Key. Social Key is not available in Salesforce Classic or Lightning Experience.

May 11, 2016

Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 (Critical Update)

Added note about continued IE11 support for Communities.

Enhance Security with LockerService for Communities (Critical Update)

Added note about continued IE11 support for Communities.

Leverage Lightning Design Tokens to Brand Custom Components

Added information about Lightning design tokens for custom components in Communities.

New Change Set Components

Added new Wave change sets.

SOSL

Removed reference to snippets being available for case, case comments, feed, feed comments, idea, and idea comments.

Changed Resource: Parameterized Search

Removed reference to snippets being available for case, case comments, feed, feed comments, idea, and idea comments.

Standard Users Have Access to Their Login History

Added information about changes to reports now that users have access to their login history.

May 4, 2016

Metadata API: New and Changed Types

Added new Wave metadata types.

You Asked for It!

Added Ideas that we delivered.

Added a pilot disclaimer.

Achieve Greatness in the Field with Field Service Lightning (Generally Available)

Added a link to *Getting Started with Field Service*, which includes the Field Service Lightning release notes and a link to the admin guide.

New Requirements for Allowing Guest Community Users to Log a Case

Added a release note for the new requirement to enable guest users to log cases in communities.

Control Scroll-Based Zooming in Visualforce Maps

New release note: We added a new attribute to the `<apex:map>` Visualforce tag.

Disable Custom DocTypes in Visualforce Markup (Critical Update)

Clarified the description for this critical update. This update doesn't apply to the documented and supported method of changing the page's declared docType using the `docType` attribute of the `<apex:page>` tag.

Enhance Security with LockerService (Critical Update)

Added information about restrictions to the page head markup.

New `<auraStorage: init>` Lightning Component

Use this component to initialize storage in your app's template for caching server-side action response values.

Control Who Sees What with Profile-Based Page Visibility

Clarified that this feature applies only to communities using the Napili template.

Keep Feed Tracking Updates for Less Time

Removed incorrect statement about feed tracking updates counting against customer storage.

Other Resources

Added link to release demos.

One Asynchronous Limit to Rule Them All

Removed the text indicating that the following methods on the `System.Limits` class had been deprecated: `getFutureCalls()`, `getLimitFutureCalls()`, `getQueueableJobs()`, and `getLimitQueueableJobs()`. These methods are no longer deprecated.

Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

- **Feedback forms:** As you're working with our documentation—whether it's in the Salesforce Help, release notes, or developer guides at Salesforce Developers—look for the feedback form and vote up or down. Add comments if you have them.
- **Twitter:** When you follow [@salesforcedocs](#) on Twitter, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Tweet us at [@salesforcedocs](#).

How and When Do Features Become Available?

Some features in Summer '16 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so they are prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers for Lightning Experience				
Supported Browsers for Salesforce Classic				

Lightning Experience: A Modern and Intelligent User Experience

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Experience Features in This Release			✓	
What's Not Available in Summer '16 Lightning Experience Features			✓	
Lightning Experience Bids Farewell to Internet Explorer 11	✓			

Financial Services Cloud: Advisor Productivity Boosts, Internationalization, and Salesforce Shield

Look out world—here comes an upgraded Financial Services Cloud. Convert leads to clients, create opportunities, and deliver service with an even more personalized touch. We've added support for multiple currencies, new locales and languages, and Salesforce Shield capabilities including Platform Encryption.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Convert Leads to Clients			✓	
Increase Wallet Share with Advisor Opportunities			✓	
Keep Track of More from the Home Page	✓			
Easier Tracking of Clients' Relationships			✓	
More Ownership Options for Financial Accounts	✓			
Multiple Currencies and Locales Supported			✓	
Localization in Five Languages			✓	
Secure Confidential Client Information with Salesforce Shield			✓	
Removed Dependency on Chatter			✓	
Changed API Objects		✓		
Limits for Industries REST API		✓		

Health Cloud: Internationalization, Salesforce Shield, and Improved Patient Lists

We've been hard at work translating Health Cloud into six new languages and ensuring that protected health information (PHI) data is secure and protected. And in our spare time, we've thrown in a few usability improvements that will make customizing Health Cloud and managing your patients even easier.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Secure Protected Health Information with Salesforce Shield			✓	
Multiple Languages Supported	✓			
It's Easier to Create Lists of Patients	✓			
Customize the Delivered Care Team Roles	✓			
Changes to Objects and Fields	✓			
Localize Labels on the Patient Card and Health Timeline	✓			
Medical Record Number No Longer Required in Patient Creation Process	✓			
Limits for Industries REST API	✓			
Care Plan and Timeline Get More Elbow Room	✓			
Active Field Added to Timeline View Configurations Tab			✓	

Sales: Contacts, Notes, Microsoft® Integration, and More

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activity that needs their attention. And help your sales teams increase their sales productivity in Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Core Sales Features: Help Reps Sell Using Lightning Experience				
Contacts: Associate a Contact with Multiple Accounts (Generally Available) (available within 24 hours after the release)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Opportunities: Track and Manage Your Deals				
Team Up to Sell More with Opportunity Teams in Lightning Experience			✓	
Add Default Opportunity Teams in Lightning Experience			✓	
See Up-to-Date News on Opportunities with Insights			✓	
Accounts: Store Information About the People and Business You Work With				
Team Up to Work Accounts in Lightning Experience			✓	
Create New Accounts Lightning Fast with Account Autofill			✓	
Visualize Your Business Like Never Before with Account Logos (Beta)			✓	
Find All News with One Click with the News App			✓	
Opportunity Products: Find Products with Ease in Lightning Experience (not immediately available)	✓			
Productivity Features: Help Sales Reps Do More with Lightning Experience				
Home: Customize Home for Different User Profiles (Generally Available)				
Create and Edit Lightning Experience Home Pages			✓	
Set a New Default Home Page			✓	
Assign Custom Home Pages to Specific Profiles			✓	
Lightning Voice: Make and Receive Phone Calls Right from Salesforce (Generally Available)				
Set Up Voice Features			✓	
Email: Send Email through Gmail™ or Office 365™, Enhanced Email				
Let Your Users Send Email Through Gmail or Office 365			✓	
Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Notes: Share Notes with Users and Groups and Add Meaning with Rich Text				
Share Notes with Other Users or Groups			✓	
Reps Can Add Meaning to Notes with Rich Text			✓	
Activities: Keep Up with the Speed of Business in Lightning Experience				
Create a Calendar from Anything in Salesforce	✓			
My Opportunities Calendar (Beta) Retired—Now You Can Create Your Own Calendars	✓			
Your Calendar Shows Your Selected Time Zone	✓			
Email Looks Like Email in the Activity Timeline	✓			
Use the Activity Timeline to Work Your To-Do List Faster	✓			
In the Task List, Edit Tasks Inline	✓			
List Views: Target Relevant Data with List View Enhancements for Lightning Experience				
Filter List Views with a Fine-Toothed Comb in Lightning Experience	✓			
Create Filters Effortlessly in Lightning Experience	✓			
Navigate List Views with Ease in Lightning Experience	✓			
Microsoft® Integration: Sync and Work Between Microsoft Systems and Salesforce				
Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud				
Our New Name Reflects the Growth of Our Email Integration Lineup	✓			
New Design Maximizes Space in Outlook 2016	✓			
Relate Outlook Calendar Events to Salesforce Records			✓	
Search for Salesforce Records in Microsoft Outlook	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamlined Login Process	✓			
Find Lightning for Outlook More Easily in Outlook 2016	✓			
Lightning for Outlook Available in Group and Professional Editions			✓	
Other Changes for Lightning for Outlook			✓	
Exchange Sync: Sync Microsoft® Contacts and Events Without Software				
Sync Your Contacts and Events with Lightning Sync (Generally Available)			✓	
Sales Reps Can Delete Syncing Events in One Action			✓	
Let Sales Reps Select Which Exchange Events Sync to Salesforce			✓	
Get More Information About Your System Status at a Glance		✓		
Verify Your Security Protocol to Avoid Service Interruptions			✓	
Connect for Office: Change of Availability in March 2017	✓			
Standard Mail Merge: Change of Availability in March 2017	✓			
Data Quality: View a Data.com Data Assessment in Lightning Experience			✓	
Other Changes in the Sales Cloud				
Account Insights No Longer Gets News from Yahoo	✓			
Person Accounts Has a Separate Page in the Lightning App Builder	✓			
Activity Timeline Display No Longer Controlled by Related Lists	✓			
Customize Your Related List Sorting Preferences in Lightning Experience	✓			
Preview All Your Related Lists in Lightning Experience			✓	
Spell Checker Removed from Activities	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Verify Your Security Protocol to Avoid Service Interruptions While Using Salesforce for Outlook	✓			
Highlights Panel Shows off More Fields	✓			
Change to Record Ownership Flow During Lead Conversion	✓			
Import My Accounts and Contacts Wizard to Retire in Winter '17	✓			

Analytics

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards in Lightning Experience: More Charts, Feeds, Export Reports				
Dress up Your Data with New Charts in Lightning Experience	✓			
Collaborate with Others on Report and Dashboard Feeds in Lightning Experience			✓	
Export Reports as Files from Lightning Experience			✓	
Filter Reports by Clicking on Charts in Lightning Experience	✓			
Undo and Redo Actions in the Lightning Experience Dashboard Designer	✓			
Combine Small Groupings to Keep Donut and Funnel Charts Readable in Lightning Experience	✓			
Use SOQL to Identify Reports Used by Dashboard Components		✓		
Sort Records in Reports and Dashboards by Encrypted Fields			✓	
Standard Users Have Access to Their Login History	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Wave Analytics: Take Data Analysis to the Next Level				
Take Trailhead to Learn All About Wave Apps	✔			
A Whole New Wave of Apps		✔		
Extend Wave Everywhere				
Collaborate on Flex Dashboards with Annotations			✔	
Download the Data from Explorations as .Csv or Excel Files			✔	
No More Slides: Present Live Dashboards and Lenses	✔			
Share Unsaved Lenses and Private App Assets	✔			
Include Sharing Options in Embedded Dashboards		✔		
Embed Wave Dashboards in Lightning Pages (Generally Available)		✔		
Share Wave with Communities More Easily and Securely	✔			
Explore, Visualize, and Design				
New Chart Types Expand Wave Visualization Capabilities	✔			
Enhancements to Flex Dashboard Designer (Beta)	✔			
Other Enhancements in Wave Exploration and Dashboards	✔			
Accelerate Analytics With Wave Apps				
Get Even More from Your Sales Data with the Brand New Sales Wave App				
Reset and Upgrade Features Help You Keep Wave Apps up to Date			✔	
Supercharge Service Cloud Analytics With Service Wave, Now Generally Available	✔			
Integrate Data				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Data More Frequently	✓			
Build More Complete Hierarchies	✓			
Develop on the Wave Platform				
Take Advantage of New SAQL Functionality		✓		
Add Annotations with the REST API		✓		
Improve Your Dashboards with New XMD Elements		✓		
Review Change to XMD REST API		✓		

Service: Enhanced Field Service, Quick Setup with Templates

Empower your field-service agents with Knowledge articles and milestones on work orders. Set up Service Cloud features in a few clicks with Launch Pad templates. And enable Social Customer Service faster and leverage its extended breadth.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Field Service				
Knowledge Is Power for Field Techs			✓	
Achieve Greatness in the Field with Field Service Lightning (Generally Available)				✓
New Improvements to Field Service Lightning			✓	
Ensure Stellar Service with Milestones on Work Orders			✓	
Get Around Work Order Hierarchies with Ease			✓	
Salesforce Console for Service				
Set up Service Cloud Features in a Flash with Launch Pad Templates			✓	
See What's What with Responsive List Hovers			✓	
Shazam! Lightning Sidebar Components Are Here			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Say Au Revoir (and Goodbye) to Desktop CTI			✓	
New Methods for the Console Integration Toolkit		✓		
Social Customer Service				
Social Customer Service for All			✓	
Parent Posts for Improved Case Context			✓	
Instagram #hashtag Listening			✓	
Raise the Service Bar with Twitter Customer Care			✓	
More Social Accounts			✓	
Omni-Channel				
Track Agents' Active Time on Work		✓		
Limits Raised to 5,000 per Hour and 10,000 Total	✓			
No, Thanks: Let Agents Provide a Reason When Declining Work		✓		
Give Agents Peace and Quiet by Disabling Notification Sounds		✓		
Knowledge				
Page Layouts for Your Agents on the Go			✓	
Attach Articles to Work Orders			✓	
Improve Article Suggestions on Cases			✓	
Voilà: Topics on Articles Available in All Supported Languages			✓	
Case Field to Data Category Mapping (Generally Available)			✓	
Troubleshoot Your Validation Rules More Quickly			✓	
See the Original Article's Created Date on the Article Versions			✓	
Spell Checker Removed from Rich Text Fields			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Encrypt Your Knowledge Articles				
Live Agent				
See Where Chats Come from in the Chat Transcript		<input checked="" type="checkbox"/>		
Case Feed				
Let Agents Know When the System Updates Cases			<input checked="" type="checkbox"/>	
Put Your House in Order: Case Feed Auto-Response Order			<input checked="" type="checkbox"/>	
Lightning Experience Email Beautification			<input checked="" type="checkbox"/>	
Respond Even Faster to Customers with Type Ahead	<input checked="" type="checkbox"/>			
Display the From Field in the Email Quick Action			<input checked="" type="checkbox"/>	
Entitlement Management				
Enforce Required Support Steps on Work Orders			<input checked="" type="checkbox"/>	
Model Complex SLAs with Hierarchical Service Contracts			<input checked="" type="checkbox"/>	
Assets				
View Child Assets and Maintenance History	<input checked="" type="checkbox"/>			
So Long, Kiddo: Delete Assets with Child Assets	<input checked="" type="checkbox"/>			
Macros				
Let Agents Search All Text Fields with Improved Search			<input checked="" type="checkbox"/>	
Organization Sync				
Sync Larger Chatter File Posts and Comments	<input checked="" type="checkbox"/>			
No More Sync-Failure Spam	<input checked="" type="checkbox"/>			
SOS				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
SOS Gets a Makeover		✓		
Get a Little Closer: Two-Way Video with a Slick, New Interface		✓		
Introducing Service Cloud Lightning Snap-Ins for iOS (Beta)		✓		

Mobile: Do More On the Go

Give your field sales teams a boost with more intelligence built into Salesforce1. Reps and managers can drive business through meaningful insights, from top news stories about customers and competition to lively, interactive charts for tracking critical details. Is delivering first class support to customers on the go your mission? Help your agents see exactly what's going on and resolve cases faster than ever with two-way video and live camera feeds from the SOS SDK for iOS and Android.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1: News and Insights, and Continued Productivity Offline				
Salesforce1 Enhancements in This Release				
Salesforce1: Remember, iOS 9.2 Is Required on iOS Devices	✓			
Salesforce1: New Android Tablet Support for the Downloadable App	✓			
Salesforce1: New Windows 10 Phone Support for the Mobile Browser App	✓			
Salesforce1: The Mobile Browser App Can Run in Some Unsupported Browsers on iOS Devices	✓			
Salesforce1: Internet Explorer 11 Retirement Impacts Windows 8 Phones Users			✓	
Salesforce1: Remember, Support for the Mobile Browser App on BlackBerry Devices Ends with Winter '17	✓			
Salesforce1: Quickly See If Related Lists Include Records	✓			
Salesforce1: Display of Reports in the Salesforce1 for iOS Navigation Menu	✓			
Salesforce1: Change a Record's Owner	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1: See Helpful Labels in All Action Bars in Salesforce1 for iOS	✓			
Salesforce1: Find All News in One Place			✓	
Salesforce1: Get Account Insights on Opportunities			✓	
Salesforce1: See Company Logos on Accounts (Beta)			✓	
Salesforce1: Track Relationships Between Accounts and Contacts (Generally Available)			✓	
Salesforce1: Team Up on Accounts			✓	
Salesforce1: Add a Default Opportunity Team with One Tap			✓	
Salesforce1: Find Notes Faster by Sorting List Views	✓			
Salesforce1: New Notes Formatting Bar in Salesforce1 for iOS	✓			
Salesforce1: Just Picture It—Visual Notes in Salesforce1 for iOS	✓			
Salesforce1: See Further Into the Future from the Events Weekly View	✓			
Salesforce1: Choose Between Record Types When Creating Events	✓			
Salesforce1: See the Forest and the Trees on Task Lists in the Downloadable Apps (Tablets Only)	✓			
Salesforce1: List Item Actions Replace the Action Bar on Task Lists (Tablet Only)	✓			
Salesforce1: Placeholder Labels Fill Out Empty Fields in the Task List	✓			
Salesforce1: Send Email with SalesforceIQ Inbox	✓			
Salesforce1: Access Salesforce Knowledge Articles in Salesforce1 for iOS (Generally Available)			✓	
Salesforce1: Use Field Service Lightning On the Go				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1: Streamline Field Service with Work Orders in Salesforce1 for iOS			✓	
Salesforce1: Track Purchased Products with Assets in Salesforce1 for iOS			✓	
Salesforce1: Legacy Charts to Begin Phased Retirement in Winter '17, Full Retirement in Spring '17			✓	
Salesforce1: View Enhanced Charts on Tablets (As Well as Phones)			✓	
Salesforce1: Dress Up Your Data with New Enhanced Chart Types	✓			
Salesforce1: Keep Donut, Pie, and Funnel Charts Readable by Combining Small Groupings	✓			
Salesforce1: Easily Read Data-Dense Charts in Dashboard Components	✓			
Salesforce1: Keep Filters When Drilling into Reports from Dashboards	✓			
Salesforce1: View Custom Formula Field Images and Links in Salesforce1 Reports	✓			
Salesforce1: Access and Share Box Files			✓	
Salesforce1: Access Knowledge Articles from Communities			✓	
Salesforce1: Run Flows from App Home Lightning Pages (Pilot)				✓
Salesforce1: Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps (Beta)			✓	
Salesforce1: Test Current Network Conditions	✓			
Salesforce1: Get Enhanced Security for Salesforce1 for iOS with Mobile Device Management (MDM)			✓	
Salesforce1: Downloadable Apps Don't Share Authentication With In-App Browsers		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce1: New Color Palette for Salesforce1 for iOS	✓			
Salesforce1: Copy and Paste Text on Record Detail Pages	✓			
Salesforce1: We've Switched to iOS and Android Date and Time Selectors	✓			
Salesforce1: Close Popup Windows Like in Lightning Experience	✓			
Salesforce1: See More Record Data Without Scrolling	✓			
SOS SDK: An Improved Interface and Two-Way-Video		✓		
Salesforce Classic Mobile: Free Version No Longer Available for New Orgs and Some Existing Orgs		✓		
SalesforceA: More User Management Options with Version 3.2 for iOS				
Assign and Remove Permission Sets on the Go				

Communities: Pre-Moderation, Profile-Based Page Visibility, Global Search, and More

Greater control, more flexibility, and enhanced customizations—that's what you see throughout Communities in Summer '16. With pre-moderation, community managers can approve posts before they're published and freeze members who post inappropriate content. Profile-driven page visibility in Community Builder lets admins target community pages to members with specific profiles. And global search makes it easy for community members to search all the records available to them through the community. The list goes on...

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhance Security with LockerService for Communities (Critical Update)			✓	
It's Time to Update Your Community Templates			✓	
New Requirements for Allowing Guest Community Users to Log a Case			✓	
Chatter and Files in Community Templates				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Insert Inline Images in the Publisher	✓			
Attach More Files to Your Posts				
Add and Remove Files When Editing Posts	✓			
Set Profile Visibility in Communities	✓			
Improved Look and Feel for Compact Feed		✓		
Share, Revise, and Publish Formatted Code Snippets			✓	
Community Templates				
Give Community Members What They're Looking for with Improved Search		✓		
Do More with Topics				
Add More Context to Your Topic Pages		✓		
Translate Topic Names and Descriptions for Communities with a Global Audience (Generally Available)		✓		
Easier Content Curation and Improved SEO with Topics		✓		
Give More Visibility to Your Featured Topics		✓		
Endorse Members on Topics They Know About on the User Profile Page		✓		
Choose from More Topics When Setting Up Featured Topics		✓		
Get Creative with Flexible, Customizable Tabs		✓		
Enhanced Navigation for Your Community Members		✓		
Discover Related Questions (Beta) and Articles (available within 24 hours after the release)		✓		
Exclude Internal Community Members from the Reputation Leaderboard Component			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add a Files List to Community Pages		✓		
New Name for the Home Page Tabs Component		✓		
Community Builder				
Control Who Sees What with Profile-Based Page Visibility		✓		
Manage Pages More Easily with the Streamlined Page Manager		✓		
Leverage Lightning Design Tokens to Brand Custom Components		✓		
Community Builder Settings Have a New Home		✓		
Community Management				
Pre-Moderation—Review Posts from Your Community Members (Beta)			✓	
Protect Your Community from Spammers with Rate Limiting Rules			✓	
Target Specific Members in Your Moderation Rules with Member Criteria			✓	
Manage Problem Members with Freeze			✓	
Find Everything About Community Moderation in One Place	✓			
Moderate Private Messages in Your Community			✓	
Community Insights				
Actionable Insights—Your Community Manager's Dreams Come True			✓	
Community Management Insights Section Is Now Called Engagement	✓			
Manage Pending Posts, Flagged Items, and Frozen Members with Preconfigured Insights			✓	
See the Contents of Posts, Comments, and Private Messages Directly in Insights Reports			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Community Dashboards and Reporting				
Community Management Dashboards Now Refresh Automatically	✔			
Edit Your Community Management Dashboards More Easily	✔			
New Custom Report Types for Community Moderation		✔		
Take Control of Sharing Wave Analytics for Communities		✔		
Group Engagement Info in a Beautiful Package	✔			
Other Changes in Communities				
Chatter Answers: Change in Availability in Summer '16	✔			
Communities Now Supports End-User Languages		✔		
Allow Internal Users to Log In Using the Community Login Page			✔	
Delegated External User Admin Permission Now Available for Napili-Based Community Members		✔		
Navigation Between Community Builder, Developer Console, and Your Community Just Got Easier		✔		
Smoother Navigation from Links for Community Members	✔			
Communities Offers Better Identity Verification		✔		
Build Your Group Membership in a Flash	✔			
Broadcast Groups Now in Community Templates	✔			
Add Profile Tabs in Templates				

Chatter: Improved Look and Feel, Group Activity Info, Larger Group and Profile Photos

Enjoy Chatter's improved look and feel in Lightning Experience, access group activity information in a handy tab, and upload bigger, high-resolution photos to your groups and profile. There are several other improvements to feeds, groups, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Feeds				
Streamlined Look and Feel for Chatter in Lightning Experience	✔			
Scroll, Scroll, Scroll Your Feed Gently down the Screen	✔			
See Who Liked Your Post in Lightning Experience	✔			
Mute a Feed Item from Its Detail View	✔			
More URLs Get Rich Media Previews	✔			
Keep Feed Tracking Updates for Less Time				✔
Groups				
Group Activity Info Is Just a Click Away	✔			
Get Engagement Info for All Groups in One Report		✔		
Add Record Types to Groups (Beta)		✔		
Email on Announcement Beta Continues and Expands to Communities				✔
Add Group Members in a Bunch	✔			
Group Pics Go Big	✔			
User Profiles				
Add Sharpness to Your Profile with Large, High-Resolution Photos	✔			
Change Tabs in Lightning Experience and Templates		✔		
Other Changes in Chatter				
Include Salesforce1 Download Badges in Chatter Email Notifications	✔			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Control When Email Digests Are Sent with API-Only Chatter Digests				
Update IE to Support TLS1.1 for Chatter Desktop Client for Windows				

Files: Assign Topics to Files, Browse External Files in Lightning Experience, Connect to Box

Add topics to files, set file access by record, check out external files in Lightning Experience, and much more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Make Files More Visible with Topics				
Toggle Between "Viewer" and "Set by Record" File Access				
Delete Files Included in Content Packs				
Browse External Files from Files Home in Lightning Experience				
Connect to Box from Salesforce (Generally Available)				
Control Whether a Files Connect External Object Is Searchable				
Customize File Downloads (Pilot)				

Search: Find What You're Looking For Faster

The search experience continues to evolve with users' needs. In Lightning Experience, a more consistent search scope bar order aids navigation on the search results page. We're delivering improved person account and inactive user search results. And spell correction expands to more objects.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search Scope Bar Order Matches the Navigation Menu in Lightning Experience				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search: Other Changes				
Search for People Based on Address and Title	✔			
Spell Correction Expanded to More Objects	✔			
Improved Currency Formatting in Search Results in Lightning Experience	✔			
Inactive Users Show Up in Search Results in Lightning Experience	✔			
Encrypt Your Search Index			✔	

Data.com: Prospect for Accounts in Lightning Experience, Critical Insights on Opportunities, and More

More key Data.com features are available in Lightning Experience. Data.com Prospector users can check out critical information on companies associated with their opportunities. They can prospect for new companies right from the Accounts page, and access company and industry insights from an account or opportunity. Data.com Premium Clean customers automatically enrich leads with critical company information such as revenue, employee count, and industry. Data.com is available in Salesforce Classic and Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Data.com Prospector				
Get Prospecting Insights from Your Opportunity and Account Detail Page	✔			
Find and Add New Accounts from the Account Page in the Lightning Experience		✔		
Data.com Clean				
Automatically Enrich Leads with Critical Company Information (Generally Available)			✔	
Retirement of Data.com Social Key		✔		

Customization: Lightning Pages Galore and Visualizations for Your Org's Activities

What new point-and-click powers have we unleashed this time? Let us count the ways! Lightning page admins can edit not only record pages but the Home page, too. Get stunning Wave visualizations of your org's activities, like who's logging in from where. And if automation is your game, your processes don't have to stop after an action group is executed—they can keep going like the little process that could.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning App Builder				
Create and Edit Lightning Experience Record Pages (Generally Available)		✔		
Home: Customize Home for Different User Profiles (Generally Available)			✔	
Add Your App Pages to Lightning Experience		✔		
Assign Filters to Report Chart Components in Lightning Experience		✔		
Event Monitoring				
Event Monitoring Wave App (GA)			✔	
Process Builder				
Processes Can Execute Actions on More Than One Criteria		✔		
Picklist Administration				
Supercharge Your Picklist Fields with Global Picklists (Beta)			✔	
Track Where Global Picklists Are Used More Easily			✔	
Eliminate Picklist Clutter with Restricted Picklists (Generally Available)		✔		
Organize Restricted Picklists by Managing Inactive Values			✔	
Remove a Picklist Field Value from Records			✔	
Lightning Experience Setup				
Control Which Users Immediately Switch When Lightning Experience Is Enabled			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Edit Objects Directly from the Setup Menu in Lightning Experience		✓		
View Your Lightning Record Pages in the Object Manager		✓		
Search Lightning Experience Setup with Global Search		✓		
Data Import				
Legacy Data Import Tools to Retire in February 2017	✓			
Data Import Wizard Enhancements for Matching by External ID	✓			
Data Import Wizard Enhancements for Email Notifications	✓			
Visual Workflow				
Trust Percent Values in Flow sObject Variables Again (Critical Update)			✓	
Access Cross-Object Owner Fields in Flow		✓		
Give Your Lightning Experience and Salesforce1 Users the Power of Flows (Pilot)				✓
Customize the Look and Feel of Flow Interviews (Pilot)				✓
External Data				
You Say Potato, I Say Salesforce Connect		✓		
Control Whether an External Object Is Searchable		✓		
Have Your Hyphens and Search Them Too	✓			
Separately Load Related Lists with Fewer Clicks		✓		
Other Changes in Customization				
Override a View Action with Both a Visualforce Page and a Lightning Page		✓		
\$Action Global Variable Changes		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Grant Access Based on Activated User Sessions (available within 24 hours after the release)			✓	
Account Team and Opportunity Team Users Appear Separately on Sharing Pages	✓			
Make Sure Records That Are Submitted Behind the Scenes Are Routed to the Right Approval Process (Critical Update)			✓	
For Whom the Data Loads		✓		
Field Detail Labels Updated in Profile Page		✓		
Visualforce Quick Actions Now Render Properly in Salesforce1 and Lightning Experience		✓		

Security and Identity: More Security Measures, More Encryption Coverage, Easier Switching Between Orgs

We've improved two-factor authentication management, provided more security measures around identity verification, and now require the HTTPS protocol to log in. Encryption now supports Lightning Experience, protects more fields, and secures data in even more apps. Also, your users can easily switch between orgs with the user switcher.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Authentication and Identity				
Save the Day by Generating a Temporary Verification Code for Users in Distress		✓		
Delegate Two-Factor Authentication Management Tasks		✓		
Changed Name for "Manage Two-Factor Authentication" Permission		✓		
Simplify Salesforce Navigation with the User Switcher	✓			
Email Notifications to Users Confirm Added Verification Methods	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
See How Your Users Are Verifying Their Identity				
View User Identity Verification Methods		✓		
View and Customize Identity Verification Reports		✓		
Maintain Identity Verification on Public or Shared Devices	✓			
Implement Advanced Authentication for iOS Users of Custom Domains			✓	
Improved Session Security for OAuth 1.0 Token Exchanges	✓			
New X_ReadOnlyMode Parameter in OAuth 2.0 Responses		✓		
Get More Specific Login Type Reporting in Login History		✓		
Endpoint Routing for User Interface Logins No Longer Supported	✓			
Identity Verification Labels and Email Are Easier to Understand	✓			
Log In Even Faster with the Salesforce Authenticator App	✓			
Shield Platform Encryption				
More Apps Work With Encrypted Data			✓	
Encrypt Custom Fields in Managed Packages			✓	
Encrypt Custom Date Fields			✓	
Encrypt Knowledge Article Fields and Attachments			✓	
Sort Records in Reports and Dashboards by Encrypted Fields			✓	
Bring Your Own Encryption Keys (Pilot)				✓
Encrypt Your Search Index (Pilot)			✓	
Other Changes				
Logging In to Salesforce Requires HTTPS	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track TLS Protocol and Cipher Suite Data for User Logins	✓			
New Orgs Require TLS 1.1 or Later	✓			
Fix Risks in Login Access Policies and Remote Site Settings with Health Check		✓		
Easily Retrieve Security and Risk Data with the Health Check API		✓		
Access to Security Health Check Limited to Administrators		✓		
Transaction Security Standard Policies Expanded			✓	
Transaction Security Data Export Clarification			✓	
DML Isn't Supported in Transaction Security Policies			✓	

Deployment: More Included Sandboxes

You now have new ways to deploy changes to your org. Enhancements include lots more sandboxes for some editions.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Download the Force.com Migration Tool from a New Location		✓		
New Change Set Components		✓		
"Modify All Data" Permission Required for Using Inbound Change Sets and Editing Deployment Connections		✓		
Sandbox Enhancements		✓		

Development: Create Your Own Salesforce App

Whether you're using Visualforce, Apex, Lightning components, or our APIs with your favorite programming language, these enhancements to Force.com help you develop amazing applications and integrations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Debugging				
Manage Logging More Easily		✓		
View Time Zones in Debug Logs		✓		
View Visualforce Controller Exceptions in Debug Logs		✓		
Use DebuggingHeader Consistently Across the APIs		✓		
Manage Your Apex Debugger Sessions in Lightning Experience				✓
Review Debug Logs Without Sifting Through Extra Log Lines		✓		
Custom Metadata Types				
Get Even More Meta with Relationship Fields for Custom Metadata Types (Pilot)				✓
Added Picklist Support for Custom Metadata Types (GA)		✓		
Visualforce				
Visualforce for Lightning Experience is Generally Available		✓		
Set the Page Title in Lightning Experience with the <apex:page> title Attribute		✓		
Control Scroll-Based Zooming in Visualforce Maps		✓		
Fix for Rendering Quirks When SVG Namespace Added to Page		✓		
Disable Custom DocTypes in Visualforce Markup (Critical Update)			✓	
"PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed			✓	
Apex Code				
Increased Cross-Namespace Limits		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Take More Control over Your Connected Apps with the Enhanced Connected App Plug-in		✓		
Provision Your Connected Apps with Confidence		✓		
View Apex Test Results More Easily		✓		
Configure Your Apex Test Runs More Easily in the Tooling API		✓		
Run SOQL Queries on PlatformAction with a LIMIT Clause		✓		
Simplify Development of Asynchronous Callouts by Using Named Credentials		✓		
Suppress Null Values When Serializing Apex Objects		✓		
Use CORS to Access Apex REST Classes		✓		
View Skeleton Code for Global Apex Classes in Installed Managed Packages		✓		
Get a Map of Populated SObject Fields		✓		
New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces				
New Apex Class		✓		
Changed Apex Classes		✓		
ConnectApi (Chatter in Apex)				
New and Changed Chatter in Apex Classes		✓		
New and Changed Chatter in Apex Input Classes		✓		
New and Changed Chatter in Apex Output Classes		✓		
New and Changed Chatter in Apex Enums		✓		
Increased Non-Selective Query Limits		✓		
Lightning Components				
Enforce Access Check Errors (Critical Update)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhance Security with LockerService (Critical Update)			✓	
Prepare Your Lightning Components for LockerService with the Salesforce Lightning CLI		✓		
Debug Lightning Components with the Salesforce Lightning Inspector		✓		
Create Lightning Components with Configurations in the Developer Console		✓		
Reference Static Resources with the \$Resource Global Value Provider		✓		
Lightning Design Tokens (Generally Available)		✓		
More Intuitive Behavior for Abortable Actions		✓		
Improve App-Level Messaging with Powerful, Accessible Toasts		✓		
Other Changes in Lightning Components				
More Readable Styling Markup with the join Expression		✓		
Use Standard JavaScript Methods Instead of instanceof		✓		
Picklists Have an Updated Look		✓		
New and Changed Lightning Components		✓		
Changed Lightning Events		✓		
API				
WSDL Changes to Prepare for Extended Error Codes		✓		
New and Changed Objects				
New Objects		✓		
Changed Objects		✓		
SOSL				
Use Aliasing in More Statements		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Apply Localized Formatting to Numerical Fields		✓		
Return Metadata in Responses		✓		
Filter Product Searches by Price Book ID		✓		
REST API				
New Resources: Flows and Flow Interviews (Pilot)				✓
Changed Resources: SObject Basic Information, SObject Describe, and Describe Global		✓		
Changed Resource: SObject Rows by External ID		✓		
Changed Resource: Parameterized Search		✓		
Changed Resource: Relevant Items		✓		
Changed Resource: SObject Suggested Articles for Case		✓		
Changed Resource: Search Suggested Article Title Matches		✓		
Access Limit Information for Hourly OData Callouts		✓		
Limits for Industries		✓		
SOAP API				
Changed Calls		✓		
Changed Headers		✓		
Chatter REST API				
New and Changed Chatter REST API Resources		✓		
New and Changed Chatter REST API Request Bodies		✓		
New and Changed Chatter REST API Response Bodies		✓		
Reports and Dashboards REST API				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Resources: Dashboard Describe and Report Query		✓		
Changed Resource: Dashboard Results		✓		
Bulk API				
Use CORS to Access Bulk API		✓		
Bulk API for BigObjects Validates Data at Import				✓
Streaming API				
Replay Events with Durable PushTopic Streaming (Generally Available) (available within 24 hours after the release)		✓		
Apply Filters to Your PushTopic Subscriptions		✓		
Tooling API				
New Tooling API Namespaces		✓		
Tooling API New and Changed Objects		✓		
Tooling API Calls and Methods		✓		
Metadata API: New and Changed Types				
Salesforce Console API (Integration Toolkit)				
ISVforce				
Turn AppExchange Checkout Data into Insights and Actions				✓
Coming Soon to Branded Login Sites: A Clean, Modern Look		✓		
Create Trial Orgs with New Edition Templates		✓		
Log In to Branded Login Test Sites with a New URL		✓		
Encrypt Custom Fields in Managed Packages			✓	
License Management App Now Displays Installations with Long Version Numbers	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Peruse Developer Tool Download Links Without Logging In		✓		

Salesforce Overall: Automatic Geocodes and Streamlined Spell-Check

Spring '16 improves your overall Salesforce experience by offering automatic geocodes for your records' addresses and streamlining your spell-check experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 (Critical Update)			✓	
Automatically Get Geocodes for Addresses (Generally Available)		✓		
Salesforce Spell Checker is Replaced by Browser-Based Spell Check	✓			
Change a Record's Owner More Easily in Lightning Experience	✓			
Shortcuts for Currency and Number Fields in Lightning Experience				
Welcome Your Users to Lightning Experience			✓	
Get More Insight Into Whether You're Ready for Lightning Experience		✓		
Edition Name in Lightning Experience	✓			
Power Through Your Work with Efficient In-App Messaging	✓			
More Helpful Presentation of Internal Error Messages	✓			
Setup Assistant is Retiring in August 2016 for Customers Using Salesforce Classic		✓		

Salesforce Editions Better Optimized to Meet Your Business Needs

We've loaded up Professional, Enterprise, and Unlimited Edition orgs with more features. For example, Professional Edition now comes with Process Builder, Salesforce Console, Record Types, and more. Some limits have also increased, like more sandboxes for Professional, Enterprise, and Unlimited Edition orgs. Consider whether your Salesforce org still meets your company's needs. Would extra features help your business succeed? It might be time to upgrade.

EDITIONS

Available in: **Professional, Enterprise, and Unlimited Editions**

IN THIS SECTION:

[Meet Our New Editions](#)

Salesforce now offers orgs in four editions: optimized Professional, Enterprise, and Unlimited Editions, and Developer Edition, which hasn't changed. Now the choice of edition is easier than it's ever been.

[Salesforce Editions Optimized for the Sales and Service Clouds](#)

Feature availability has changed for the Sales and Service Clouds. Find out what's new.

[Limits Increased for More Power](#)

We've increased some limits for Professional, Enterprise, and Unlimited Edition orgs. Find out what's changed.

[Track Who's Using What](#)

Professional, Enterprise, and Unlimited Edition orgs include three more permission set licenses. Use the CRM User, Sales User, and Service User permission set licenses to track your org's user license usage.

Meet Our New Editions

Salesforce now offers orgs in four editions: optimized Professional, Enterprise, and Unlimited Editions, and Developer Edition, which hasn't changed. Now the choice of edition is easier than it's ever been.

For a comparison chart of the available editions and their features, see the [Salesforce Pricing and Editions page](#).



Note: Our new, optimized editions are called "Lightning." For conciseness, we omit "Lightning" in user documentation. For example, we use "Professional Edition," not "Lightning Professional Edition." All optimized editions are available in both Lightning Experience and Salesforce Classic.

If you're a Sales or Service Cloud customer, you get the changes on a rolling schedule beginning in May 2016. You can continue to use your optimized Professional, Enterprise, or Unlimited Edition org or purchase one of the other optimized editions.

If you're using a Contact Manager, Group, Personal, Performance, or Database.com Edition org, don't worry. You can continue to use it or purchase one of the optimized editions.



Tip: Make sure to bookmark this list. If your optimized edition includes features that are new to you, these videos (English only) can help you get started.

- [Avoid Unwanted Actions in Your Processes](#) (for Process Builder)
- [Entitlement Management Setup](#)
- [Introducing the Salesforce Console](#)
- [Live Agent Configuration](#)
- [Who Sees What: Overview](#) (introduces the next three videos)
- [Who Sees What: Field-Level Security](#)
- [Who Sees What: Object Access](#) (includes information about custom profiles)

-  [Who Sees What: Record Types](#)

Salesforce Editions Optimized for the Sales and Service Clouds

Feature availability has changed for the Sales and Service Clouds. Find out what's new.

Connect Offline

Now also available in Professional Edition.

Entitlement Management

Now also available in Professional Edition.



Note: Entitlement process monitoring and workflow actions for entitlement milestones aren't included in Professional Edition.

Live Agent

Now included in Unlimited Edition with the Service Cloud.

Omni-Channel

Now also available in Professional Edition.

Salesforce Console

Now also available in Professional Edition.

Service Contracts

Now also available in Professional Edition.

Salesforce Knowledge

Now included in Unlimited Edition with the Service Cloud.

SEE ALSO:

[Salesforce Help: Entitlements](#)

[Salesforce Help: Force.com Connect Offline](#)

[Salesforce Help: Live Agent for Administrators](#)

[Salesforce Help: Omni-Channel for Administrators](#)

[Salesforce Help: Salesforce Console](#)

[Salesforce Help: Service Contracts](#)

[Salesforce Help: Welcome to Salesforce Knowledge](#)

Limits Increased for More Power

We've increased some limits for Professional, Enterprise, and Unlimited Edition orgs. Find out what's changed.



Note: Contractual limits can also apply, as per your Salesforce contract.

Custom Apps

If you use a Professional, Enterprise, or Unlimited Edition org, you can now use as many custom apps as you want. For details, see [Salesforce Features and Edition Limits](#) (can be outdated or unavailable during release preview) in the Salesforce Help.

Custom Profiles

Professional Edition orgs can now use up to two custom profiles per license type.

Custom Tabs

If you use a Professional, Enterprise, or Unlimited Edition org, you can now use as many custom tabs as you want. For details, see [Salesforce Features and Edition Limits](#) (can be outdated or unavailable during release preview) in the Salesforce Help.

Field-Level Security

If you use a Professional Edition org with page layouts and add new fields, pay attention to field-level security for your new fields. Previously existing fields aren't affected.

Permission Sets

Professional Edition orgs can now use up to two permission sets.

Processes

Professional Edition customers now have access to Process Builder, our premier process-automation tool, and can use up to five processes to automate repetitive tasks.

Record Types

Professional Edition customers can now use up to three record types per object.

Sandboxes

Professional, Enterprise, and Unlimited Edition orgs include more sandboxes to use for development, testing, and training.



Note: Sandbox subscriptions are for testing and development—not production. As part of our system maintenance, we sometimes delete sandboxes that haven't been logged in to for 150 consecutive days. At least 30 days before deleting a sandbox, we'll notify you (email acceptable) to let you know that we'll delete your sandbox if it isn't logged in to within 30 or more days. If we delete your sandbox, your sandbox subscription isn't terminated. You can create another sandbox until your subscription period ends.

Developer Sandboxes Included

- Professional Edition: 10 (change sets not available)
- Enterprise Edition: 25
- Unlimited Edition: 100

Partial Copy Sandboxes Included

- Enterprise Edition: 1
- Unlimited Edition: 1

SEE ALSO:

[Salesforce Help: Field-Level Security](#)

[Salesforce Help: Lightning Process Builder](#)

[Salesforce Help: Profiles](#)

[Salesforce Help: Record Types](#)

[Salesforce Help: Sandboxes](#)

Track Who's Using What

Professional, Enterprise, and Unlimited Edition orgs include three more permission set licenses. Use the CRM User, Sales User, and Service User permission set licenses to track your org's user license usage.

For example, track user assignments for Sales Cloud features, such as Enterprise Territory Management. Just assign the Sales User permission set license to your users in sales roles who need Enterprise Territory Management. Or, track Service Cloud assignments for features such as Service Contracts.

If you're using a Professional, Enterprise, or Unlimited Edition org, the CRM User permission set license is listed.

Permission Set Licenses Permission Set Licenses Help ?					
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
CRM User	Active	20	1	19	11/10/2016
Identity Connect	Active	5	1	4	11/10/2016

See the user detail page for a specific user's assignment.

Permission Set Assignments Permission Set Assignments Help ?		
Action	Permission Set Label	Date Assigned
Del	Identity	4/13/2016

Permission Set License Assignments Permission Set License Assignments Help ?		
Action	Permission Set License Label	Date Assigned
Del	CRM User	4/13/2016
Del	Identity Connect	4/13/2016



Tip: Permission set licenses and permission sets aren't the same. A *permission set license* lets users access features that aren't included in their user license. A *permission set* expands what users can do in profiles. When you assign the CRM User, Sales User, or Service User permission set license, assignment of permission sets isn't required.

SEE ALSO:

[Salesforce Help: Permission Set Licenses \(can be outdated or unavailable during release preview\)](#)

Supported Browsers

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

IN THIS SECTION:

[Supported Browsers for Lightning Experience](#)

Lightning Experience is supported with Apple® Safari® version 8.x and 9.x on Mac OS X and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–11, you're redirected to Salesforce Classic. There are some limitations.

[Supported Browsers for Salesforce Classic](#)

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. There are some limitations.

Supported Browsers for Lightning Experience

Lightning Experience is supported with Apple® Safari® version 8.x and 9.x on Mac OS X and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 9–11, you're redirected to Salesforce Classic. There are some limitations.

EDITIONS

Lightning Experience available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

 **Note:** You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce1, see [Requirements for the Salesforce1 Mobile App](#).

Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Lightning Experience. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

Microsoft Internet Explorer version 11

 **Important:** Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- Users of existing orgs can continue to use IE11 to access Lightning Experience until December 16, 2017.
- Users of new orgs created after Summer '16 can't use IE11 to access Lightning Experience. Instead, IE11 users are automatically redirected to Salesforce Classic.

For more details about this change, see [Retirement of Support for Accessing Lightning Experience and Salesforce1 Using Internet Explorer 11](#).

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Compatibility View feature in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatibility` header, isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.
- Drag and drop of files into feed comments isn't supported in Internet Explorer.

For configuration recommendations, see [Configuring Internet Explorer](#).

Mozilla® Firefox®, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see [Configuring Firefox](#).

Google Chrome™, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

 **Note:** The latest stable version of Google Chromium™ is supported.

Apple® Safari® version 8.x and 9.x on Mac OS X

There are no configuration recommendations for Safari.

Safari isn't supported for:

- Salesforce CRM Call Center built with CTI Toolkit versions earlier than 4.0
- Salesforce Wave Analytics

Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer version 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Google Chrome, make sure that the system setting `Show scroll bars` is set to **Always**.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11, Apple® Safari® version 8.x on Mac OS X, and Microsoft® Edge for Windows® 10. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. There are some limitations.

- 📌 **Note:** Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce1, check out [Requirements for the Salesforce1 Mobile App](#).

Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Salesforce Classic. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.
- Microsoft Edge isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.

Microsoft Internet Explorer versions 9, 10, and 11

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is supported in Internet Explorer 9, 10, and 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- Both Compatibility Mode and the Compatibility View in Internet Explorer aren't supported.

EDITIONS

Salesforce Classic available in: **All Editions**

- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.
- Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.
- Internet Explorer 9 isn't supported for Salesforce Wave Analytics.
- Internet Explorer 9 and 10 aren't supported for the Lightning App Builder.
- Internet Explorer 9 users don't have browser-based spell check.
- Drag and drop of files into feed comments isn't supported in Internet Explorer.

For configuration recommendations, see [Configuring Internet Explorer](#).



Note: Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

Mozilla Firefox, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox.

- Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service.

For configuration recommendations, see [Configuring Firefox](#).

Google Chrome, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

Chrome isn't supported for:

- The Console tab (The Salesforce console is supported.)

Apple Safari versions 8.x on Mac OS X

There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.

Safari isn't supported for:

- The Salesforce console
- Salesforce CRM Call Center built with CTI Toolkit versions below 4.0
- Salesforce Wave Analytics

Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer versions 10 and 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for June 2016 for sandbox orgs and early 2017 for production orgs.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting `Show scroll bars` is set to **Always**.

- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

Some features in Salesforce—and some desktop clients, toolkits, and adapters—have their own browser requirements. For example:

- Internet Explorer is the only supported browser for:
 - Standard mail merge
 - Installing Salesforce Classic Mobile on a Windows Mobile device
 - Connect Offline
- For the best experience with the enhanced page layout editor, use Firefox.
- For the best experience on machines with 8 GB of RAM in the Salesforce console, use Chrome.
- Browser requirements also apply for uploading multiple files on Chatter.

Lightning Experience: A Modern and Intelligent User Experience

Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs. Check out the new features and considerations in this release.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Lightning Experience Features in This Release](#)

Here's the list of the powerful features and enhancements that make Lightning Experience the go-to interface for selling smarter and faster. Use this list to quickly access the details about each feature. (Some Lightning Experience features, including email enhancements and shared contacts to multiple accounts, are available within 24 hours after the Summer '16 release. Otherwise there's no wait.)

[What's Not Available in Summer '16 Lightning Experience Features](#)

For new Lightning Experience features and enhancements, review these topics to see if any functionality that's critical to your business is limited or unavailable in this release. Remember that your users can always access features not yet supported in Lightning Experience by switching to Salesforce Classic.

[Lightning Experience Bids Farewell to Internet Explorer 11](#)

Support for Microsoft Internet Explorer version 11 to access Lightning Experience will begin to retire in Summer '16.

Lightning Experience Features in This Release

Here's the list of the powerful features and enhancements that make Lightning Experience the go-to interface for selling smarter and faster. Use this list to quickly access the details about each feature. (Some Lightning Experience features, including email enhancements and shared contacts to multiple accounts, are available within 24 hours after the Summer '16 release. Otherwise there's no wait.)

Core Sales

Contacts: Associate a Contact with Multiple Accounts (Generally Available)

Contacts to Multiple Accounts lets your sales reps easily manage the relationships between people and businesses without creating duplicate records.

Team Up to Sell More with Opportunity Teams in Lightning Experience

Your reps can improve the efficiency of sales teams by adding opportunity teams to their opportunities. Team roles show who's who on the team, and help the team coordinate to sell more. The opportunity owner can grant opportunity team members on opportunities teams special access to records related to the opportunity. Previously, you had to switch back to Salesforce Classic to enable opportunity teams or set up team roles. Now, you can access settings for opportunity teams without leaving Lightning Experience.

Add Default Opportunity Teams in Lightning Experience

Your reps can add a default opportunity team to opportunities with the click of a single button without leaving Lightning Experience. The opportunity owner or someone above the owner in the hierarchy adds the opportunity owner's default opportunity team by clicking **Add Default Team** on the opportunity team related list in Lightning Experience, Salesforce Classic, or the Salesforce1 mobile app.

See Up-to-Date News on Opportunities with Insights

Give your sales reps instant access to the latest news directly from their opportunities.

Team Up to Work Accounts in Lightning Experience

Your sales reps can coordinate and simplify a sales team's access to accounts by setting up an account team in Lightning Experience. Account team members have increased access to the account and its related records. Previously, account teams were only available in Salesforce Classic.

Create New Accounts Lightning Fast with Account Autofill

Creating new accounts just got quicker than ever. When reps start typing a company in the `Account Name` field, we'll offer up suggestions. Less time entering data—what's not to love?

Visualize Your Business Like Never Before with Account Logos (Beta)

They say a picture is worth a thousand words, but there's just one word to describe the fact company logos are now shown on account records—awesome.

Find All News with One Click with the News App

The News app is a one-stop shop where your users can quickly catch up on the latest happenings about the companies and industries that matter most to them.

Opportunity Products: Find Products with Ease in Lightning Experience

Your sales reps can add products to your opportunities more quickly with most recently used products suggestions and autofill search. Enhancements to product search will be available two weeks after release.

Sales Productivity

List Views: Target Relevant Data with List View Enhancements for Lightning Experience

With the addition of filter logic, enhanced list view display and controls, and auto-complete search in Lightning Experience, sales and service professionals can take advantage of powerful ways to zero in on relevant data.

Home: Customize Home for Different User Profiles (Generally Available)

You asked for it, and we've delivered! Use the Lightning App Builder to create custom Home pages that appear for different profiles in your org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records!

Lightning Voice: Make and Receive Phone Calls Right from Salesforce (Generally Available)

Use phone features without ever leaving Salesforce! Your sales reps can now make and receive calls, add call notes, and log their call information with ease. It just takes a single click from phone number fields in Lightning Experience, such as numbers on contacts, leads, and list views.

Let Your Users Send Email Through Gmail or Office 365

Streamline email correspondence by letting your users connect their Gmail or Office 365 account to Salesforce. Then, any emails they send from Salesforce go through Gmail or Office 365. That means recipients see emails that come from your users' addresses and not from a Salesforce address. Email deliverability and compliance are also automatically handled by Gmail or Office 365.

Get a Better Email Detail Page that Shows What Users Expect

After enabling Enhanced Email, the email detail page shows emails in their original format like users expect from email apps like Gmail.

Tailor Email to Support Your Business's Needs

With Enhanced Email, you and your users get a host of features that powers email to work for your business, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case.

Enhanced Email Enabled by Default

Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case. If you use Email-to-Case and you're ready to enable Enhanced Email, use these steps.

Share Notes with Other Users or Groups

Sales users can now collaborate more easily by sharing notes with their teammates or Chatter groups. Recipients of a shared note can view notes but not edit them.

Reps Can Add Meaning to Notes with Rich Text

Your sales reps can now add formatted text to notes using the formatting options in the composer window, or via copy-and-paste.

Preview All Your Related Lists in Lightning Experience

We all know that related list previews make life easier. Now you can preview all your related lists. Previously, you could preview only the first eight lists in Lightning.

Highlights Panel Shows off More Fields

Ever wish the highlights panel would show more of the fields you've customized in your compact layouts? Well, you're in luck! Starting in Summer '16, the highlights panel shows up to the first seven of the fields from the compact layout of that entity. Previously, the highlights panel only showed up to the first five fields.

Customize Your Related List Sorting Preferences in Lightning Experience

The related list sorting preferences that users set in Salesforce Classic now stick around when they switch to Lightning Experience or use the Salesforce1 mobile app. Even better, users can now adjust their related list sorting directly from Lightning Experience, so they can see their data in the new interface just the way they want. And the cherry on top—sorting preferences set in Lightning Experience are picked up the next time the user switches to Salesforce Classic or accesses Salesforce1. Consistency never felt so good!

Create a Calendar from Anything in Salesforce

Do you and your users want an easy, visual way to track upcoming or ongoing campaigns? Support cases? Retail store events? Opportunities due to close? In seconds, anyone can create a calendar from a standard or custom object by choosing a date field representing data they want to track. The calendar displays data in that field as calendar items. Users can customize most calendars by applying a list view, and they can edit and delete calendars they've created. Some considerations apply to creating calendars.

My Opportunities Calendar (Beta) Retired—Now You Can Create Your Own Calendars

We've retired the My Opportunities calendar after a successful beta release. You can re-create it, and easily visualize the dates on other Salesforce objects, using a new feature for creating calendars—see [Create a Calendar from Anything in Salesforce](#).

Email Looks Like Email in the Activity Timeline

We've improved the way email records look in the activity timeline—now they look the way you expect emails to look. Fields like From, To, and Subject are easy to scan.

Use the Activity Timeline to Work Your To-Do List Faster

Now sales reps can log calls and update upcoming meetings and tasks faster, without leaving the activity timeline. A new menu on timeline items contains actions for updating activities.

In the Task List, Edit Tasks Inline

Now your sales reps can update tasks fast, without switching between list and detail pages.

Activity Timeline Display No Longer Controlled by Related Lists

You no longer have to include related lists in your object layouts to display next steps and past activity in the activity timeline.

Microsoft® Integration

New Design Maximizes Space in Outlook 2016

See more of Salesforce in less space. In Outlook 2016, Lightning for Outlook now appears as a side panel, which makes the most of vertical space and improves your sales reps' experience.

Relate Outlook Calendar Events to Salesforce Records

Sales reps can now relate specific Outlook events to relevant Salesforce records.

Search for Salesforce Records in Microsoft Outlook

We've made life easier for your reps when it comes to finding their Salesforce records while working with email and appointments in Outlook. Let's say your reps select an email or appointment in Outlook, but the Salesforce records your reps want to see don't appear. Now your reps can search for specific Salesforce records directly in Outlook.

Streamlined Login Process

We want to make a good impression for your reps when they log in for the first time. We've improved the flow and made the process easier.

Find Lightning for Outlook More Easily in Outlook 2016

Easily find Lightning for Outlook directly on the ribbon in Outlook 2016.

Lightning for Outlook Available in Group and Professional Editions

If your company uses Salesforce Group or Professional editions, your sales reps can now take advantage of Lightning for Outlook perks.

Sales Reps Can Delete Syncing Events in One Action

Help your reps manage their events efficiently. Set up reps to delete events from both their Exchange-based calendars and Salesforce in one action.

Let Sales Reps Select Which Exchange Events Sync to Salesforce

Sales reps have tons of appointments on their calendars, but only a subset of those events contains valuable data reps want to track in Salesforce. Now you can set up your reps to select only the Exchange events they want to sync to Salesforce.

Get More Information About Your System Status at a Glance

Stay a step ahead of sync issues and get more details about how the feature is functioning—all from the same page in Salesforce Setup.

Reports and Dashboards

Dress up Your Data with New Charts in Lightning Experience

We've added a bunch of new chart types to Lightning Experience: funnel, scatter, combo, and cumulative line charts. Also, table charts now show totals in Lightning Experience dashboards (after you set them up in the Salesforce Classic component editor).

Collaborate with Others on Report and Dashboard Feeds in Lightning Experience

Feeds are now available on reports and dashboards in both Lightning Experience and Salesforce Classic.

Export Reports as Files from Lightning Experience

Now you can export reports from both Lightning Experience and Salesforce Classic.

Filter Reports by Clicking on Charts in Lightning Experience

While reading a report, click a report chart grouping to filter the report.

Undo and Redo Actions in the Lightning Experience Dashboard Designer

Everybody makes mistakes. Worry not, mistakes are easily corrected. At least, they are in the Lightning Experience dashboard designer thanks to the undo and redo buttons.

Combine Small Groupings to Keep Donut and Funnel Charts Readable in Lightning Experience

To ensure that Lightning Experience donut and funnel charts are human-readable, combine small groupings into one.

Service

View Child Assets and Maintenance History

Two new related lists on asset pages give you an accessible view of an asset's child assets and linked work order line items.

So Long, Kiddo: Delete Assets with Child Assets

You can now delete an asset that has child assets. If you delete an asset that's part of an asset hierarchy, keep in mind that its child assets are no longer linked to its parent asset.

Let Agents Know When the System Updates Cases

Rename the `Automated Case User` to `System` so support agents can easily see when automated processes, such as case assignment rules, create a case or change the status of a case.

Put Your House in Order: Case Feed Auto-Response Order

Change the order of case feed items and records, so feed items that are automatically generated appear after the customer's first email to your support center.

Lightning Experience Email Beautification

We've redesigned the Lightning Experience email action to save screen real estate and improve usability, making it even simpler for agents to send email.

Respond Even Faster to Customers with Type Ahead

Addressing emails in Case Feed just got faster. When an agent enters a few letters of a person's name or email address, Type Ahead automatically suggests matching names and addresses, just as in Gmail. If multiple names or email addresses with the same letters match the letters that the agent entered, a drop-down appears showing all matches across Contacts, Leads, and Users.

Display the From Field in the Email Quick Action

Now, you can add the From field to the email quick action Lightning Experience, so agents can see it when reading and writing emails in Case Feed.

Attach Articles to Work Orders

Make it easier for technicians in the field to quickly find the information they need. A new option to attach Knowledge articles to work orders and work order line items lets you incorporate your Knowledge base into your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Ensure Stellar Service with Milestones on Work Orders

Entitlement management and work orders are tying the knot, and you're invited! With milestones now available on work orders, you can link entitlement to work orders and define and track required steps in your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Get Around Work Order Hierarchies with Ease

Several new enhancements make it easier for you to view and build out hierarchies of work orders and work order line items. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Shazam! Lightning Sidebar Components Are Here

You can now embed Lightning components in sidebars through Visualforce pages. Use the power of Lightning to empower your Salesforce experience!

Chatter

Include Salesforce1 Download Badges in Chatter Email Notifications

All Chatter email notifications from your internal org now include App Store and Google Play badges for the Salesforce1 downloadable apps. Use badges to help increase user adoption of the Salesforce1 mobile app.

Scroll, Scroll, Scroll Your Feed Gently down the Screen

The **View More** button in your feed is almost a thing of the past. In Lightning Experience, we removed all but the first **View More**, providing a smooth, continuous flow all the way to the last post. Scroll with ease in your browser or on your phone.

Streamlined Look and Feel for Chatter in Lightning Experience

Enjoy reduced visual noise, a cleaner distinction between threads, and useful controls in more familiar locations.

See Who Liked Your Post in Lightning Experience

If you've been wondering who liked your post in Lightning Experience, wonder no more! We present the **People Who Like This Post** card.

More URLs Get Rich Media Previews

More URLs than ever show previews when you attach a link to a post. We expanded our list of supported URLs from 60 to over 400. And you still get rich previews when the URLs are shortened with third-party shorteners, like bitly, goog.le, and tinyurl.com.

Files

Browse External Files from Files Home in Lightning Experience

The Files Connect functionality you love in Salesforce Classic is now available in Lightning Experience. You can browse your external sources from Files home, where you can open, share, and download external files and file references.

Connect to Box from Salesforce (Generally Available)

Let your users access, share, and search Box content right from Salesforce. Salesforce users can share Box files with other Salesforce users, Chatter groups, and records. Files Connect enforces the Box file-sharing rules, so users can choose to share a file only with specific people, with all people in the same Box domain, or to people outside the company.

Search

Spell Correction Expanded to More Objects

When users enter a search term that doesn't yield results because of incorrect spelling, they see results that match a corrected spelling of the search term. Spell correction expands to Business Account, Asset, Attachment, Campaign, Case, Contact, Lead, Note, Opportunity, User, and Task objects for English only.

Search for People Based on Address and Title

It's easier to get more specific, relevant results for the people you're looking for.

Search Scope Bar Order Matches the Navigation Menu in Lightning Experience

The search scope bar shows searchable objects in the same order they appear in the collapsible navigation menu at the left of the UI. No layout changes required. The familiar order lets users find what they want faster.

Inactive Users Show Up in Search Results in Lightning Experience

No more browsing if you need to find an inactive user.

Improved Currency Formatting in Search Results in Lightning Experience

We've changed the way that currency displays in search results. For example, instead of USD1000, users see \$1,000.00.

Data.com

Automatically Enrich Leads with Critical Company Information (Generally Available)

Make it easier for your reps to pursue the most promising leads, and assign them to the right territories and campaigns. If your org has Data.com Premium Clean, it's a cinch! In just a few clicks, you can set up and activate the new `Company Info for Leads` clean rule for your organization. Then, valuable company information from Data.com is automatically added to existing *and* new Salesforce leads, including annual revenue, industry, D-U-N-S number, and more!

Lightning App Builder

Create and Edit Lightning Experience Record Pages (Generally Available)

Customizing Lightning Experience record pages is now available to everyone! Create a record page from scratch, or make a copy of an existing record page right from the Setup menu. Give your users a customized view for each object's records by adding, editing, or removing components to change the page's layout.

Add Your App Pages to Lightning Experience

Give your users easy access to the objects and items that are most important in your custom app by activating it for Lightning Experience. The App Page type of Lightning Page, previously available only in Salesforce1, is now supported in Lightning Experience.

Assign Filters to Report Chart Components in Lightning Experience

You can now assign a filter to the data displayed in a Report Chart standard Lightning component when it displays on record pages in Lightning Experience. If you set a filter option for a Report Chart component on a record page, the component displays only that filtered data when users view the page.

Process Automation

Processes Can Execute Actions on More Than One Criteria

Now you can choose what happens after your process executes a specific action group. Should the process stop, or should it continue evaluating the next criteria in the process? It's up to you! Best of all, executing multiple action groups in a single process makes it easy to manage all of your processes for a given object, like a Case, in one place.

Give Your Lightning Experience and Salesforce1 Users the Power of Flows (Pilot)

The day is finally here! We're rolling out a flow component for the Lightning App Builder. You can now add flows to any Lightning page—App pages, Record pages, and Home pages alike.

Trust Percent Values in Flow sObject Variables Again (Critical Update)

Have you added special calculations to your flow to get the right output for a percent field? This critical update lets you remove those workarounds.

Access Cross-Object Owner Fields in Flow

Some fields have relationships to more than one object. We call these relationships *polymorphic*. For example, if you have queues enabled for cases, a case owner can be either a user or queue. If you're traversing from a case to its owner ID, add special syntax to identify which object you mean when you say "Owner".

Setup

Control Which Users Immediately Switch When Lightning Experience Is Enabled

We heard you! Before enabling Lightning Experience, you need the power to decide who gets immediately switched to the new interface and who stays in Salesforce Classic. Now you can make these choices, with the new **Switch Users to Lightning Experience** option in the Lightning Experience Migration Assistant.

Edit Objects Directly from the Setup Menu in Lightning Experience

Now you can edit objects and see object details with fewer clicks. On object home and record pages, you can select Edit Object from the Setup menu to go directly to that object's detail page.

View Your Lightning Record Pages in the Object Manager

We added a Lightning Record Pages related list to all objects that support record page editing in the Lightning App Builder. You can see all the custom record pages you've created for that object and which record page is active.

Search Lightning Experience Setup with Global Search

Now you can use global search instead of Quick Find to find specific setup records, such as the Lead Source picklist or the Sales Rep profile.

Data Import

Data Import Wizard Enhancements for Matching by External ID

For any object, you can specify an external ID field for the Data Import Wizard to find existing records that match the import data. If your import is adding only new records, the Data Import Wizard ignores the import file rows that contain matching values for the external ID field. If your import is updating existing records, the Data Import Wizard uses the import file's data to update the matching records in Salesforce.

Data Import Wizard Enhancements for Email Notifications

When you import data via the Data Import Wizard, the CSV file that you submit is queued for processing. When the import is complete, we notify you by email. We've expanded the email subject to include the CSV filename and the number of record rows it contains. Now you can quickly tell which import the email is about.

External Data

You Say Potato, I Say Salesforce Connect

Lightning Connect is now called Salesforce Connect, and the Salesforce adapter is now called the cross-org adapter. While we were updating the user interface to reflect the new names, we also did some text housecleaning.

Control Whether an External Object Is Searchable

Now you can decide whether to let users find an external object's records via SOSL and Salesforce global searches. For each external object, select or deselect the new **Allow Search** option. To make searches faster across your org, disable search for external objects that your users don't need to search.

Have Your Hyphens and Search Them Too

Hyphens are no longer removed from search query strings that Salesforce Connect OData adapters send to external systems. Now your users who search Salesforce for strings that include hyphens can find more relevant external object records. If you've set up your external system to handle the absence of hyphens in search query strings, make sure that including hyphens doesn't break your searches.

Separately Load Related Lists with Fewer Clicks

Back in Winter '16, we added a user interface setting to separately load related lists of external objects. To spare you from extra clicks, we've added common-sense dependencies between that setting and the one for separately loading related lists of standard and custom objects.

Other Changes in Customization

For Whom the Data Loads

In the Data Loader for Windows installer, we clarified a step that was confusing. In that step, what you select determines who can use Data Loader and whether Data Loader can run automated processes on the machine. The Data Loader for Windows installer now explains the step so that you can make the correct choice.

Security and Identity

Save the Day by Generating a Temporary Verification Code for Users in Distress

Generate a temporary identity verification code for users who forgot, lost, or otherwise can't access the device they usually use for two-factor authentication. The user can log in and stay productive, and you don't have to weaken security for your Salesforce org or community by removing the two-factor authentication requirement.

Delegate Two-Factor Authentication Management Tasks

A new permission lets you delegate some two-factor authentication support tasks to users who aren't Salesforce admins. All users with the "Manage Users" permission also have the new permission, and you can't remove it from those users.

Changed Name for "Manage Two-Factor Authentication" Permission

For clarity, we've changed the name of the "Manage Two-Factor Authentication" permission to "Manage Two-Factor Authentication in API." The name change distinguishes this permission from the new permission "Manage Two-Factor Authentication in User Interface."

Simplify Salesforce Navigation with the User Switcher

With the user switcher, users can now easily navigate Salesforce when they have multiple usernames on the same or different Salesforce orgs. They select their profile picture to see a list of available usernames to navigate to. Users no longer have to open a new tab, enter a login URL, and then enter their username. Their browsers aren't cluttered with several tabs, one for each Salesforce org. Now users can have a single tab for all Salesforce orgs.

Email Notifications to Users Confirm Added Verification Methods

When an identity verification method is added to a user's account, the user gets an email. The email notification increases security for your users' accounts.

See How Your Users Are Verifying Their Identity

We've made it easier for you to secure your Salesforce org or community with two-factor authentication by adding tools that show you how your users are verifying their identity. With knowledge about who's not using your preferred verification methods, you can refine your roll-out strategy and target communications to just the right people.

Maintain Identity Verification on Public or Shared Devices

Now when your users log in to Salesforce and verify their identity on a device that isn't private, they can help keep your org secure by alerting us. Ask your users to deselect the "Don't ask again" option that appears on the identity verification page when they're using a shared device or browser. Deselecting this option keeps us asking for identity verification whenever anyone logs in from that browser and device.

Implement Advanced Authentication for iOS Users of Custom Domains

If you have a custom domain created with My Domain, you have a new option to support authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of Salesforce1 and Mobile SDK applications on iOS devices. When enabled, iOS users are redirected to their native browser when using single sign-on authentication into your custom domain.

Improved Session Security for OAuth 1.0 Token Exchanges

When a connected app requests access to Salesforce data via the user interface during an OAuth 1.0 token exchange, Salesforce validates the request and sends a short-lived session ID that is valid only for `frontdoor.jsp`. Previously, the session ID could be used in the API and was eligible for validity extensions. To disable this feature, contact Salesforce.

Get More Specific Login Type Reporting in Login History

When users use an authentication provider's single sign-on (SSO) to access your Salesforce org through a customer service or partner portal, we provide more detailed entries in Login History. Previously, these login types were recorded as Customer Service Portal and Partner Portal, respectively. Now they're recorded as Customer Service Portal Third-Party SSO and Partner Portal Third-Party SSO.

Endpoint Routing for User Interface Logins No Longer Supported

We're changing our endpoint routing to deliver better performance and higher availability for our dedicated user interface login endpoints. Previously, you could use `www.salesforce.com/login.jsp` as a user interface login endpoint, which then routed you to the correct login instance. As of June 25, 2016, we are removing internal routing, and you have to change your user interface login endpoints from `www.salesforce.com/login.jsp` to `https://login.salesforce.com/login.jsp`. This change applies only to user interface login traffic. Logging in from a browser by clicking **Login** still works.

Identity Verification Labels and Email Are Easier to Understand

To reflect recent enhancements to our identity verification procedures, we've changed some labels in the user interface and slightly revised an email your users get when verifying their identity.

Deployment

Development

Improve App-Level Messaging with Powerful, Accessible Toasts

Jazz up your app's popup messaging with new attributes on the `force:showToast` API event. The new toasts entity is designed for mobile and desktop apps, and includes support for new features and enhanced user interface design.

Manage Logging More Easily

Gone are the days of hunting all around Setup to set up trace flags on users, Apex classes, and Apex triggers. You can now create all three trace flag types in one Setup location: the Debug Logs page. Easily enable logging on automated processes. And, manage your debug levels on the new Debug Levels page in Setup.

View Time Zones in Debug Logs

Debug logs now include time zone information for activity timestamps. Previously, you couldn't tell from a debug log which time zone the logged activities occurred in.

View Visualforce Controller Exceptions in Debug Logs

Debug logs now include exceptions thrown by Visualforce controllers. Visualforce controller exceptions have been visible in the Salesforce user interface, but the exceptions looked like successes in the debug log.

Review Debug Logs Without Sifting Through Extra Log Lines

Each debug log needs only one `USER_INFO` log line to record the timestamp in the user's time zone. But `USER_INFO` lines were sometimes written for each component being traced. We've fixed this bug.

Manage Your Apex Debugger Sessions in Lightning Experience

The Apex Debugger page in Setup is now available in Lightning Experience. You can purchase Apex Debugger licenses for your parent org and share them among the users in your org's sandboxes. View and terminate active sessions for your org and its sandboxes on the Apex Debugger page in Setup.

Picklists Have an Updated Look

Picklists in Lightning Experience have been updated to match the look and feel of other menus in the UI.

Visualforce for Lightning Experience is Generally Available

With this release, Visualforce is fully supported in Lightning Experience.

Set the Page Title in Lightning Experience with the <apex:page> title Attribute

In prior releases of Lightning Experience setting the page title of a Visualforce page had no effect. With this release, you can set the page's title using the `title` attribute of the `<apex:page>` tag. This sets the text used in browser windows, tabs, and bookmarks, and makes using Lightning Experience in multiple tabs a better experience.

View Apex Test Results More Easily

The new Apex Test History page shows all the test results associated with a test run. The page shows results only for tests that have been run asynchronously.

Simplify Development of Asynchronous Callouts by Using Named Credentials

You can now use named credentials in long-running asynchronous callouts from a Visualforce page's controller. A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. Salesforce manages all authentication for callouts that specify a named credential as the callout endpoint so that your Apex code doesn't have to. You can also skip remote site settings, which are otherwise required for callouts to external sites, for the site defined in the named credential.

Turn AppExchange Checkout Data into Insights and Actions

The Checkout Management App (CMA) brings the power of Salesforce to AppExchange Checkout. A beautiful dashboard visually displays AppExchange Checkout data, so it's easy to see how your offerings are performing. Automated email notifications keep customers and team members in the loop whenever activity occurs on your offerings.

Peruse Developer Tool Download Links Without Logging In

We've cleaned up the Tools page in Setup and made it easier to access what you need. This page now contains only three links, and groups the tools into categories: a comprehensive list of Force.com tools and toolkits, integration tools on the AppExchange, and admin and developer tools on the AppExchange. The linked pages feature more tools than the Setup page did, and you can access them without logging in to Salesforce.

General Enhancements

Get More Insight Into Whether You're Ready for Lightning Experience

Run the Lightning Experience Readiness Check to evaluate some of the Sales Cloud features and customizations you're using in Salesforce Classic. That way, you can learn which are ready for Lightning Experience and which need your attention before you migrate your users.

Welcome Your Users to Lightning Experience

When users find themselves in Lightning Experience, they're met with a message to welcome them to the new interface. And if users aren't ready to explore Lightning Experience yet? No problem—we provide step-by-step, pop-up instructions that describe how to switch back to Salesforce Classic.

Automatically Get Geocodes for Addresses (Generally Available)

Help your sales and marketing teams find nearby prospects, assign territories and campaigns, and more! All this is a cinch with geocodes. In just a few clicks, you can set up and activate the geocode clean rules for your org. Then, geocodes are added for addresses on existing and new accounts, contacts, and leads.

Change a Record's Owner More Easily in Lightning Experience

Your users can now change a record's owner from more places in Lightning Experience. The change owner action is available in the record's highlights panel, the actions bar, and as an icon in the Owner field on all records where the user has permission to change the owner.

More Helpful Presentation of Internal Error Messages

Hopefully your users never experience an internal error message. But for those rare occasions, we've updated the appearance and content of these messages so non-technical users are better able to understand the situation. And optionally, users now can send us information about what they were doing before the error occurred, right from the message. Which helps us make these occurrences even more scarce, so thank you!

Visualforce Quick Actions Now Render Properly in Salesforce1 and Lightning Experience

Visualforce pages called by quick actions now display correctly inside the action dialog box. The embedded Visualforce pages now fill the available space and render properly, with a scrollbar for content that exceeds the height of the action dialog box.

What's Not Available in Summer '16 Lightning Experience Features

For new Lightning Experience features and enhancements, review these topics to see if any functionality that's critical to your business is limited or unavailable in this release. Remember that your users can always access features not yet supported in Lightning Experience by switching to Salesforce Classic.

 **Note:** For the full list of feature gaps and limitations in Lightning Experience, see "What's Not Available in Lightning Experience" in the Salesforce Help.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

- [Data Access and Views: Lightning Experience Considerations](#)
- [Sales Features: Lightning Experience Considerations](#)
- [Productivity Features: Lightning Experience Considerations](#)
- [Customer Service Features: Lightning Experience Considerations](#)
- [Reports and Dashboards: Lightning Experience Considerations](#)
- [Chatter and Communities: Lightning Experience Considerations](#)

SEE ALSO:

[Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic](#)

Data Access and Views: Lightning Experience Considerations

Learn about the issues to expect when accessing data in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

List Views

Here are some considerations when creating and editing list views in Lightning Experience.

- Filter logic has been added so you can refine your list views as specifically as you want. However, NOT doesn't work with parenthetical expressions. For example, the expression `1 AND NOT (2 AND 3)` evaluates as `1 AND (NOT 2 AND 3)`. In the filter results, no records are returned when you'd expect to see some records.
- Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

Sales Features: Lightning Experience Considerations

Learn about the issues to that your Sales team can encounter in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Contacts to Multiple Accounts

Only the row level actions that are specific to the Account Contact Relationship object are available on the Related Accounts and Related Contacts related lists. Therefore, you see actions to edit or remove the account-contact relationship, but not to edit or delete the contact or account record.

In the Related Accounts related list, the `Account Name` field appears only if the user has access to the account. If they don't have access to the account, only the Account Contact Relationship fields appear.

Account Teams

It's possible to view, update, and delete account teams in Lightning Experience, with these differences from Salesforce Classic:

- Users can add, edit, or delete only one account team member at a time.
- The account team is always retained when the account owner is changed.

Switch back to Salesforce Classic to:

- Change the team member display order.
- Display access levels for all team members or delete all team members with a single button.
- Add multiple account team members on a single page.

Productivity Features: Lightning Experience Considerations

List View Filtering in Calendars

No list views are available for filtering calendars based on the Events or Tasks objects. For calendars created from other objects, list views with the scope My and All are supported, but list views with the scope My Team are not.

Calendar Item Limit

Users can view up to 150 calendar items total in the day or week view, including Salesforce events and the items on calendars that users create. Suppose that a user selects a calendar containing enough items to push the total past the limit in that view. Lightning Experience displays an alert and hides items on other calendars.

Customer Service Features: Lightning Experience Considerations

Learn about the issues to expect if your organization uses customer service tools. In general, Service Cloud data and features aren't supported in this release of Lightning Experience. Cases and assets are supported but don't have full parity with what's available in Salesforce Classic.

Assets

Assets aren't available in the Object Manager, but you can add them to custom navigation menus. You can also access the assets object home from the App Launcher and individual asset records from the object home, search, and related lists.

Linked Articles

- In Lightning Experience, linked articles are view-only. To manage linked article settings and attach or detach articles, switch to Salesforce Classic.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic.

Work Order Milestones

- Milestones are view-only in Lightning Experience. To manage milestones, switch to Salesforce Classic.
- The Object Milestones related list and milestone tracker aren't available in Lightning Experience.
- Clicking a milestone-related feed item on a work order in Lightning Experience redirects you to Salesforce Classic.

Reports and Dashboards: Lightning Experience Considerations

Learn about the issues to expect when using reports and dashboards in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Add or Edit Some Newly Available Charts from Salesforce Classic

To add one of these newly available charts to a dashboard, or to edit one, switch to Salesforce Classic:

- Combo
- Funnel
- Scatter

Some Newly Available Charts Appear as Bar Charts in Reports

These newly available Lightning Experience charts display on dashboards, but appear as bar charts in reports:

- Combo
- Cumulative Line
- Scatter

Combine Small Groups into "Others"

To combine small groups in charts, switch to Salesforce Classic. After combining small groups in Salesforce Classic, the "Other" group appears in Lightning Experience charts.

Export Reports

Reports exported from Lightning Experience never include a disclaimer that reads "Confidential Information - Do not Distribute" in the report footer. The disclaimer is excluded even if you disable the **Exclude Disclaimer from Exported Reports** setting in setup.

Chatter and Communities: Lightning Experience Considerations

Learn about the issues to expect when your users collaborate in Lightning Experience using Chatter or Salesforce Communities. Some collaboration features aren't supported. And some features don't have full parity with what's available in Salesforce Classic.

Profile Pictures

Your Community profile photo in Lightning Experience is larger and displays at a higher resolution than in Salesforce Classic. Profile photos uploaded in Salesforce Classic won't look great in Lightning Experience until you upload the photo in Lightning Experience.

Mute Feed Item from Detail View

You can't mute a feed item from its detail view.

Lightning Experience Bids Farewell to Internet Explorer 11

Support for Microsoft Internet Explorer version 11 to access Lightning Experience will begin to retire in Summer '16.

In Summer '16, the Lightning Platform adds a new advanced and flexible security architecture. These advances depend on a number of security standards that are built into modern browsers. Unfortunately, Internet Explorer 11 (IE11) doesn't support these standards.

- Users of existing orgs can continue to use IE11 to access Lightning Experience until December 16, 2017 only.
- Users of new orgs created after Summer '16 will not be able to use IE11 to access Lightning Experience. Instead, IE11 users will automatically be redirected to Salesforce Classic.

Lightning Experience supports a number of modern browsers, including Safari 8, Microsoft Edge, and the latest stable versions of Chrome and Firefox.

EDITIONS

Available in all editions

For more details about this change, see [“Retirement of Support for Accessing Lightning Experience and the Salesforce1 Mobile Browser App Using Microsoft Internet Explorer version 11”](#).

SEE ALSO:

[Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 \(Critical Update\)](#)

Financial Services Cloud: Advisor Productivity Boosts, Internationalization, and Salesforce Shield

Look out world—here comes an upgraded Financial Services Cloud. Convert leads to clients, create opportunities, and deliver service with an even more personalized touch. We've added support for multiple currencies, new locales and languages, and Salesforce Shield capabilities including Platform Encryption.

 **Note:** Be sure to read the [Financial Services Cloud Implementation Guide](#) for all the details about getting the most of these new features and enhancements.

IN THIS SECTION:

[Convert Leads to Clients](#)

Enhanced lead conversion flows help advisors focus on growing AUM. Transform leads into new clients. If a lead you're converting represents asset consolidation opportunities, create an opportunity at the same time.

[Increase Wallet Share with Advisor Opportunities](#)

When you spot an opportunity to consolidate client assets in-house, conveniently create an opportunity that's related to an investment account, bank account, or insurance policy. On the Financials tab, look for the actions icon next to the name of any financial account. Select the **New Opportunity (Wallet Share)** option, then capture the relevant details.

[Keep Track of More from the Home Page](#)

New Home page components and tools for tracking client birthdays help boost advisor productivity and strengthen client relationships.

[Easier Tracking of Clients' Relationships](#)

We've made it easier to track who's who and who knows who. New related lists on account and contact detail pages show the centers of influence that are key to cultivating new business. And, streamlined setup of reciprocal roles saves time during implementation.

[More Ownership Options for Financial Accounts](#)

Previously, a financial account owner had to be an individual client. Now, you can designate an organizational entity, such as a business or a trust, as a primary or joint owner.

[Multiple Currencies and Locales Supported](#)

We now support multiple currencies so that global firms can operate in their local currencies. If you have multi-currency enabled, some limitations apply.

[Localization in Five Languages](#)

Financial Services Cloud is now available in French, German, Japanese, Spanish, and Portuguese (Brazil). If your firm is multi-language and operates in a non-English language, the Translation Workbench must be enabled so that translated values display correctly in our components. Product documentation is available in all fully supported languages.

[Secure Confidential Client Information with Salesforce Shield](#)

We now support Salesforce Shield, a trio of security tools to help monitor data access and usage, prevent malicious activity, and encrypt data at rest. Protect your client information with Shield, which includes Event Monitoring, Field Audit Trail, and Platform Encryption.

[Removed Dependency on Chatter](#)

Chatter is no longer required for installation of Financial Services Cloud, giving you more flexibility in your implementation. If you don't want to enable it for compliance or other reasons, you don't have to. If Chatter works for your firm, simply enable feed tracking to add the Chatter feed to the client and household profile's Collaborate tab.

[Changed API Objects](#)

These objects have changed in API version 37.0.

[Limits for Industries REST API](#)

You can retrieve a maximum of 200 records in one request instead of the 2,000 records previously documented.

Convert Leads to Clients

Enhanced lead conversion flows help advisors focus on growing AUM. Transform leads into new clients. If a lead you're converting represents asset consolidation opportunities, create an opportunity at the same time.

The packaged flows for client lead conversions and opportunities are integrated seamlessly with the Financial Services Cloud data model. If a lead was created as a new B2C lead record type, when it's converted, we automatically create the client record. Configure the default settings for these lead and opportunity flows to match your sales process for new clients, then let your advisors loose on their qualified leads.

Increase Wallet Share with Advisor Opportunities

When you spot an opportunity to consolidate client assets in-house, conveniently create an opportunity that's related to an investment account, bank account, or insurance policy. On the Financials tab, look for the actions icon next to the name of any financial account. Select the **New Opportunity (Wallet Share)** option, then capture the relevant details.

To enable the feature, a simple update to page layout assignments for the Advisor profile is required. If you installed Financial Services Cloud before the Summer '16 upgrade, a few other page layout configurations are required.

Keep Track of More from the Home Page

New Home page components and tools for tracking client birthdays help boost advisor productivity and strengthen client relationships.

- Never miss a birthday again. The Birthdays component on the Home page lists the clients celebrating birthdays in the next seven days. An Upcoming Birthdays list view and report are also newly packaged.
- The Upcoming Events component on the Home page shows the next five items on your calendar today. Past events drop off as the day progresses.

Easier Tracking of Clients' Relationships

We've made it easier to track who's who and who knows who. New related lists on account and contact detail pages show the centers of influence that are key to cultivating new business. And, streamlined setup of reciprocal roles saves time during implementation.

Client and household profiles show the related entities (such as lawyers and accountants) that are associated with a client or household. Previously, you couldn't see all the clients and households that an entity had relationships with. Now, we've added related lists to account and contact detail pages so that you can visualize these extended relationships from both sides.

We've also simplified the setup task of configuring reciprocal roles. When you create reciprocal role records to describe how entities are related to clients and households, you no longer have to create two records per relationship. Create one record and we automatically create another to represent the inverse. For example, let's say that you save a reciprocal role record with the role of Client and the inverse role of Power of Attorney. We automatically create a corresponding record with the role of Power of Attorney and the inverse role of Client.

More Ownership Options for Financial Accounts

Previously, a financial account owner had to be an individual client. Now, you can designate an organizational entity, such as a business or a trust, as a primary or joint owner.

If an individual client and an organizational entity jointly own a financial account, the primary ownership determines whether the account balance is included in roll-up summaries.

- If the primary owner is the individual client, the balance is included in the client's household roll-up summary.
- If the primary owner is the organizational entity, the balance is excluded from the client's household roll-up summary.

Multiple Currencies and Locales Supported

We now support multiple currencies so that global firms can operate in their local currencies. If you have multi-currency enabled, some limitations apply.

- Advanced currency management isn't available.
- Ensure that the `Currency Iso Code` field is included on any page layout that includes a currency field.
- For each user, ensure that their user currency corresponds to the default currency for the user's locale.
- When filtering by currency values in reports or list views, users must specify a currency ISO code—such as USD or GBP—before the value. For example, `GBP100000`. The ISO code must be one of your firm's active currencies.

SEE ALSO:

[Changed API Objects](#)

Localization in Five Languages

Financial Services Cloud is now available in French, German, Japanese, Spanish, and Portuguese (Brazil). If your firm is multi-language and operates in a non-English language, the Translation Workbench must be enabled so that translated values display correctly in our components. Product documentation is available in all fully supported languages.

Secure Confidential Client Information with Salesforce Shield

We now support Salesforce Shield, a trio of security tools to help monitor data access and usage, prevent malicious activity, and encrypt data at rest. Protect your client information with Shield, which includes Event Monitoring, Field Audit Trail, and Platform Encryption.

Removed Dependency on Chatter

Chatter is no longer required for installation of Financial Services Cloud, giving you more flexibility in your implementation. If you don't want to enable it for compliance or other reasons, you don't have to. If Chatter works for your firm, simply enable feed tracking to add the Chatter feed to the client and household profile's Collaborate tab.

Changed API Objects

These objects have changed in API version 37.0.

Changes That Affect All Objects

The `CurrencyIsoCode` field is new on all standard and custom objects in Financial Services Cloud, now that we support multiple currencies. Represents the currency ISO code associated with a record, such as USD, GBP, or JPY.

Changes That Affect Multiple Objects

The `SourceSystemId__c` field is new on multiple objects to facilitate integration with external data sources.

- `AccountAccountRelation`
- `AccountContactRelation`
- `AssetsAndLiabilities`
- `Contact`
- `ContactContactRelation`
- `FinancialAccount`
- `FinancialAccountRole`
- `FinancialGoal`
- `FinancialHolding`
- `LifeEvent`
- `ReciprocalRole`
- `Securities`

Changed Objects

Account

This object has a new field.

- `IndividualType__c`—The type of Individual (currently the only valid value is Individual).

AccountAccountRelation

This object has a new field.

- `InverseRelationship__c`—Uniquely identifies the relationship between `Account__c` and `RelatedAccount__c` so that it can be referenced by a trigger that creates the inverse relationship record.

Contact

This object has new fields.

- `CreatedFromLead__c`—If `true`, the client record was created from a converted lead.
- `IndividualType__c`—The type of Individual (currently the only valid value is Individual).

ContactContactRelation

This object has a new field.

- `InverseRelationship__c`—Uniquely identifies the relationship between `Contact__c` and `RelatedContact__c` so that it can be referenced by a trigger that creates the inverse relationship record.

Lead

This object has new fields.

- `CreatedFromLead__c`—If `true`, upon lead conversion, the lead converts to a contact as a client.
- `IndividualType__c`—The type of Individual (currently the only valid value is Individual).

Opportunity

This object has a new field.

- `FinancialAccount__c`—The financial account assets related to the opportunity.

ReciprocalRole

This object has new fields.

- `CreateInverseRole__c`—If `true`, automatically creates a corresponding reciprocal role record for the inverse role.
- `InverseRelationship__c`—Uniquely identifies the relationship between `Role` and `InverseRole__c` so that it can be referenced by a trigger that creates the inverse relationship record.

Limits for Industries REST API

You can retrieve a maximum of 200 records in one request instead of the 2,000 records previously documented.

Health Cloud: Internationalization, Salesforce Shield, and Improved Patient Lists

We've been hard at work translating Health Cloud into six new languages and ensuring that protected health information (PHI) data is secure and protected. And in our spare time, we've thrown in a few usability improvements that will make customizing Health Cloud and managing your patients even easier.

IN THIS SECTION:

[Secure Protected Health Information with Salesforce Shield](#)

Take compliance, governance, and security of protected health information (PHI) data even further with Salesforce Shield.

[Multiple Languages Supported](#)

Access Health Cloud in six new languages.

[It's Easier to Create Lists of Patients](#)

We've made some usability improvements to the wizard that you and your care coordinators use to create patient lists.

[Customize the Delivered Care Team Roles](#)

The roles that people have in the healthcare world are incredibly varied. So we've given you the flexibility to change the standard Health Cloud roles to ones that reflect how your organization works.

[Changes to Objects and Fields](#)

To support platform encryption, we've changed which field contains the patient medical record number.

[Localize Labels on the Patient Card and Health Timeline](#)

We've given you the ability to localize the labels on the Patient Card and the Health Timeline.

EDITIONS

Health Cloud is available in Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

[Medical Record Number No Longer Required in Patient Creation Process](#)

We understand that your company might not use an MRN to track candidate patients, so the `Medical Record Number` field is no longer required to convert a candidate patient.

[Limits for Industries REST API](#)

You can retrieve a maximum of 200 records in one request instead of the 2,000 records previously documented.

[Care Plan and Timeline Get More Elbow Room](#)

We've put the Care Plan and Health Timeline on separate tabs to provide care coordinators with more space to work and to increase performance.

[Active Field Added to Timeline View Configurations Tab](#)

We've added the `Active` field to the Timeline View Configurations tab.

Secure Protected Health Information with Salesforce Shield

Take compliance, governance, and security of protected health information (PHI) data even further with Salesforce Shield.

Health Cloud now supports Salesforce Shield—helping your organization to more easily implement Health Cloud in a manner that's compliant with your policies and procedures for handling PHI. Shield is a trio of security tools that developers can use to build a new level of trust, transparency, compliance, and governance into business-critical apps. Salesforce Shield is a separately licensed set of services that includes Platform Encryption, Event Monitoring, and Field Audit Trail.

- Event Monitoring gives visibility into user actions and prevents malicious use.
- Platform encryption protects data at rest while preserving functionality like search, workflow, and validation rules.
- Field Audit Trail lets you know the state and value of your data for any date, at any time.

Multiple Languages Supported

Access Health Cloud in six new languages.

Health Cloud supports all the locales supported by the Salesforce platform and with Summer '16, we've added these additional languages.

- Dutch
- English (UK)
- French
- German
- Portuguese (Brazil)
- Spanish
- Spanish (Mexico)

If your company is multi-language and operates in a non-English language, enable the Translation Workbench so that translated values display correctly in Health Cloud components. Product documentation is available in all fully supported languages.

It's Easier to Create Lists of Patients

We've made some usability improvements to the wizard that you and your care coordinators use to create patient lists.

Now, when you select the records or fields to use in filter criteria, type a few letters in the lookup and select from a dynamic list of matching records or fields. Then, when you select a field, the new input field matches the type of data you need to enter in the field. For example, if you select a discharge date field, then a date field appears in the wizard. Or if the field you select is a picklist field type, then the picklist values appear. The following lookup types change the type of input field that appears.

- Date and date/time
- Boolean
- Picklist
- Record type

Customize the Delivered Care Team Roles

The roles that people have in the healthcare world are incredibly varied. So we've given you the flexibility to change the standard Health Cloud roles to ones that reflect how your organization works.

Your organization might be an extended care facility and call the people you manage residents rather than patients. Or instead of care coordinators, you have case managers who interact with patients. It's easy to change the text that appears throughout the app.

From Setup, enter *Custom metadata* in the **Quick Find** box, then select **Custom Metadata Types**. Clone the **Careplan Role Care Coordinator** setting or the **Careplan Role Patient** setting. Then, deactivate the original setting and make the new record active.

Changes to Objects and Fields

To support platform encryption, we've changed which field contains the patient medical record number.

We've added the custom field `MedicalRecordNumber__c` to the following objects: `Account`, `Contact`, `EhrPatient__c`, and `CandidatePatient__c`. This field replaces `SourceSystemID`, which held a patient's medical record number or other patient ID in Winter '16.

Localize Labels on the Patient Card and Health Timeline

We've given you the ability to localize the labels on the Patient Card and the Health Timeline.

Now you can localize the `Friendly Name` field on the Patient Card and the Health Timeline and the `Object Name` field on the Health Timeline. To create the label text in another language, clone the configuration record for the Patient Card or Health Timeline text. Add the label text to the `Friendly Name` or `Object Name` field using the language you want to display. Next, set the `Language` field of the new record to that language. The system displays the label text that matches the user's language setting.

Since you can't have two records with the same assigned sort order, create a different version number for the new record. For example, if the English record has `3` in the `Sort Order` field, then assign the Spanish version `3.1`.

Here's an example of the text *Medications* that appears on the Patient Card. It has an entry for both English and Spanish. When a care coordinator uses the console as a Spanish language user, *Medicamentos* appears on the Patient Card with a list of medications for that patient. Since it has a sort order of `3.1`, it appears as the third item on the patient card for that user.



Action	Object Name	Friendly Field Name	Field Name	Language	Object Name	Sort By	Sort Order	Limit	Ascending	Active
Edit Del	Related Person	Agents/Guardian/Guarantor	healthca__CalculatedNa	English (United States)	healthca__EhrRelatedP	healthca__CalculatedNa	1.0			<input checked="" type="checkbox"/>
Edit Del	Languages	Languages	healthca__Languages_c	English (United States)	healthca__EhrPatient_c	healthca__Communicas	2.0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	Medications_Spanish	Medicamentos	healthca__MedicationNa	Español	healthca__EhrMedicatio	healthca__MedicationNa	3.0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del	Medications_English	Medications	healthca__MedicationNa	English (United States)	healthca__EhrMedicatio	healthca__MedicationNa	3.1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Note: If you don't see the `Language` or `Language Code` fields on the tab, add the fields to the related page layout and refresh the tab.

Medical Record Number No Longer Required in Patient Creation Process

We understand that your company might not use an MRN to track candidate patients, so the `Medical Record Number` field is no longer required to convert a candidate patient.

However, Salesforce uses the `MedicalRecordNumber__c` and `SourceSystem__c` fields to check for duplicate patient records during the patient creation process. You can create a validation rule to verify that all candidate patient records have values in these fields before converting candidate patient records.

Limits for Industries REST API

You can retrieve a maximum of 200 records in one request instead of the 2,000 records previously documented.

Care Plan and Timeline Get More Elbow Room

We've put the Care Plan and Health Timeline on separate tabs to provide care coordinators with more space to work and to increase performance.

The screenshot displays the Salesforce Health Cloud interface for a patient named Charles Green. The patient card is shown with a sidebar containing personal and medical information. The main area has four tabs: Details, Timeline, Care Plan, and Collaboration. The Timeline tab is selected, showing a list of health events such as 'Essential hypert...', 'Sensorineural he...', 'Rheumatoid arthr...', and 'Moderate chronic...'. Below the list is a timeline graph. The Care Plan tab is also visible, showing a list of problems and goals with severity levels: 'Chronic obstructive pulmonary disease' (HIGH), 'Blood Glucose Control' (HIGH), 'Basic self-care for diabetes' (MEDIUM), 'Control hypertension' (MEDIUM), 'Basic diabetes self-care needed' (MEDIUM), 'Shortness of breath' (LOW), and 'Fluid retention' (LOW).

Note: Existing Health Cloud orgs still show the Care Plan and Timeline option in the New Tab on Patient picklist on the patient card. Remove the menu item by deleting the Care Plan and Timeline category name from the CardView Dropdown custom setting.

SEE ALSO:

[Add Items to the Patient Card Navigation Menu](#)

Active Field Added to Timeline View Configurations Tab

We've added the `Active` field to the Timeline View Configurations tab.

Use this field to control whether a specific customization appears on the Health Timeline. Previously, admins had to delete a configuration record to ensure that it no longer appeared on the timeline. Make sure to add this field to the Timeline View Configuration page layout.

Sales: Contacts, Notes, Microsoft® Integration, and More

Help marketing and sales teams drive more business to your company. Get sales reps to zero in on activity that needs their attention. And help your sales teams increase their sales productivity in Lightning Experience.

IN THIS SECTION:

[Salesforce Editions: Optimized for the Sales Cloud](#)

Feature availability has changed. Find out what's new.

[Core Sales Features: Help Reps Sell Using Lightning Experience](#)

Give your sales reps access to better tools for selling.

[Productivity Features: Help Sales Reps Do More with Lightning Experience](#)

Get your reps to spend time wisely on the things that help them keep their deals moving. Create custom Home pages for different profiles, use more email features, and create calendars for standard or custom objects to help reps stay focused on the important things for closing deals fast.

[Microsoft® Integration: Sync and Work Between Microsoft Systems and Salesforce](#)

Save your sales reps time when you set up their systems to sync contacts, events, and tasks between Microsoft email systems and Salesforce. And help your reps create and work with Salesforce records directly in Outlook®.

[Data Quality: View a Data.com Data Assessment in Lightning Experience](#)

Do you really know if your account data meets your needs? Do you want to find out how good it really is? Knowledge is power, and Data.com's Data Assessment gives you all the details to make an informed decision about your account data quality.

[Other Changes in the Sales Cloud](#)

Learn about other changes we've made to improve usability.

Salesforce Editions: Optimized for the Sales Cloud

Feature availability has changed. Find out what's new.

See [Salesforce Editions Optimized for the Sales and Service Clouds](#).

EDITIONS

Available in: **Professional, Enterprise, and Unlimited** Editions

Core Sales Features: Help Reps Sell Using Lightning Experience

Give your sales reps access to better tools for selling.

IN THIS SECTION:

[Contacts: Associate a Contact with Multiple Accounts \(Generally Available\)](#)

Contacts to Multiple Accounts lets your sales reps easily manage the relationships between people and businesses without creating duplicate records. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

EDITIONS

Available in Lightning Experience in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

[Opportunities: Track and Manage Your Deals](#)

Set up opportunity teams directly within Lightning Experience, and see news and other insights on opportunities.

[Accounts: Store Information About the People and Business You Work With](#)

Account teams are now available in Lightning Experience. Plus, your accounts just got a whole lot smarter thanks to autofill and logos. And the arrival of the News app means you can find all account insights in one easy-to-find place.

[Opportunity Products: Find Products with Ease in Lightning Experience](#)

Your sales reps can add products to your opportunities more quickly with most recently used products suggestions and autofill search. Enhancements to product search will be available two weeks after release. This feature is available in the Salesforce Lightning Experience.

Contacts: Associate a Contact with Multiple Accounts (Generally Available)

Contacts to Multiple Accounts lets your sales reps easily manage the relationships between people and businesses without creating duplicate records. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

Contacts to Multiple Accounts lets reps associate a single contact with multiple accounts. Every contact needs to be associated with a primary account (the account that appears in `Account Name`). And now, your reps can associate more accounts with each contact. The primary account represents a *direct* relationship; the other accounts associated with a contact represent *indirect* relationships.

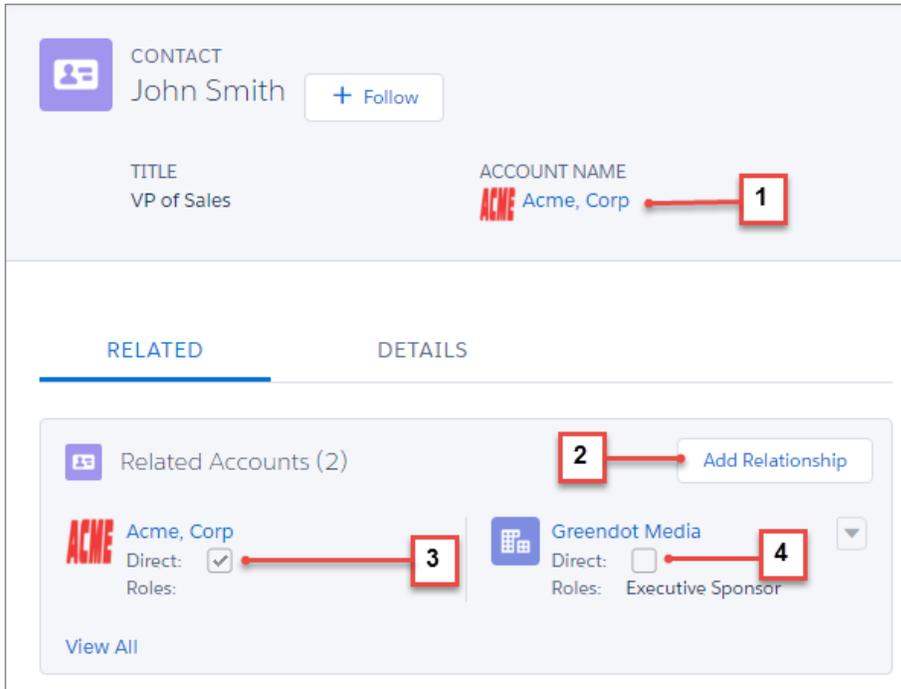
Contacts to Multiple Accounts introduces two new related lists to help your reps track and manage account-contact relationships. On contact records, the Related Accounts related list includes the one directly related account and all the indirectly related accounts. On account records, the Related Contacts related list includes the direct and indirect contacts. Reps can add and modify relationships from these related lists.



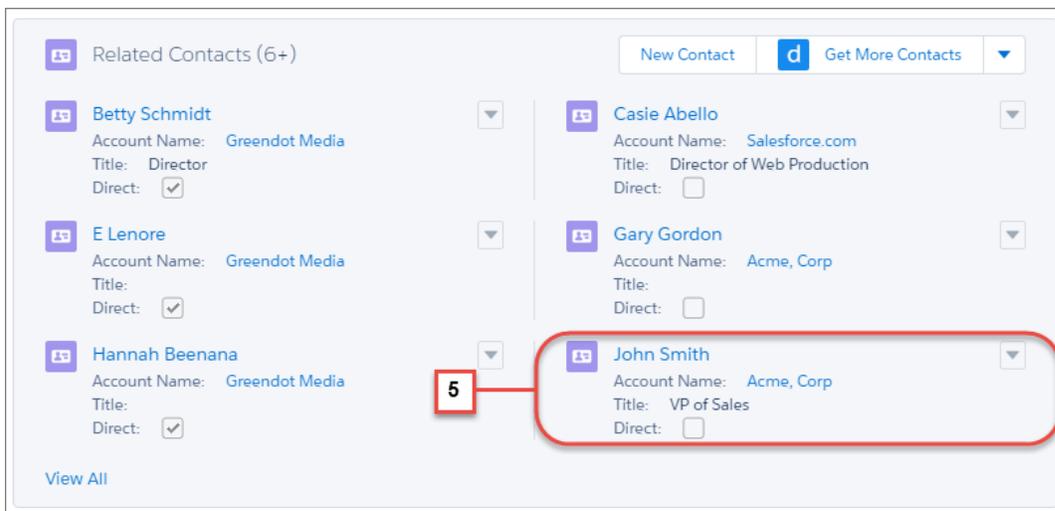
Example: John Smith is a vice president at Acme Corporations, and Acme is the account on his contact record (1). But John is also involved with the nonprofit organization Greendot Media. By adding Greendot Media as a related account on John's contact record (2), reps can track this other relationship. John is considered a direct contact to Acme because Acme is the account on his contact record (3). And he's considered an indirect contact to Greendot Media and any other accounts that he becomes related to (4).

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited** Editions



John also appears as a related contact on the Greendot Media account record and any other accounts that he's indirectly related to (5).



SEE ALSO:

[Let Users Relate a Contact to Multiple Accounts](#)

[Salesforce Help: Create Custom Report Types for Account Contact Relationships](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Link a Single Contact to Multiple Accounts](#)

Let Users Relate a Contact to Multiple Accounts

Enable Contacts to Multiple Accounts, modify page layouts, and customize your related lists so your sales reps can easily track relationships between people and the businesses they work with.

If you disable Contacts to Multiple Accounts, keep in mind that doing so deletes all indirect account-contact relationships. Associations between a contact and its primary account remain.

1. From Setup, enter *Account Settings* in the *Quick Find* box, then select **Account Settings**.

2. Select **Allow users to relate a contact to multiple accounts**.

3. Add the Related Contacts related list to the account page layouts that your reps use.

Because the Related Contacts related list includes all direct contacts, you can remove the Contacts related list from your account page layouts.

 **Tip:** Easily see who's a direct contact for the account when you add the *Direct* field to the Related Contacts related list.

4. Add the Related Accounts related list to the contact page layouts your reps use.

 **Tip:** Easily see which account is the contact's primary account when you add the *Direct* field to the Related Accounts related list.

5. Decide whether you want to prevent activities from automatically rolling up to a contact's primary account. If so, from Setup, go to the Activities Setting page and deselect **Roll up activities to a contact's primary account**.

6. If you want to look at the relationships between contacts and accounts, create custom report types.

SEE ALSO:

[Salesforce Help: Considerations for Changing How Activities Roll Up to Accounts \(can be outdated or unavailable during release preview\)](#)

Opportunities: Track and Manage Your Deals

Set up opportunity teams directly within Lightning Experience, and see news and other insights on opportunities.

IN THIS SECTION:

[Team Up to Sell More with Opportunity Teams in Lightning Experience](#)

Your reps can improve the efficiency of sales teams by adding opportunity teams to their opportunities. Team roles show who's who on the team, and help the team coordinate to sell more. The opportunity owner can grant opportunity team members on opportunities teams special access to records related to the opportunity. Previously, you had to switch back to Salesforce Classic to enable opportunity teams or set up team roles. Now, you can access settings for opportunity teams without leaving Lightning Experience.

[Add Default Opportunity Teams in Lightning Experience](#)

Your reps can add a default opportunity team to opportunities with the click of a single button without leaving Lightning Experience. The opportunity owner or someone above the owner in the hierarchy adds the opportunity owner's default opportunity team by clicking **Add Default Team** on the opportunity team related list in Lightning Experience, Salesforce Classic, or the Salesforce1 mobile app.

USER PERMISSIONS

To enable Contacts to Multiple Accounts:

- "Customize Application"

To view page layouts:

- "View Setup"

To edit page layouts:

- "Customize Application"

[See Up-to-Date News on Opportunities with Insights](#)

Give your sales reps instant access to the latest news directly from their opportunities. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

Team Up to Sell More with Opportunity Teams in Lightning Experience

Your reps can improve the efficiency of sales teams by adding opportunity teams to their opportunities. Team roles show who's who on the team, and help the team coordinate to sell more. The opportunity owner can grant opportunity team members on opportunities teams special access to records related to the opportunity. Previously, you had to switch back to Salesforce Classic to enable opportunity teams or set up team roles. Now, you can access settings for opportunity teams without leaving Lightning Experience.

A team member is added to an opportunity with a specific role, and the member's level of access to the opportunity and its related records can be adjusted. For example, the opportunity owner might include a sales engineer working on the opportunity, and give the sales engineer access to update opportunity information. Edit the list of available roles in Setup.

TEAM MEMBER	MEMBER ROLE	TITLE
Ian Schoen	Sales Engineer	Sales Representative I
Erin Tidwell	Sales Rep	Sales Lead
George Hart	Sales Manager	Associate Manager

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

[Salesforce Help: Managing Opportunity Teams \(can be outdated or unavailable during release preview\)](#)

Add Default Opportunity Teams in Lightning Experience

Your reps can add a default opportunity team to opportunities with the click of a single button without leaving Lightning Experience. The opportunity owner or someone above the owner in the hierarchy adds the opportunity owner's default opportunity team by clicking **Add Default Team** on the opportunity team related list in Lightning Experience, Salesforce Classic, or the Salesforce1 mobile app.

Each user defines a default opportunity team in their personal settings.

USER PERMISSIONS

To enable opportunity teams:

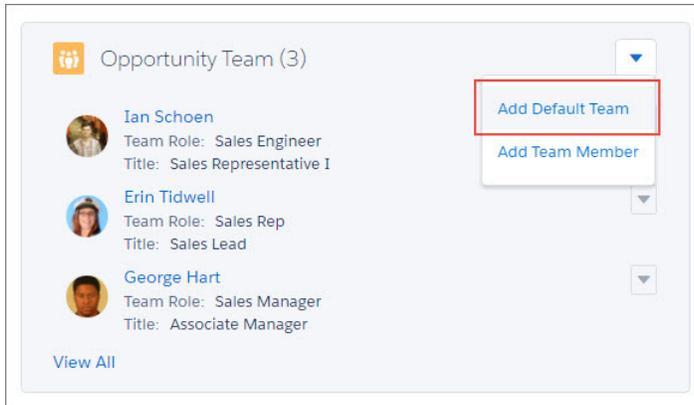
- “Customize Application”

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

[Salesforce Help: Guidelines for Setting Up and Adding a Default Opportunity Team \(can be outdated or unavailable during release preview\)](#)

See Up-to-Date News on Opportunities with Insights

Give your sales reps instant access to the latest news directly from their opportunities. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

Insights are relevant, timely news articles and Twitter posts that help keep your sales reps informed about the companies that matter most to them. The insights on opportunities are based on the account that's associated with the opportunity and are selected using that same criteria that's used when selecting insights for accounts.

To see insights on opportunities, turn on Account Insights from the Account Settings page. Then add the Insights component to your opportunity page layouts.

USER PERMISSIONS

To enable Account Insights on opportunities:

- "Customize Application"

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

SEE ALSO:

[Find All News with One Click with the News App](#)

[Salesforce Help: Account Insights \(can be outdated or unavailable during release preview\)](#)

Accounts: Store Information About the People and Business You Work With

Account teams are now available in Lightning Experience. Plus, your accounts just got a whole lot smarter thanks to autofill and logos. And the arrival of the News app means you can find all account insights in one easy-to-find place.

IN THIS SECTION:

[Team Up to Work Accounts in Lightning Experience](#)

Your sales reps can coordinate and simplify a sales team's access to accounts by setting up an account team in Lightning Experience. Account team members have increased access to the account and its related records. Previously, account teams were only available in Salesforce Classic. This feature is available in the Salesforce Lightning Experience.

[Create New Accounts Lightning Fast with Account Autofill](#)

Creating new accounts just got quicker than ever. When reps start typing a company in the `Account Name` field, we'll offer up suggestions. Less time entering data—what's not to love? This feature is available in Lightning Experience only.

[Visualize Your Business Like Never Before with Account Logos \(Beta\)](#)

They say a picture is worth a thousand words, but there's just one word to describe the fact company logos are now shown on account records—awesome. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

[Find All News with One Click with the News App](#)

The News app is a one-stop shop where your users can quickly catch up on the latest happenings about the companies and industries that matter most to them. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

Team Up to Work Accounts in Lightning Experience

Your sales reps can coordinate and simplify a sales team's access to accounts by setting up an account team in Lightning Experience. Account team members have increased access to the account and its related records. Previously, account teams were only available in Salesforce Classic. This feature is available in the Salesforce Lightning Experience.

A team member is added to an account with a specific role. The member's level of access to the account and its related records can be adjusted. For example, the account owner could include a sales rep who frequently works on the account, and give the rep access to update account information. Edit the list of available roles in Setup.

TEAM MEMBER ↓	TEAM ROLE	TITLE
Victoria Lyon	Executive Sponsor	Senior Manager
Jeffrey Su	Account Manager	Sales Representative II
Ian Schoen	Sales Rep	Sales Representative I

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

[Salesforce Help: Managing Account Teams \(can be outdated or unavailable during release preview\)](#)

Create New Accounts Lightning Fast with Account Autofill

Creating new accounts just got quicker than ever. When reps start typing a company in the `Account Name` field, we'll offer up suggestions. Less time entering data—what's not to love? This feature is available in Lightning Experience only.

But wait, there's more! When a rep selects a company from the list, we autofill several other fields with data, when available: Website, Phone, and Billing Address (headquarter location). The suggestions include US-based companies.

USER PERMISSIONS

To enable account teams:

- "Customize Application"

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Account Autofill:

- "Customize Application"

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The screenshot shows the 'Create Account' form with the following fields and values:

- Account Owner:** Madison Rigsby
- * Account Name:** Salesforce.com
- Parent Account:** Search Accounts
- Billing Address:**
 - Street: 1 Market St
 - City: San Francisco
 - State: California
 - Zip/Postal Code: 94105-1402
 - Country: United States
- Phone:** 1-415-901-7000
- Website:** http://salesforce.com

The dropdown menu for Account Name shows the following suggestions:

- Sal** (selected)
- Salesforce.com** (San Francisco, California salesforce.com)
- Salvation Army** (phoenixsalvationarmy.com)
- Sally Beauty Supply** (Denton, Texas sallybeauty.com)
- Salvation Army Svc Ctr** (salvationarmycitruscounty.com)
- Sales** (freemansales.com)

Turn on autofill from the Account Settings page. While you're at it, [turn on account logos](#), too, so reps see company logos with the suggestions.

Visualize Your Business Like Never Before with Account Logos (Beta)

They say a picture is worth a thousand words, but there's just one word to describe the fact company logos are now shown on account records—awesome. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

 **Note:** This release contains a beta version of Account Logos that is production quality but has known limitations.

From Account Settings, select the option to allow logos. Voilà! Logos show up automatically, when available, on US-based accounts. If you use Social Accounts, logos that reps added manually from social networks may be replaced with a fresher, more up-to-date logo.

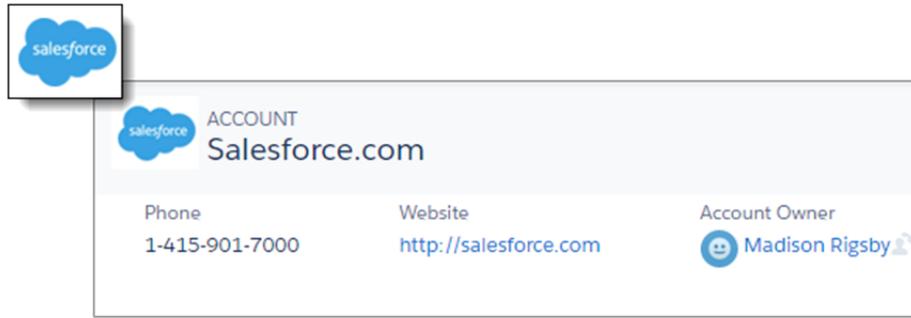
USER PERMISSIONS

To enable Account Logos:

- "Customize Application"

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



Bonus: If you've enabled [account autofill](#), reps see logos with the list of suggested companies.

If you're not completely satisfied with a logo, for any reason, contact Salesforce Customer Support to remove the logo from the account.

Find All News with One Click with the News App

The News app is a one-stop shop where your users can quickly catch up on the latest happenings about the companies and industries that matter most to them. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

The insights shown on the News app are selected based on recently viewed accounts and opportunities, and on tasks and events for those accounts—which is the same criteria used to select insights for the Lightning Home page. But, unlike the Home page, the News app is all news, all the time.

As you navigate to other records, more insights may become available. Click **See All News** to get the very latest.

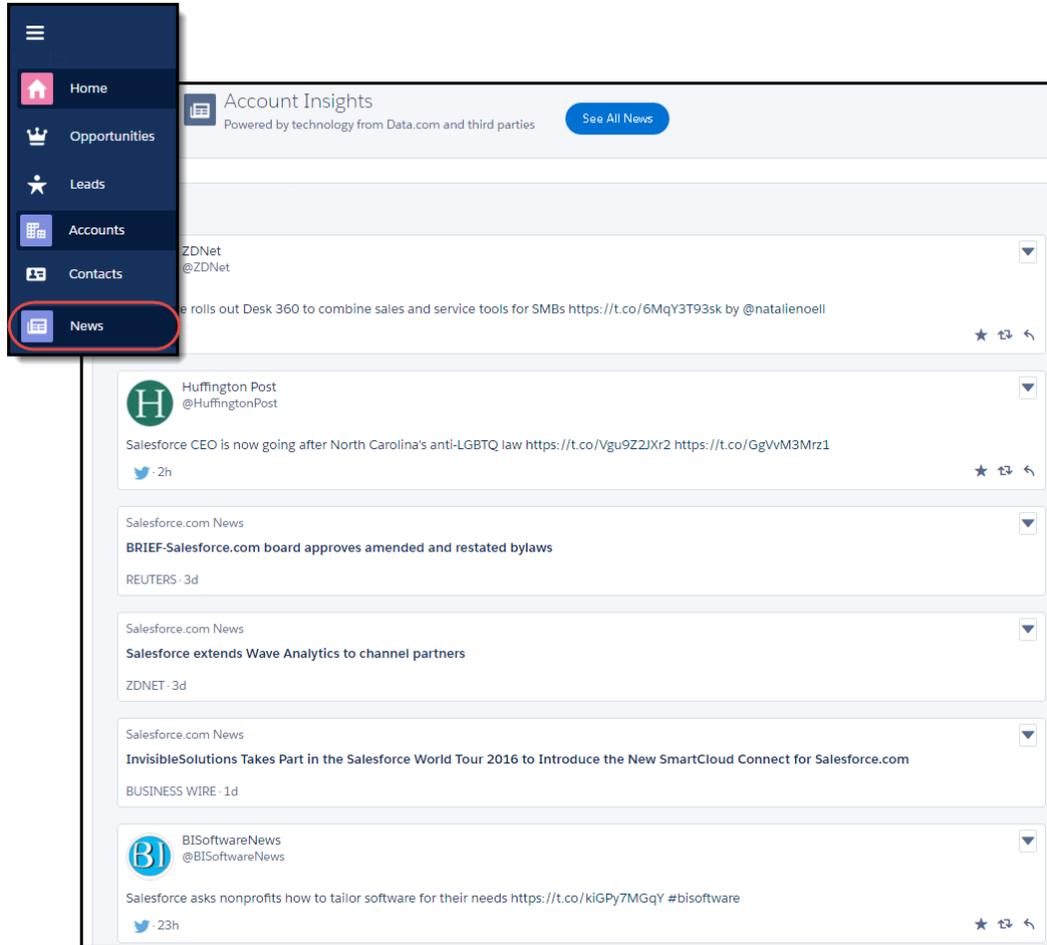
USER PERMISSIONS

To enable Account Insights:

- "Customize Application"

EDITIONS

Available in: **Group**,
Professional, **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions



If you don't see the News app, go to the Account Settings page in Setup and enable Account Insights.

SEE ALSO:

[See Up-to-Date News on Opportunities with Insights](#)

[Salesforce Help: Account Insights \(can be outdated or unavailable during release preview\)](#)

Opportunity Products: Find Products with Ease in Lightning Experience

Your sales reps can add products to your opportunities more quickly with most recently used products suggestions and autofill search. Enhancements to product search will be available two weeks after release. This feature is available in the Salesforce Lightning Experience.

Now when sales reps select **Add Product** on the Products related list, they see a list of up to five products in the current pricebook that they've recently added to other opportunities. It's a real time saver for anyone who works frequently with the same small set of products.

If the recently used products aren't what they want, reps can enter a product name and see search results instantly.

EDITIONS

Available in all editions

Note that products that appear on the opportunity can be sorted by any field except List Price or Product name.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Productivity Features: Help Sales Reps Do More with Lightning Experience

Get your reps to spend time wisely on the things that help them keep their deals moving. Create custom Home pages for different profiles, use more email features, and create calendars for standard or custom objects to help reps stay focused on the important things for closing deals fast.

IN THIS SECTION:

[Home: Customize Home for Different User Profiles \(Generally Available\)](#)

You asked for it, and we've delivered! Use the Lightning App Builder to create custom Home pages that appear for different profiles in your org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records! This feature is available in Lightning Experience only.

[Lightning Voice: Make and Receive Phone Calls Right from Salesforce \(Generally Available\)](#)

Use phone features without ever leaving Salesforce! Your sales reps can now make and receive calls, add call notes, and log their call information with ease. It just takes a single click from phone number fields in Lightning Experience, such as numbers on contacts, leads, and list views. This feature is available in Lightning Experience only.

[Email: Send Email through Gmail™ or Office 365™, Enhanced Email](#)

Does your company primarily send email using Gmail or Office 365? Enable Send through Gmail or Send through Office 365 and let users opt in by connecting their own accounts. Enhanced Email improves your team's email in Salesforce with a ton of new functionality to better drive your business processes, including custom fields, customized layouts, and an improved email detail page.

[Notes: Share Notes with Users and Groups and Add Meaning with Rich Text](#)

Your users can now share their notes with co-workers and add meaning with rich text. This feature is available in both Lightning Experience and Salesforce Classic.

[Activities: Keep Up with the Speed of Business in Lightning Experience](#)

A way of creating calendars based on Salesforce objects helps all your users keep better tabs on important dates. Improvements in the activity timeline and the task list make sales reps more effective.

[List Views: Target Relevant Data with List View Enhancements for Lightning Experience](#)

With the addition of filter logic, enhanced list view display and controls, and auto-complete search in Lightning Experience, sales and service professionals can take advantage of powerful ways to zero in on relevant data.

Home: Customize Home for Different User Profiles (Generally Available)

You asked for it, and we've delivered! Use the Lightning App Builder to create custom Home pages that appear for different profiles in your org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records! This feature is available in Lightning Experience only.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Create and Edit Lightning Experience Home Pages](#)

Maximize the relevance of the Home page for different types of users. Don't need the performance chart or Top Deals for your service reps? Then assign them a different Home page that shows new cases and top pain points. Customize the default Home page, and assign custom pages for different profiles. This feature is available in Lightning Experience only.

[Set a New Default Home Page](#)

Set a new default Home page to surface the information that's most relevant for your users. All users see the default Home page unless they have profiles that are assigned to another Home page. This feature is available in Lightning Experience only.

[Assign Custom Home Pages to Specific Profiles](#)

Do you have different types of users that need access to different things on their respective Home pages? Of course you do! Assign pages to different profiles to give your users access to a Home page perfect for their role. This feature is available in Lightning Experience only.

SEE ALSO:

[Lightning App Builder](#)[Lightning Experience Features in This Release](#)[Lightning Experience: A Modern and Intelligent User Experience](#)

Create and Edit Lightning Experience Home Pages

Maximize the relevance of the Home page for different types of users. Don't need the performance chart or Top Deals for your service reps? Then assign them a different Home page that shows new cases and top pain points. Customize the default Home page, and assign custom pages for different profiles. This feature is available in Lightning Experience only.

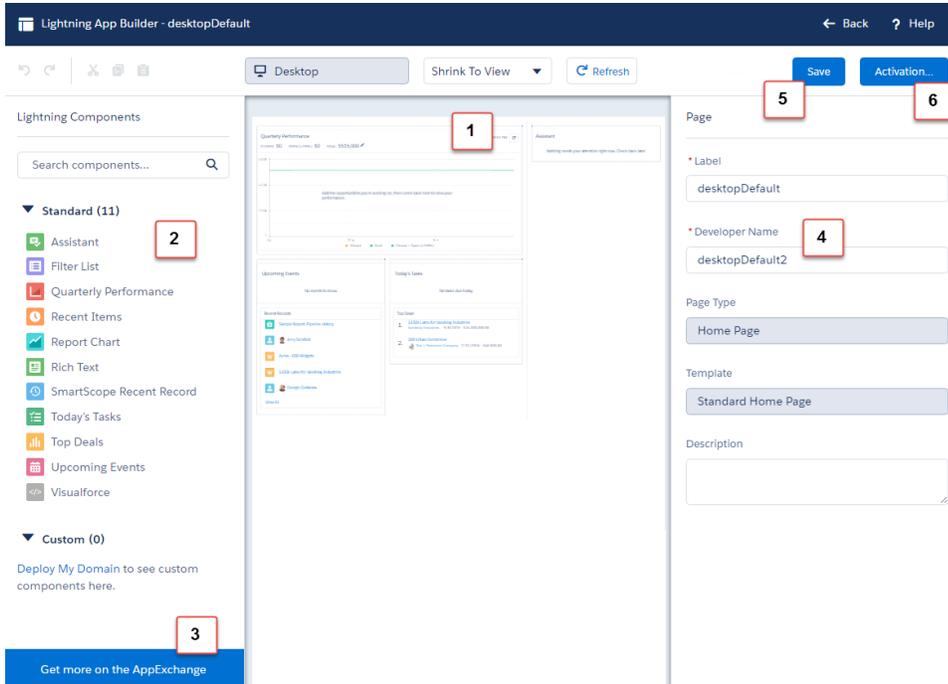
USER PERMISSIONS

To create and save Lightning Pages in the Lightning App Builder

- "Customize Application"

To view Lightning Pages in the Lightning App Builder

- "View Setup"



For more information, see [Lightning App Builder](#).

SEE ALSO:

- [Home: Customize Home for Different User Profiles \(Generally Available\)](#)
- [Set a New Default Home Page](#)
- [Assign Custom Home Pages to Specific Profiles](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Set a New Default Home Page

Set a new default Home page to surface the information that's most relevant for your users. All users see the default Home page unless they have profiles that are assigned to another Home page. This feature is available in Lightning Experience only.

You can set the default home page in two places.

- **Lightning App Builder**—From Setup, enter *Lightning App Builder* in the **Quick Find** box, then select **Lightning App Builder**.
After you save a page, click **Activate** from the Page Saved dialog, or click **Activation** later.
- **Home in Setup**—From Setup, enter *Home* in the **Quick Find** box, then select **Home**.

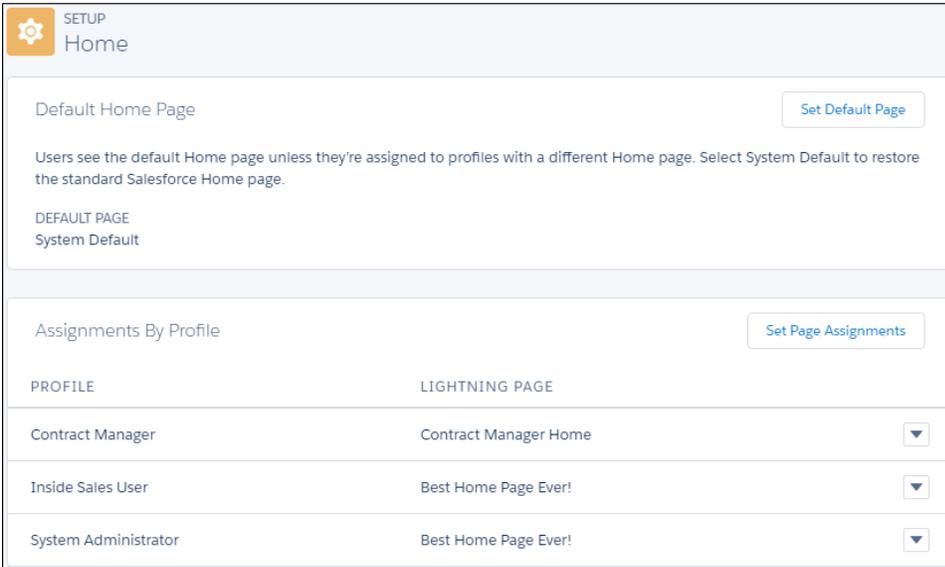
USER PERMISSIONS

To create and save Lightning Pages in the Lightning App Builder

- "Customize Application"

To view Lightning Pages in the Lightning App Builder

- "View Setup"



Click **Set Default Page** and select a page. Select System Default to restore the standard Home page.

SEE ALSO:

- [Home: Customize Home for Different User Profiles \(Generally Available\)](#)
- [Create and Edit Lightning Experience Home Pages](#)
- [Assign Custom Home Pages to Specific Profiles](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Assign Custom Home Pages to Specific Profiles

Do you have different types of users that need access to different things on their respective Home pages? Of course you do! Assign pages to different profiles to give your users access to a Home page perfect for their role. This feature is available in Lightning Experience only.

You can set page assignments by profile in two places. You can use the Lightning App Builder to assign profiles to a single Home page, but Home in Setup offers more control over page assignments.

- Lightning App Builder—From Setup, enter *Lightning App Builder* in the Quick Find box, then select **Lightning App Builder**. After you save a page, click **Activate** from the Page Saved dialog, or click **Activation** and select **Assign this Home page to specific profiles**.
- Home in Setup—From Setup, enter *Home* in the Quick Find box, then select **Home**. Then click **Set Page Assignments**. You can also click next to a profile and select **Change Assignment**.

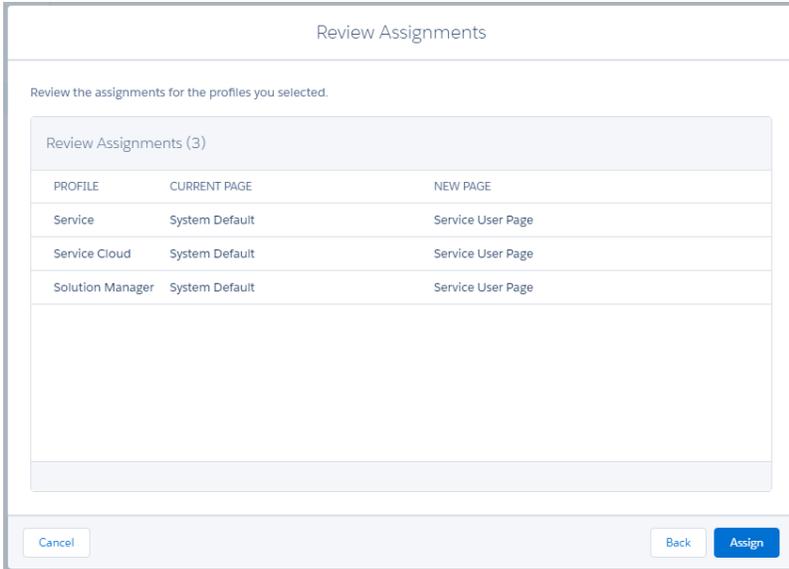
USER PERMISSIONS

To create and save Lightning Pages in the Lightning App Builder

- “Customize Application”

To view Lightning Pages in the Lightning App Builder

- “View Setup”



SEE ALSO:

[Home: Customize Home for Different User Profiles \(Generally Available\)](#)

[Create and Edit Lightning Experience Home Pages](#)

[Set a New Default Home Page](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

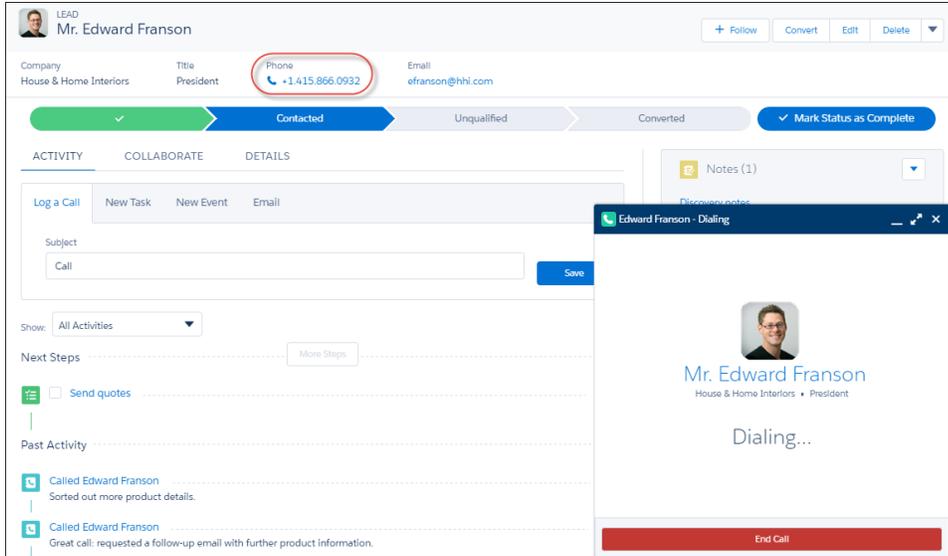
Lightning Voice: Make and Receive Phone Calls Right from Salesforce (Generally Available)

Use phone features without ever leaving Salesforce! Your sales reps can now make and receive calls, add call notes, and log their call information with ease. It just takes a single click from phone number fields in Lightning Experience, such as numbers on contacts, leads, and list views. This feature is available in Lightning Experience only.

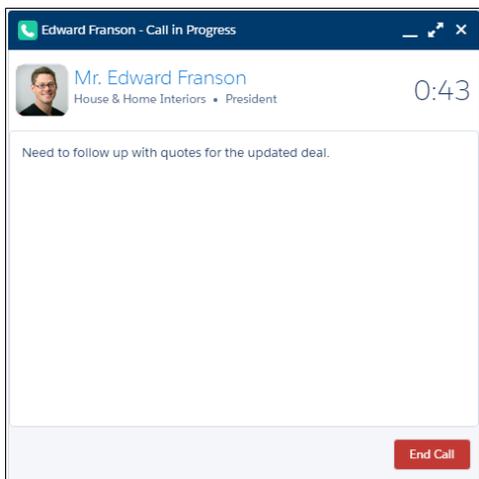
 **Note:** For now, we support outgoing calls to the U.S. and Canada only.

EDITIONS

Voice is available for an additional cost in **Professional, Enterprise, Performance, and Unlimited** Editions



The call appears in a composer window, so your sales reps can multitask while they're on a call. They can access relevant records, add call notes directly in the composer window, or create tasks, events, or other records related to the call.



Reps can also add more details after a call has ended, and the call details are logged in the activity timeline.

Optionally, your sales reps can also receive calls with Voice. Incoming calls show a list of related activities, so users have access to relevant information before they've even answered the call.

IN THIS SECTION:

[Set Up Voice Features](#)

Once you've purchased Voice licenses, activate Voice and assign the permissions to different users. This feature is available in Lightning Experience only.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Set Up Voice Features

Once you've purchased Voice licenses, activate Voice and assign the permissions to different users. This feature is available in Lightning Experience only.

1. Make sure that your environment supports Voice.
2. Enable Voice in your org.
3. Create a permission set that includes Voice features.
4. Assign the permission set to users.

For more information, see “Set Up Voice” in the Salesforce Help.

After you've implemented Voice, your sales reps can each select a Voice number from the **My Voice Settings** page in their personal settings. Each license is allowed one dedicated number. For more information, see “Assign a Voice Number” in the Salesforce Help.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Email: Send Email through Gmail™ or Office 365™, Enhanced Email

Does your company primarily send email using Gmail or Office 365? Enable Send through Gmail or Send through Office 365 and let users opt in by connecting their own accounts. Enhanced Email improves your team's email in Salesforce with a ton of new functionality to better drive your business processes, including custom fields, customized layouts, and an improved email detail page.

IN THIS SECTION:

[Let Your Users Send Email Through Gmail or Office 365](#)

Streamline email correspondence by letting your users connect their Gmail or Office 365 account to Salesforce. Then, any emails they send from Salesforce go through Gmail or Office 365. That means recipients see emails that come from your users' addresses and not from a Salesforce address. Email deliverability and compliance are also automatically handled by Gmail or Office 365. This feature is available in Lightning Experience only.

[Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#)

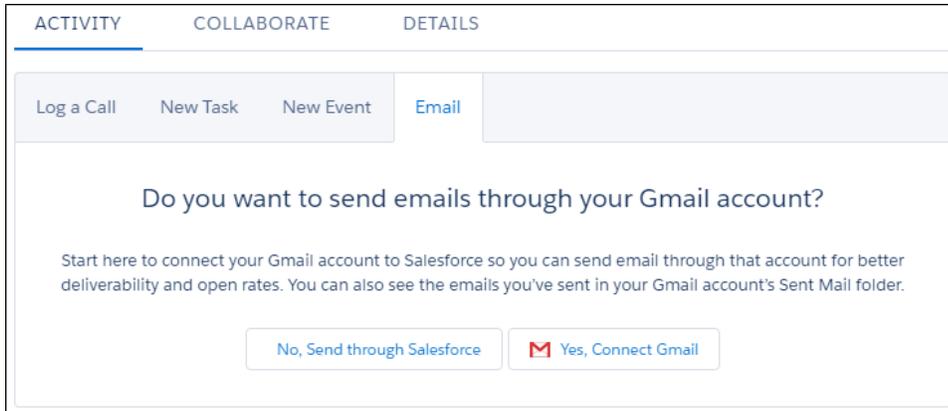
With our new Enhanced Email, you and your users can better support your specific business needs with new functionality, including custom fields, customized layouts, and the ability to relate emails to other records. You also get a new and improved email detail page that shows emails in their original format. This feature is available in both Lightning Experience and Salesforce Classic.

Let Your Users Send Email Through Gmail or Office 365

Streamline email correspondence by letting your users connect their Gmail or Office 365 account to Salesforce. Then, any emails they send from Salesforce go through Gmail or Office 365. That means recipients see emails that come from your users' addresses and not from a Salesforce address. Email deliverability and compliance are also automatically handled by Gmail or Office 365. This feature is available in Lightning Experience only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions



To enable this feature, from Setup, enter *Send through External Email Services* in the Quick Find box, then select **Send through External Email Services**.

You can allow your org to send through either Gmail or Office 365; you can't select both.

This feature is enabled for all users with the standard user profile or with the "Send Email through External Email Services" user permission.

When your users send emails using the Lightning Experience email composer, the emails go through Gmail or Office 365 using the OAuth industry standard. User credentials aren't stored within Salesforce.

Users can manage their email configuration from **My Email Settings** within their personal settings. The **My Email Settings** page gives users the option to send through their external account, and customize the name and signature that appears on outgoing emails.

My Email Settings

Outgoing Email Settings

How would you like to send your Emails?
 Send Through Office 365 Salesforce

How would you like your name to appear on your outgoing email?
 Email Name

This signature will be added to your outgoing emails (1333 characters max):
 Email Signature

Subscriptions

Send Apex Warning Emails
 Receive the Salesforce newsletter
 Receive the Salesforce administrator newsletter

Emails sent through workflows and triggers are still sent through Salesforce. Also, bounce management isn't supported when you send through external email accounts.

If you send email through Gmail or Office 365, Transport Layer Security (TLS) is handled through the external email service and not through Salesforce settings. Also, email delivery information for Send through Gmail or Office 365 is not available in the email logs. Email logs should be obtained from Gmail or Office 365 instead.

For more information about different email solutions, see [Which Email Setup is Best for My Org?](#)

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page

With our new Enhanced Email, you and your users can better support your specific business needs with new functionality, including custom fields, customized layouts, and the ability to relate emails to other records. You also get a new and improved email detail page that shows emails in their original format. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Tailor Email to Support Your Business's Needs](#)

With Enhanced Email, you and your users get a host of features that powers email to work for your business, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case. This feature is available in both Lightning Experience and Salesforce Classic.

[Get a Better Email Detail Page that Shows What Users Expect](#)

After enabling Enhanced Email, the email detail page shows emails in their original format like users expect from email apps like Gmail. This feature is available in both Lightning Experience and Salesforce Classic.

Tailor Email to Support Your Business's Needs

With Enhanced Email, you and your users get a host of features that powers email to work for your business, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case. This feature is available in both Lightning Experience and Salesforce Classic.

Remember when emails in Salesforce were just saved as tasks? It was pretty convenient, but it wasn't great for customizing and viewing emails.

Womp womp.

Well, the times they are a-changin'!

With Enhanced Email, emails sent from Salesforce are saved as EmailMessage records. EmailMessage isn't a new object, but we've beefed it up to give you more bang for your buck. EmailMessage is a standard Salesforce object, so you get all the usual goodies you have with other standard objects.

You can:

- Customize the page layout for email messages
- Use the Salesforce API to manage emails
- Set up triggers based on emails
- Add custom fields to emails

Your reps can:

- Relate emails to contacts, leads, accounts, opportunities, cases, campaigns, person accounts, and other records.
- [View emails in their original format like they've come to expect](#)

You might be wondering: I have a bunch of stuff configured to handle emails as tasks, so what do I do? Well, for backwards compatibility, we still create a Task record for each email. However, when your reps view emails in Salesforce, they see the EmailMessage record. That's a good thing, because it shows emails in their original format. So, HTML emails show the HTML format, and plain text emails show plain text format. That's what your users expect.

 **Note:** If you use Email-to-Case, see [Enhanced Email Enabled by Default](#) before enabling the feature.

IN THIS SECTION:

[Considerations for Setting Up Enhanced Email](#)

Consider a few tidbits of wisdom before using Enhanced Email, including limitations, details for Email-to-Case customers, and information about working with EmailMessage and Task records.

[Enhanced Email Enabled by Default](#)

Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case. If you use Email-to-Case and you're ready to enable Enhanced Email, use these steps. This feature is available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#)

[Get a Better Email Detail Page that Shows What Users Expect](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Considerations for Setting Up Enhanced Email

Consider a few tidbits of wisdom before using Enhanced Email, including limitations, details for Email-to-Case customers, and information about working with EmailMessage and Task records.

- Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case.
- If you use Email-to-Case, you can already use custom fields, workflows, and triggers with emails without enabling Enhanced Email. If you want to store emails using the EmailMessage object and relate them to other objects, then enable Enhanced Email.
- With Enhanced Email, emails sent from Salesforce are saved as both EmailMessage records and Task records. However, only the EmailMessage record is shown on the email detail page in the UI.
- Even if your organization uses Enhanced Email, emails added from Web-to-Lead, Salesforce for Outlook, and Lightning for Outlook will still be just stored as Task records.
- You can't use custom currency fields with the EmailMessage object.
- EmailMessage records can have only one record type.
- Workflow rules can use EmailMessage records only to update fields on Case records.
- Before using Enhanced Email, you should:
 - Review triggers and workflow rules that use the EmailMessage object. For EmailMessage records associated with cases, the `ParentID` field is always populated. With Enhanced Email, EmailMessage records may be associated with other records and the `ParentID` field may be blank. As a result, you may need to update your triggers and workflow rules to handle email messages with a blank `ParentID` field.
 - Review custom business logic that incorporates tasks and emails. You should:
 - Recreate any custom Task object fields on the EmailMessage object.
 - Migrate any Task object triggers to the EmailMessage object.
 - Test it in a sandbox with any workflows and customizations, including Email-to-Case customizations.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

SEE ALSO:

[Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#)

[Enhanced Email Enabled by Default](#)

Enhanced Email Enabled by Default

Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case. If you use Email-to-Case and you're ready to enable Enhanced Email, use these steps. This feature is available in both Lightning Experience and Salesforce Classic.

1. From Setup, enter *Enhanced Email* in the Quick Find box, then select **Enhanced Email**.
2. Click **Enable**.
3. Update the Email Message page layout to:
 - a. Add the `Related To` field.
Then, your users can see which records are related to an email.
 - b. Remove the `Parent Case` field from the Email Message page layout. This field is generally blank unless you use Email-to-Case and an email is associated with a case.

USER PERMISSIONS

To enable or disable Enhanced Email

- "Customize Application"

SEE ALSO:

- [Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#)
- [Considerations for Setting Up Enhanced Email](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Get a Better Email Detail Page that Shows What Users Expect

After enabling Enhanced Email, the email detail page shows emails in their original format like users expect from email apps like Gmail. This feature is available in both Lightning Experience and Salesforce Classic.

In Lightning Experience, the detail page displays the email (1), with any custom fields you add. The page also includes related lists for sender and recipients (2), attachments (3), and the related opportunity, campaign, case, account, or person account (4).

SEE ALSO:

- [Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#)
- [Considerations for Setting Up Enhanced Email](#)
- [Enhanced Email Enabled by Default](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Notes: Share Notes with Users and Groups and Add Meaning with Rich Text

Your users can now share their notes with co-workers and add meaning with rich text. This feature is available in both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Share Notes with Other Users or Groups](#)

Sales users can now collaborate more easily by sharing notes with their teammates or Chatter groups. Recipients of a shared note can view notes but not edit them. This feature is available in both Lightning Experience and Salesforce Classic.

[Reps Can Add Meaning to Notes with Rich Text](#)

Your sales reps can now add formatted text to notes using the formatting options in the composer window, or via copy-and-paste. This feature is available in Lightning Experience only.

EDITIONS

Notes available in Lightning Experience in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

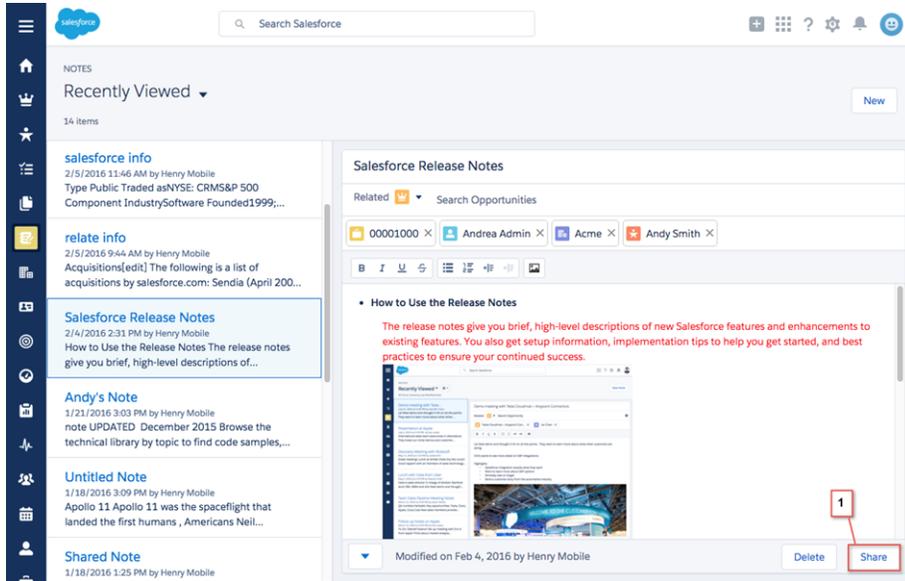
Notes available in Salesforce Classic in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Share Notes with Other Users or Groups

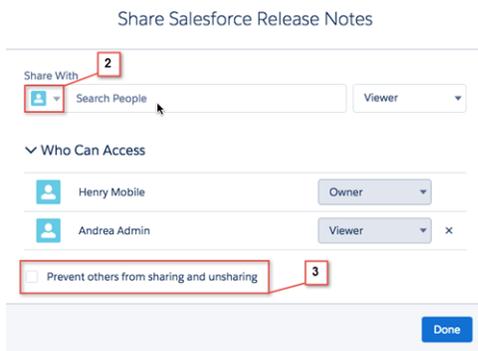
Sales users can now collaborate more easily by sharing notes with their teammates or Chatter groups. Recipients of a shared note can view notes but not edit them. This feature is available in both Lightning Experience and Salesforce Classic.

Here's how users share notes.

1. Open a note you want to share.
2. Click **Share** (1).



3. Choose whether to share with a user or a group (2) and enter the names.
4. Choose whether to let recipients share or unshare the note (3).



5. Click **Share**.
- The users you share with receive an email with a link to the shared note.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Reps Can Add Meaning to Notes with Rich Text

Your sales reps can now add formatted text to notes using the formatting options in the composer window, or via copy-and-paste. This feature is available in Lightning Experience only.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Activities: Keep Up with the Speed of Business in Lightning Experience

A way of creating calendars based on Salesforce objects helps all your users keep better tabs on important dates. Improvements in the activity timeline and the task list make sales reps more effective.

IN THIS SECTION:

[Create a Calendar from Anything in Salesforce](#)

Do you and your users want an easy, visual way to track upcoming or ongoing campaigns? Support cases? Retail store events? Opportunities due to close? In seconds, anyone can create a calendar from a standard or custom object by choosing a date field representing data they want to track. The calendar displays data in that field as calendar items. Users can customize most calendars by applying a list view, and they can edit and delete calendars they've created. Some considerations apply to creating calendars. This feature is available in Lightning Experience only.

[My Opportunities Calendar \(Beta\) Retired—Now You Can Create Your Own Calendars](#)

We've retired the My Opportunities calendar after a successful beta release. You can re-create it, and easily visualize the dates on other Salesforce objects, using a new feature for creating calendars—see [Create a Calendar from Anything in Salesforce](#). This feature was available in Lightning Experience.

[Your Calendar Shows Your Selected Time Zone](#)

When your sales reps are traveling or between trips, a glance at their calendar reminds them which time zone is selected in their Salesforce settings. (Events reflect a user's Salesforce time zone and locale settings, not the time zone setting on a user's computer or device.) Time zone is shown relative to Greenwich Mean Time. This feature is available in Lightning Experience.

[Email Looks Like Email in the Activity Timeline](#)

We've improved the way email records look in the activity timeline—now they look the way you expect emails to look. Fields like From, To, and Subject are easy to scan. This feature is available in Lightning Experience.

[Use the Activity Timeline to Work Your To-Do List Faster](#)

Now sales reps can log calls and update upcoming meetings and tasks faster, without leaving the activity timeline. A new menu on timeline items contains actions for updating activities. This feature is available in Lightning Experience.

[In the Task List, Edit Tasks Inline](#)

Now your sales reps can update tasks fast, without switching between list and detail pages. This feature is available in Lightning Experience only.

EDITIONS

Available in Lightning Experience in: **Contact Manager, Personal, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

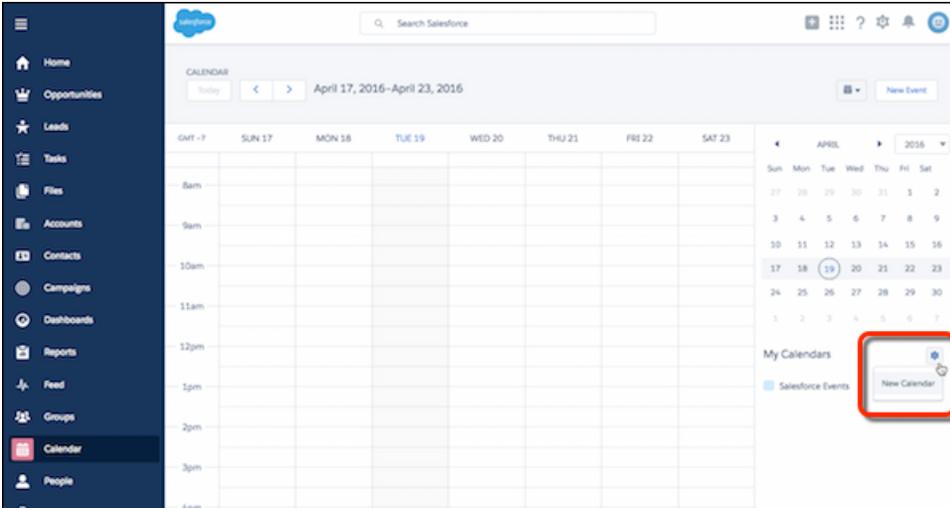
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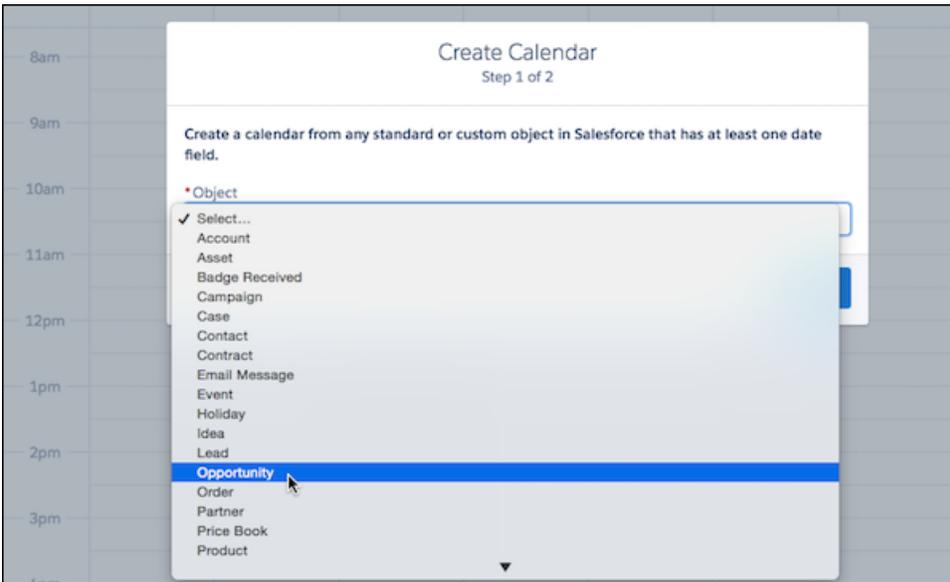
1. Start creating a calendar.

EDITIONS

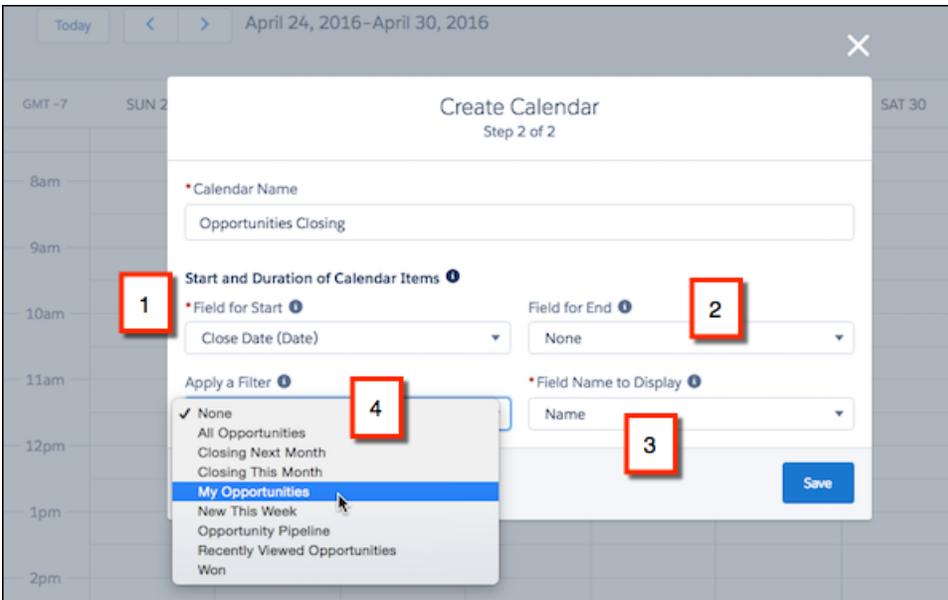
Available in: **Enterprise, Unlimited,** and **Developer** Editions



2. Choose an object to base the calendar on.



3. Select fields that determine what the calendar displays **(1, 2, 3)**.
If you want, filter the calendar items by selecting a list view **(4)**.



The calendar displays items differently depending on the date fields you select.

(Date) Fields

Close Date (Date)

The names of some date fields include (Date). If you select a (Date) field, the calendar displays items across the top (as all-day items).

(Date/Time) Fields

Last Modified Date (Date/Time)

The names of other date fields include (Date/Time). If you select a (Date/Time) field in **Field for Start**, the calendar displays items in time slots. If you also select a field in **Field for End** (it's optional) and the items' duration exceeds 24 hours, the calendar displays the items across the top (as all-day items).

Selecting Start and End Fields

Start and Duration of Calendar Items ⓘ

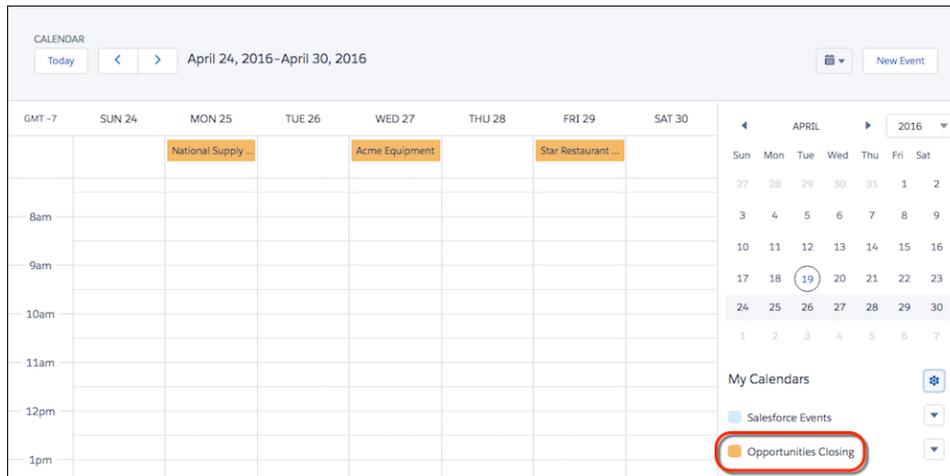
*Field for Start ⓘ Field for End ⓘ

Select... None

Field for End is optional. If you use it, you must select the same type of field as you do in **Field for Start**. For example, if you select a (Date) field in one, you can't select a (Date/Time) field in the other. If you select fields that generate dates in the wrong order (end before start), Salesforce displays an error message when you save the calendar.

The color of each calendar is the color of the object it's based on. (If a custom object has a theme, the theme determines the color of the calendar.) You can hide or show individual calendars. (You can hide the Salesforce Events calendar, too, but it's not otherwise configurable.)

Suppose that you show a calendar containing enough items to push the total items past the limit (150 items) in that view. Salesforce displays an alert and hides items on other calendars.



IN THIS SECTION:

[Considerations for Calendars Created from a Salesforce Object](#)

Considerations for calendars created from a Salesforce object include support for list view filtering, a limit on the number of items that can be displayed, subscribing to calendars, and support for standard objects. See [details on considerations for creating a calendar](#) in the *Salesforce Help* (unavailable during release preview).

SEE ALSO:

[Salesforce Help: Create a Calendar of Opportunity Close Dates](#) (unavailable during release preview)

[Salesforce Help: Create a Calendar of Task Due Dates](#) (unavailable during release preview)

[Salesforce Help: Create a Calendar of Direct-Mail Campaigns](#) (unavailable during release preview)

[Salesforce Help: Create a Calendar to View Open Cases by SLA](#) (unavailable during release preview)

[Lightning Experience: A Modern and Intelligent User Experience](#)

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My Opportunities Calendar (Beta) Retired—Now You Can Create Your Own Calendars

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SEE ALSO:

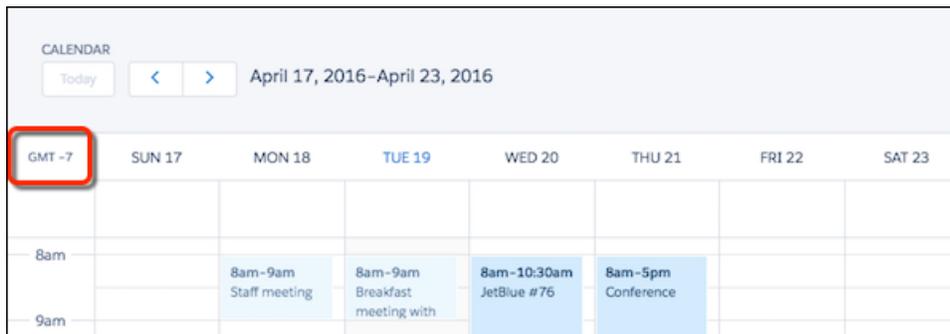
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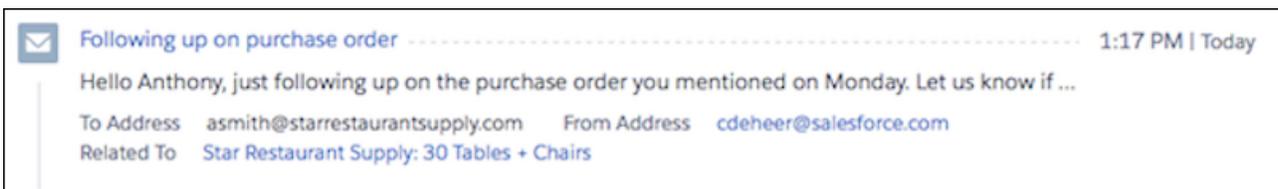
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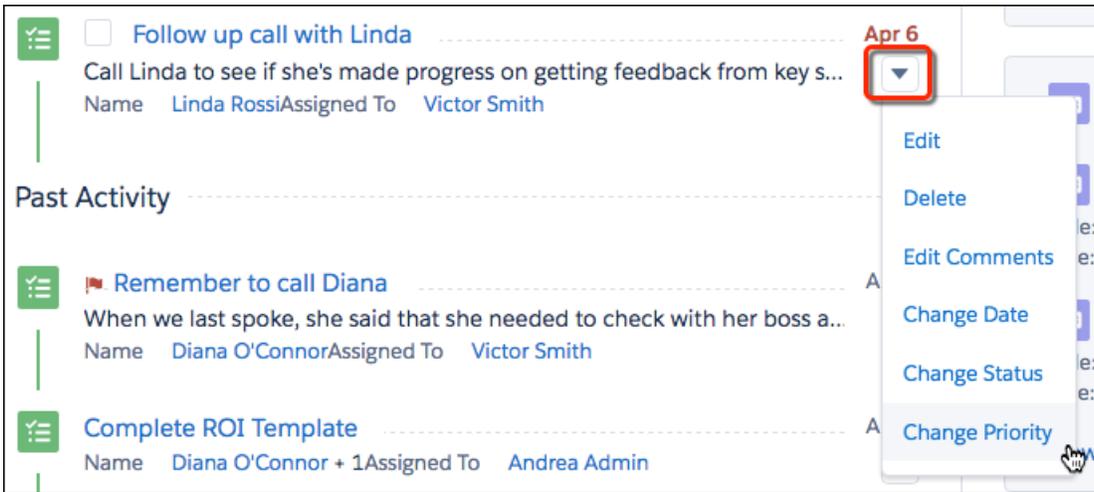


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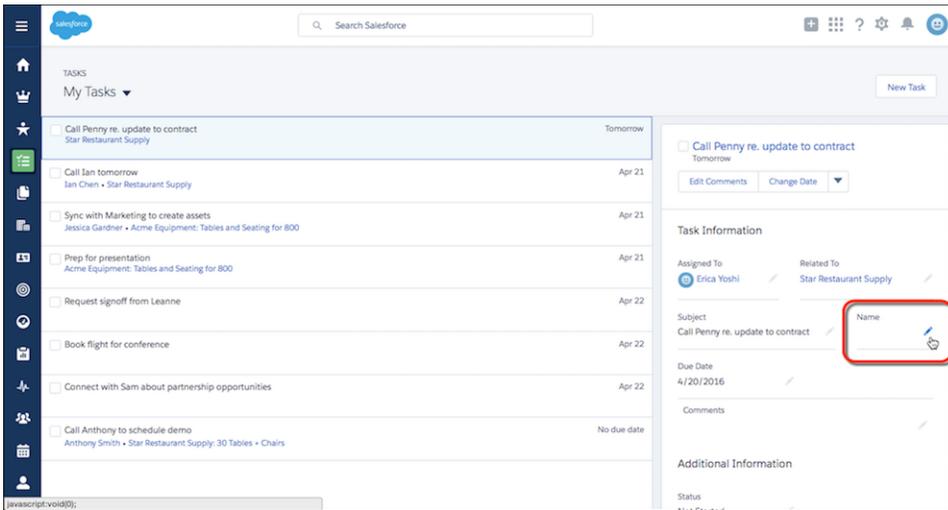


SEE ALSO:

- [Lightning Experience: A Modern and Intelligent User Experience](#)
- [Manage Work and View Past Activity in Lightning Experience](#)

In the Task List, Edit Tasks Inline

Now your sales reps can update tasks fast, without switching between list and detail pages. This feature is available in Lightning Experience only.



SEE ALSO:

- [Lightning Experience: A Modern and Intelligent User Experience](#)

List Views: Target Relevant Data with List View Enhancements for Lightning Experience

With the addition of filter logic, enhanced list view display and controls, and auto-complete search in Lightning Experience, sales and service professionals can take advantage of powerful ways to zero in on relevant data.

IN THIS SECTION:

[Filter List Views with a Fine-Toothed Comb in Lightning Experience](#)

Lightning Experience filtering capabilities are now on par with the sleek efficiency of the user interface. With the addition of filter logic, your reps can pinpoint the data they need while enjoying an intuitive user experience. Reps can see available filters without editing a list view, and edit filters on the fly. This feature is available in both Lightning Experience and Salesforce Classic.

[Create Filters Effortlessly in Lightning Experience](#)

We took the “funky” out of creating list view filters in Lightning Experience, and just kept the “fun.” The new streamlined process lets you create filters as quickly as you can think of them. This feature is available in both Lightning Experience and Salesforce Classic.

[Navigate List Views with Ease in Lightning Experience](#)

Reps enjoy better browsing of record data with enhanced list view controls and default views. They can jump to a particular list view with new on-the-fly search, optimizing the benefit of custom list views. We’ve also streamlined list view behavior so that your reps can get their data and get on their way. This feature is available in Lightning Experience only.

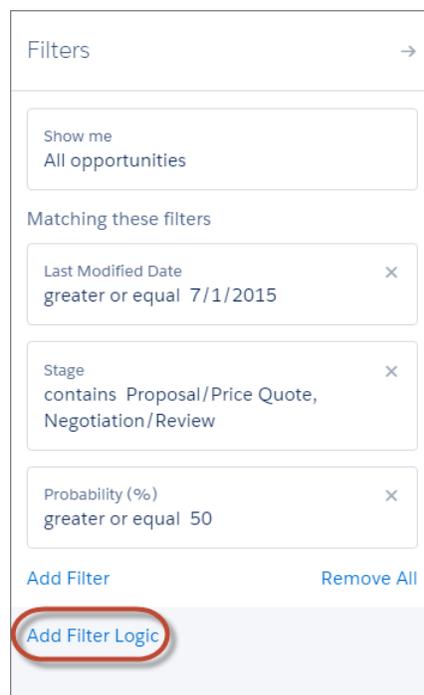
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Filter logic in Lightning Experience works just like in Salesforce Classic. Add filter logic from the Filters panel.



Reps can specify up to 10 fields to filter by. You can use filter *operators* like "equals," "contains," or "greater than." Each filter is given a number that's used in the logic statement.

Filter logic *operands* determine how to consider each filter, and in what order, for the current list view. Constrain list view results with these operands.

Operand	Definition
AND	Finds records that match both values. 1 AND 2
OR	Finds records that match either value. 1 OR 2
NOT	Finds records that exclude values. For example, Filter 1 is Industry equals Biotechnology . You set filter logic as NOT 1 . Your report returns records that don't have Biotechnology as the Industry value.

Let's say a rep wants to see all opportunities created in July 2015 or later, that are either in late stages of negotiation or have high probability to close, or both. Here are the filters:

1. Last Modified Date greater or equal 7/1/2015
2. Stage contains Proposal/Price Quote, Negotiation/Review
3. Probability greater or equal 50

Then the rep adds the logic statement: *1 AND (2 OR 3)*.

OPPORTUNITIES

Recent Promising Opportunities ⌵ ⚙️

8 items · Sorted by Opportunity Name · Filtered by Last Modified Date, Stage, Probability (%) · Last updated 03/11/2016 at 11:30

OPPORTUNITY NAME ↑	ACCOUNT NAME	STAGE	CLOSE DATE	AMOUNT
August Order	Emerson Electric Co	Perception Analysis	8/29/2015	\$250,000.00
Avocados	Rosa Mexicano	Id. Decision Makers	7/31/2015	\$5,700.00
Cell Towers	AT&T Corp	Negotiation/Review	7/31/2015	\$250,000.00
Cilantro	Rosa Mexicano	Id. Decision Makers	7/14/2015	\$1,200.00
Microprocessors	Advanced Micro D...	Closed Won	9/21/2015	\$150,000.00
Tomatoes	Chipotle2	Value Proposition	1/5/2016	\$68,000.00
Tomatoes	Rosa Mexicano	Value Proposition	7/31/2015	\$4,050.00
Tomatoes	H.J. Heinz Company	Value Proposition	11/12/2015	\$60,000.00

Filters →

Show me
All opportunities

Matching these filters

- Last Modified Date greater or equal 7/1/2015 ×
- Stage contains Proposal/Price Quote, Negotiation/Review ×
- Probability (%) greater or equal 50 ×

[Add Filter](#) [Remove All](#)

Filter Logic ⓘ [Remove](#)

1 AND (2 OR 3)

Known limitations for this release

- NOT doesn't work with parenthetical expressions. For example, the expression `1 AND NOT (2 AND 3)` evaluates as `1 AND (NOT 2 AND 3)`. In the filter results, no records are returned when you'd expect to see some records.
- Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

Create Filters Effortlessly in Lightning Experience

We took the “funky” out of creating list view filters in Lightning Experience, and just kept the “fun.” The new streamlined process lets you create filters as quickly as you can think of them. This feature is available in both Lightning Experience and Salesforce Classic.

From the Filters panel, click **Add Filter** and define your filter without leaving the pane you're working in. Click **Done**, and either save the list view or add more filters.

OPPORTUNITIES

My Opportunities ▾ ⚙️

8 items • Sorted by Account Name • Filtered by Amount • Last updated 03/16/2016 at 09:40

OPPORTUNITY NAME	ACCOUNT NAME ↓	STAGE	CLOSE DATE	AMOUNT
Avocados	Rosa Mexicano	Id. Decision Make...	7/31/2015	\$5,700.00
Cilantro	Rosa Mexicano	Id. Decision Make...	7/14/2015	\$1,200.00
Tomatoes	Rosa			
Waterproof diving figurines	Rosa			
Tomatoes	Qdo			
Logo Patches	Hark			
DVD Cases	Bloc			
LCD screens	App			

Filters →

Show me My opportunities

Matching all of these filters

Amount less than "\$55,000" ×

New Filter* ×

Add Filter Remove All

Add Filter Logic

New Filter

Account Name ▾

Operator

equals ▾

Value

Done

Navigate List Views with Ease in Lightning Experience

Reps enjoy better browsing of record data with enhanced list view controls and default views. They can jump to a particular list view with new on-the-fly search, optimizing the benefit of custom list views. We've also streamlined list view behavior so that your reps can get their data and get on their way. This feature is available in Lightning Experience only.

- The List View Controls menu now displays up to 2,000 views instead of 250. List views load in batches of 50 as you scroll down, with infinite scrolling. Recent list views appear at the top, followed by other list views.
- Auto-complete search lets reps find a specific list view quickly right from List View Controls. So reps can utilize custom list views, and work efficiently even when there are lots of views. The Search box appears at the top of the menu whenever there are more than 10 list views.

ACCOUNTS

My Accounts ▾ ⚙️

Q acc

Accounts by date

All Accounts

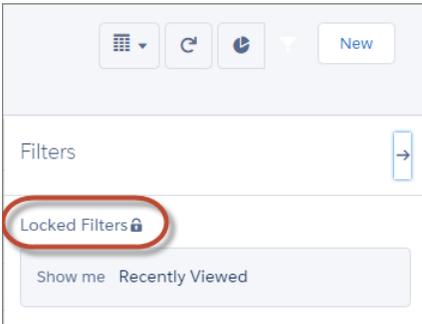
✓ My Accounts

Recently Viewed Accounts

- All buttons are visible for all list views. For predefined list views that don't offer filters or charts (like Recently Viewed), the Filters and Charts buttons are grayed out.



- If a rep doesn't have permission to edit a public list view, or a list view doesn't support filtering, the Filters panel is locked.



- **Note:** Some list views have predefined filter scopes and can't be filtered. For example, the SOQL query for a generic Team list view or the Recently Viewed list view doesn't allow further filtering of the query results.

Microsoft® Integration: Sync and Work Between Microsoft Systems and Salesforce

Save your sales reps time when you set up their systems to sync contacts, events, and tasks between Microsoft email systems and Salesforce. And help your reps create and work with Salesforce records directly in Outlook®.

IN THIS SECTION:

[Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud](#)

Get more done without switching between Microsoft applications and Salesforce. And learn about our new product name that better reflects the direction we're taking for expanding our email integration efforts. This feature is available in both Lightning Experience and Salesforce Classic.

[Exchange Sync: Sync Microsoft® Contacts and Events Without Software](#)

Keep your sales reps' contacts and events in sync between Microsoft® Exchange-based email and Salesforce without requiring reps to install and maintain software. Learn about our big changes this release, as we release as a generally available feature: Check out our shiny, new product name (keeping us aligned with Lightning for Outlook), and stay informed about key functionality changes. In addition, learn about our cool new features that let your reps choose which events sync to Salesforce, or delete syncing events in one action. You can manage Lightning Sync from both Lightning Experience and Salesforce Classic.

[Connect for Office: Change of Availability in March 2017](#)

When Salesforce disables TLS 1.0, Connect for Office will no longer function.

[Standard Mail Merge: Change of Availability in March 2017](#)

When Salesforce disables TLS 1.0, standard Mail Merge will no longer function. However, Salesforce continues to support Extended Mail Merge, and encourages reps to transition to this feature soon.

Salesforce App for Outlook: Integrate Microsoft and Salesforce in the Cloud

Get more done without switching between Microsoft applications and Salesforce. And learn about our new product name that better reflects the direction we're taking for expanding our email integration efforts. This feature is available in both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Our New Name Reflects the Growth of Our Email Integration Lineup](#)

When we told you that we're investing heavily in our latest email integration products, we were serious. So to make room for our expanded email integration lineup, we've changed the name *Salesforce App for Outlook* to *Lightning for Outlook*.

[New Design Maximizes Space in Outlook 2016](#)

See more of Salesforce in less space. In Outlook 2016, Lightning for Outlook now appears as a side panel, which makes the most of vertical space and improves your sales reps' experience. This feature is available in both Lightning Experience and Salesforce Classic.

[Relate Outlook Calendar Events to Salesforce Records](#)

Sales reps can now relate specific Outlook events to relevant Salesforce records. This feature is available in both Lightning Experience and Salesforce Classic.

[Search for Salesforce Records in Microsoft Outlook](#)

We've made life easier for your reps when it comes to finding their Salesforce records while working with email and appointments in Outlook. Let's say your reps select an email or appointment in Outlook, but the Salesforce records your reps want to see don't appear. Now your reps can search for specific Salesforce records directly in Outlook. This feature is available in both Lightning Experience and Salesforce Classic.

[Streamlined Login Process](#)

We want to make a good impression for your reps when they log in for the first time. We've improved the flow and made the process easier. This feature is available in both Lightning Experience and Salesforce Classic.

[Find Lightning for Outlook More Easily in Outlook 2016](#)

Easily find Lightning for Outlook directly on the ribbon in Outlook 2016. This feature is available in both Lightning Experience and Salesforce Classic.

[Lightning for Outlook Available in Group and Professional Editions](#)

If your company uses Salesforce Group or Professional editions, your sales reps can now take advantage of Lightning for Outlook perks. This feature is available in both Lightning Experience and Salesforce Classic.

[Other Changes for Lightning for Outlook](#)

Learn about other things going on with Lightning for Outlook. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

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Available in Salesforce Classic in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

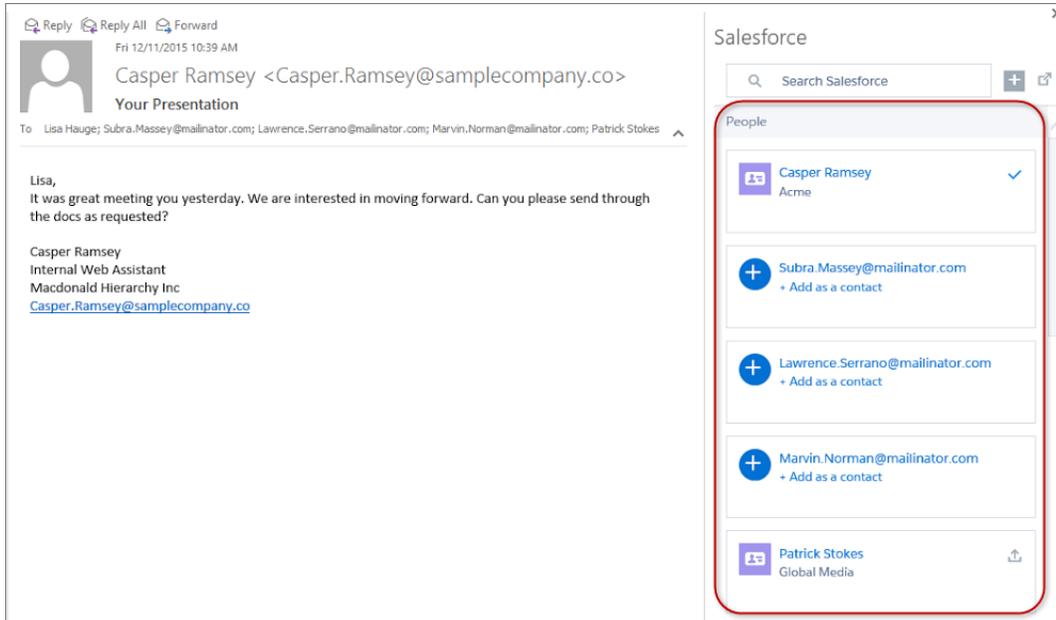
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The new name *Lightning for Outlook* also goes hand in hand with the new name for the sync component *Lightning Sync*, previously known as Exchange Sync.

New Design Maximizes Space in Outlook 2016

See more of Salesforce in less space. In Outlook 2016, Lightning for Outlook now appears as a side panel, which makes the most of vertical space and improves your sales reps' experience. This feature is available in both Lightning Experience and Salesforce Classic.

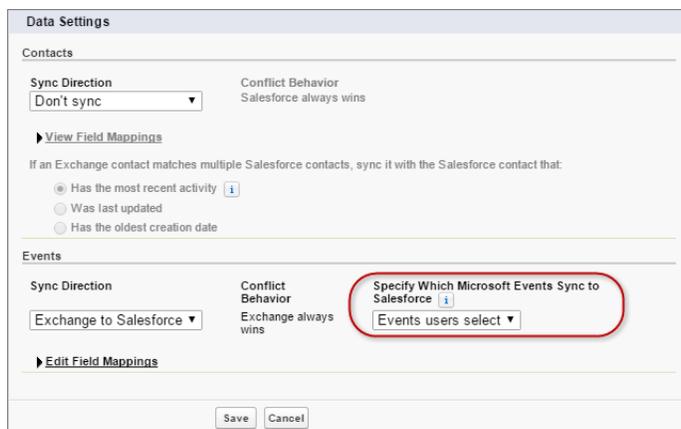


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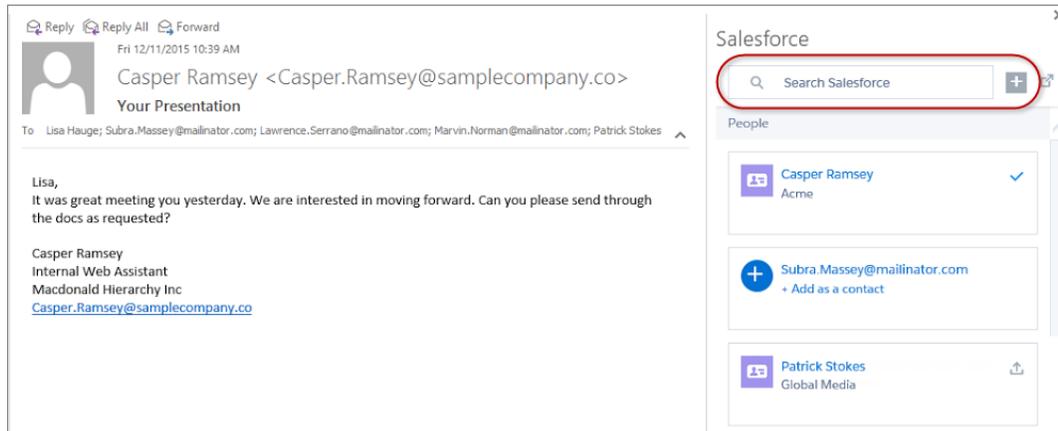
And if you have Lightning Sync enabled (the sync component for Lightning for Outlook), those events and any updates to them begin syncing with Salesforce.

Before these events can begin syncing, open your reps' sync configurations. For the option **Specify Which Events Sync to Salesforce**, select **Events users select**.



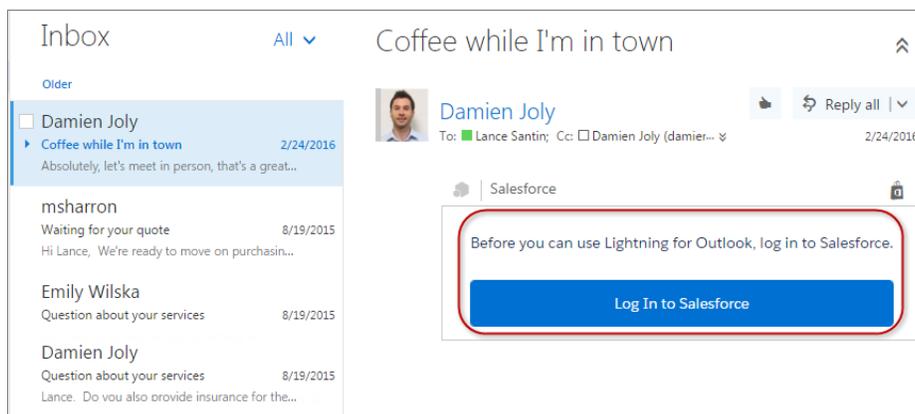
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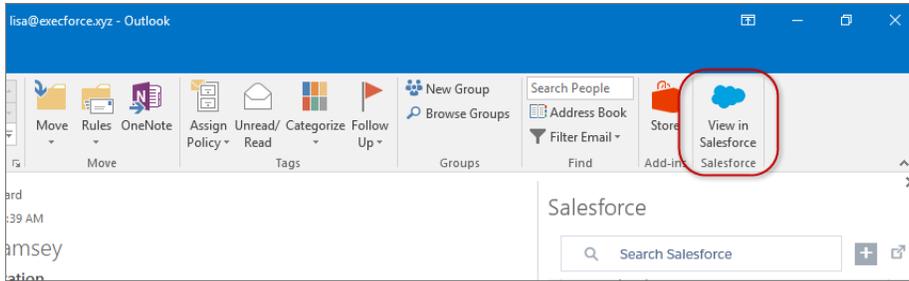
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If your company uses Salesforce Group or Professional editions, your sales reps can now take advantage of Lightning for Outlook perks. This feature is available in both Lightning Experience and Salesforce Classic.

Other Changes for Lightning for Outlook

Learn about other things going on with Lightning for Outlook. This feature is available in both Lightning Experience and Salesforce Classic.

Sales Reps No Longer Need the Permission **View Setup and Configuration**

Until now, sales reps needed the permission to authenticate the connection between Microsoft Exchange and Salesforce. The permission is still available, but sales reps don't need it for authentication anymore.

Verify Your Security Protocol to Avoid Service Interruptions

Learn how to prepare computing environments so that your reps can [continue using Lightning for Outlook after TLS 1.0 disablement](#). Note that you won't get an accurate reading of your Lightning for Outlook readiness for TLS 1.0 disablement if you decide to test your computing environment with the [Critical Update Console \(CRUC\) setting](#). Lightning for Outlook continues to work regardless of whether you enable the CRUC setting.

Exchange Sync: Sync Microsoft® Contacts and Events Without Software

Keep your sales reps' contacts and events in sync between Microsoft® Exchange-based email and Salesforce without requiring reps to install and maintain software. Learn about our big changes this release, as we release as a generally available feature: Check out our shiny, new product name (keeping us aligned with Lightning for Outlook), and stay informed about key functionality changes. In addition, learn about our cool new features that let your reps choose which events sync to Salesforce, or delete syncing events in one action. You can manage Lightning Sync from both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

[Call Us Lightning Sync From Now On](#)

We're staying in step with Lightning for Outlook and revealing a new name for our latest Microsoft Integration sync feature: Exchange Sync is now known as Lightning Sync.

[Sync Your Contacts and Events with Lightning Sync \(Generally Available\)](#)

No need to wait any longer: Lightning Sync is open for business! Enable the feature and give up installing sync software for good. The sync component of Lightning for Outlook is now generally available and ready to sync your sales reps' contacts and events directly from the cloud.

[Exchange 2010 Support Retired for New Customers](#)

We're retiring support for Microsoft® Exchange 2010 to focus our development on supporting the most current Microsoft applications. That makes it easy to set up reps for both Lightning Sync and Lightning for Outlook, because now both features have the same system requirements:

[Event Sync Direction Is Now Exchange to Salesforce](#)

We offer the option to sync events from Microsoft® Exchange to Salesforce. We're working on additional sync direction options to give you and your sales teams even more flexibility for syncing events.

[Sales Reps Can Delete Syncing Events in One Action](#)

Help your reps manage their events efficiently. Set up reps to delete events from both their Exchange-based calendars and Salesforce in one action.

[Let Sales Reps Select Which Exchange Events Sync to Salesforce](#)

Sales reps have tons of appointments on their calendars, but only a subset of those events contains valuable data reps want to track in Salesforce. Now you can set up your reps to select only the Exchange events they want to sync to Salesforce.

[Get More Information About Your System Status at a Glance](#)

Stay a step ahead of sync issues and get more details about how the feature is functioning—all from the same page in Salesforce Setup.

[Verify Your Security Protocol to Avoid Service Interruptions](#)

Work with your Exchange administrator to enable TLS 1.1 or later on your Microsoft Exchange server to continue syncing your reps' contacts and events.

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IN THIS SECTION:

[Considerations for Syncing Events](#)

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations for syncing events. That way, your rollout generates no surprises.

[Guidelines for Rolling Out Event Sync](#)

Before you roll out Lightning Sync, address these guidelines to avoid overwriting event data during certain sync scenarios.

Considerations for Syncing Events

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations for syncing events. That way, your rollout generates no surprises.

First, does one of these scenarios describe your rollout?

- You're migrating reps from Salesforce for Outlook
- Your reps edit their events records in Salesforce
- Your reps already have access to Lightning for Outlook (previously known as Salesforce App for Outlook)

If one does, keep in mind that there is potential for Lightning Sync to overwrite event data unless you're considerate about how you roll out the feature to your reps.

For example, say that your rep maintains meeting notes in Salesforce event records. But the matching event in that rep's Exchange-based calendar doesn't include those notes. During the first sync, Lightning Sync overwrites the event in Salesforce with the one from the calendar.

To avoid overwriting event data, make sure you review [Guidelines for Rolling Out Event Sync](#).

Guidelines for Rolling Out Event Sync

Before you roll out Lightning Sync, address these guidelines to avoid overwriting event data during certain sync scenarios.

- In Lightning Sync configurations, don't change the default setting, `TODAY`, for the event sync filter. That way, edits that your reps made to past events in Salesforce are excluded from the initial sync.
- Tell reps that events sync from Microsoft® Exchange-based calendars to Salesforce.
- Tell reps to edit event fields that sync (like date, time, subject, or description) in their calendars, and not in Salesforce. That way, Lightning Sync doesn't overwrite those edits in Salesforce. (Reps can continue to use features in Salesforce that don't sync with their calendars, however, like relating events to Salesforce records.)

Sales Reps Can Delete Syncing Events in One Action

Help your reps manage their events efficiently. Set up reps to delete events from both their Exchange-based calendars and Salesforce in one action.

To let reps delete syncing events in one action, select **Automatically remove deleted Exchange events from Salesforce** on your reps' sync configurations. Then, reps can delete events from their Exchange-based calendar, and Lightning Sync deletes the event's counterpart in Salesforce.

Because Lightning Sync only syncs from Exchange to Salesforce, Lightning Sync delete only works when sales reps delete events from their Exchange-based email. If reps delete a syncing event from Salesforce, the event's counterparts remains in Exchange.

Events that reps move out of their default Exchange calendar and into a secondary calendar are also deleted from Salesforce.

USER PERMISSIONS

To view configurations:

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

Let Sales Reps Select Which Exchange Events Sync to Salesforce

Sales reps have tons of appointments on their calendars, but only a subset of those events contains valuable data reps want to track in Salesforce. Now you can set up your reps to select only the Exchange events they want to sync to Salesforce.

Your reps already use Lightning for Outlook to relate important events from their Outlook calendars to Salesforce records. However, if reps edit those Outlook events, changes aren't captured in Salesforce unless reps add changes manually.

Now you can set an option to sync those related events between Outlook and Salesforce. That way, changes reps make to Outlook events they've related to Salesforce records are added to Salesforce automatically.

And best of all, the option lets reps choose which Exchange events sync to Salesforce, rather than committing reps to syncing all their events.

Follow these steps to set up reps to select which Exchange events sync to Salesforce.

1. Confirm that you've enabled Lightning for Outlook that the reps have set up Lightning for Outlook.
2. Tell reps that events they relate to Salesforce records are syncing. Reps should edit sync event fields (like date, time, subject, or description) in their Microsoft calendars, and not in Salesforce. That way, Lightning Sync doesn't overwrite those edits in Salesforce.
3. In reps' Lightning Sync configurations, don't change the default setting, TODAY, for the event sync filter. That way, edits that your reps made in Salesforce to past events are excluded from the initial sync.
4. In reps' Lightning Sync configurations, enable the feature. For the option Specify Which Events Sync to Salesforce, select **Events Users Select**.

The screenshot shows the 'Data Settings' configuration page. Under the 'Events' section, the 'Specify Which Microsoft Events Sync to Salesforce' dropdown menu is highlighted with a red circle and set to 'Events users select'. Other settings include 'Sync Direction' set to 'Exchange to Salesforce' and 'Conflict Behavior' set to 'Exchange always wins'.

USER PERMISSIONS

To view configurations:

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

Get More Information About Your System Status at a Glance

Stay a step ahead of sync issues and get more details about how the feature is functioning—all from the same page in Salesforce Setup.

Table 1: New System Status

Status	What it tells you
Lightning for Outlook enabled	If you set up sales reps to select which Microsoft events sync to Salesforce, users select those events using Lightning for Outlook. This status confirms whether an admin has enabled it in Salesforce.

Table 2: New User Statuses

Status	What it tells you
User set up Lightning for Outlook	If you set up your sales reps to choose which Microsoft events sync to Salesforce, reps select those events using Lightning for Outlook. This status confirms whether the rep whose status you checked has set up Lightning for Outlook.
User mailbox is running on supported version of Microsoft Exchange	This status confirms whether the rep whose status you checked is running a mailbox on a version of Microsoft Exchange that Lightning Sync supports.

Verify Your Security Protocol to Avoid Service Interruptions

Work with your Exchange administrator to enable TLS 1.1 or later on your Microsoft Exchange server to continue syncing your reps' contacts and events.

Check out our article on how to prepare computing environments so that your reps can [continue using Lightning Sync after Salesforce disables TLS 1.0](#).

Review the [disablement schedule](#) for more details. Note that you won't get an accurate reading of your Lightning Sync readiness for TLS 1.0 disablement if you decide to test your computing environment with the [Critical Update Console \(CRUC\) setting](#). Lightning Sync continues to work regardless of whether you enable the CRUC setting.

Connect for Office: Change of Availability in March 2017

When Salesforce disables TLS 1.0, Connect for Office will no longer function.

Salesforce is disabling support for TLS 1.0 on a rolling schedule starting in mid-2016 and ending in March 2017. Check the "Salesforce Disables TLS 1.0" article for the most current schedule.

When Salesforce disables TLS 1.0, sales reps will no longer be able to use Connect for Office to access the following features.

- Microsoft Word Add-In that lets reps create templates using Salesforce data for mail merge
- Microsoft Excel Add-In that lets reps access Salesforce reports with Microsoft Excel

Reps can remove Connect for Office from their systems by uninstalling the feature.

Check back here in the coming months for links to alternative product suggestions.

SEE ALSO:

[Knowledge Article: Salesforce Disabling TLS 1.0](#)

Standard Mail Merge: Change of Availability in March 2017

When Salesforce disables TLS 1.0, standard Mail Merge will no longer function. However, Salesforce continues to support Extended Mail Merge, and encourages reps to transition to this feature soon.

Salesforce is disabling support for TLS 1.0 on a rolling schedule starting in mid-2016 and ending in March 2017. Check the "Salesforce Disables TLS 1.0" article for the most current schedule.

Standard Mail Merge is an installed feature that let sales reps generate mail merges directly from Microsoft Word. When Salesforce disables TLS 1.0, standard Mail Merge won't be able to establish a connection between Salesforce and Word. That means that sales reps won't be able to use standard Mail Merge to create mail merge templates and generate mail merges.

We encourage reps to transition to Extended Mail Merge, which is compatible with Salesforce-supported versions of TLS, like TLS 1.1 and higher. Extended Mail Merge is different from standard Mail Merge because it lets reps generate Salesforce mail merges without requiring reps to install software. Instead, reps generate mail merges directly from Salesforce records. And because there's no need to install software, there are no systems requirements that restrict users working from certain computing environments.

Extended Mail Merge doesn't create mail merge templates automatically. However, reps can generate mail merges using templates they created previously using standard Mail Merge, or create templates manually in Word.

To create templates manually, reps can use the "URL to Locate Record Field Names For Mail Merge" article to learn which Salesforce fields are available for reference in templates. After reps create templates, reps can upload templates to Salesforce, and then generate them directly from Salesforce records.

To get started with Extended Mail Merge, call Salesforce Customer Support to enable the feature for your org.

SEE ALSO:

[Knowledge Article: Salesforce Disabling TLS 1.0](#)

[Knowledge Article: URL to Locate Record Field Names For Mail Merge](#)

Data Quality: View a Data.com Data Assessment in Lightning Experience

Do you really know if your account data meets your needs? Do you want to find out how good it really is? Knowledge is power, and Data.com's Data Assessment gives you all the details to make an informed decision about your account data quality.

Data Assessment is available for United States and Canadian orgs with Professional Edition or above. You can't be an existing Data.com Clean org, and your org's status must be active, trial, or demo.

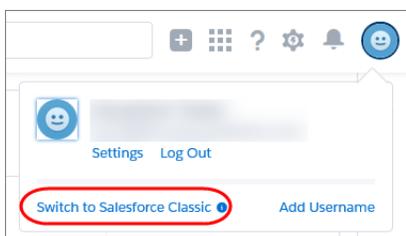
Whether you have thousands or millions of accounts, Data Assessment helps you understand just how healthy your customer account data really is. The assessment provides feedback on the matchability, accuracy, and uniqueness of your account data.

However, a Data.com Clean setting must first be activated from the Salesforce Classic user interface. Data Assessment only evaluates and reports on your org's data quality. Data Assessment does not change any data in your org.

Important: If your org isn't eligible for a data assessment, you don't see the Company Info for Accounts clean rule.

Follow these steps to activate the Data.com Clean rule required for Data Assessment.

1. Make sure that you are in Salesforce Classic.



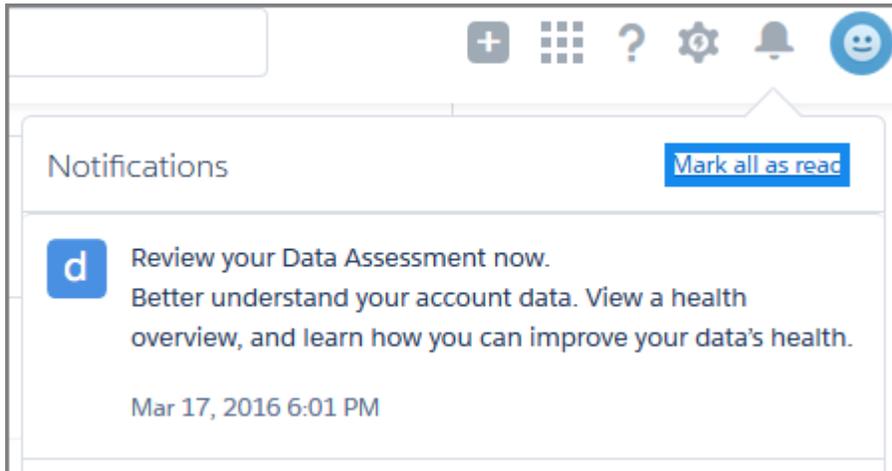
2. From Setup, enter `Data.com` in the **Quick Find** box, then select **Data.com Administration > Clean > Clean Rules**.
3. Click **Activate** next to the Company Info for Accounts rule.
4. Review the terms of the Data Assessment Agreement and click **OK**.
5. From the User menu, click **Switch to Lightning Experience**.

EDITIONS

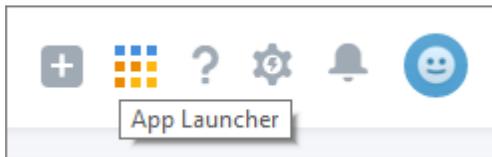
Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

The admin who activated the Data.com Clean rule receives a notification when the assessment is complete and ready to view. It can take more than 24 hours depending on the size of your org.

- Important:** If your org has 100 or fewer accounts, no notification is sent. Go to the App Launcher to view the assessment.
- If your org has more than 100 accounts, when your assessment is ready, Salesforce notifies you by email and in Lightning Experience.
- The assessment can take 24 hours or more, depending on the size of your org.



Admins can access the Data Assessment at any time. Go to the App Launcher in Lightning Experience.



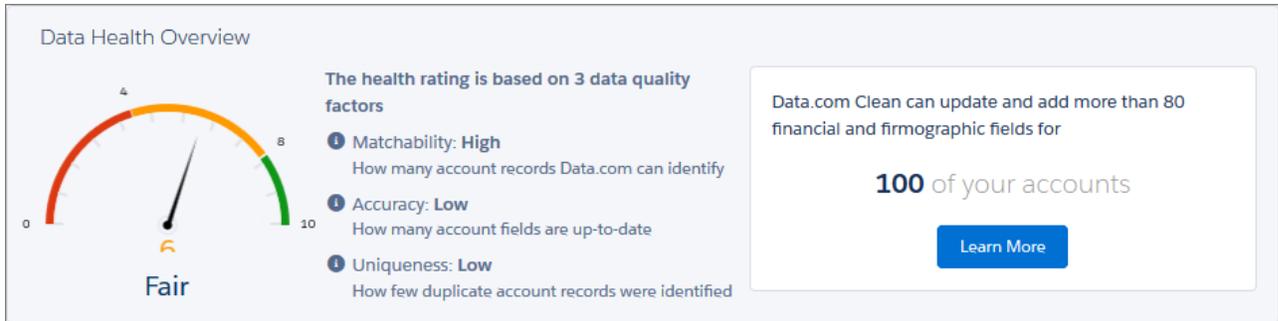
Click Data Assessment app.



The Data Assessment has two tabs, Data Quality and Customer Segmentation.

Data Quality

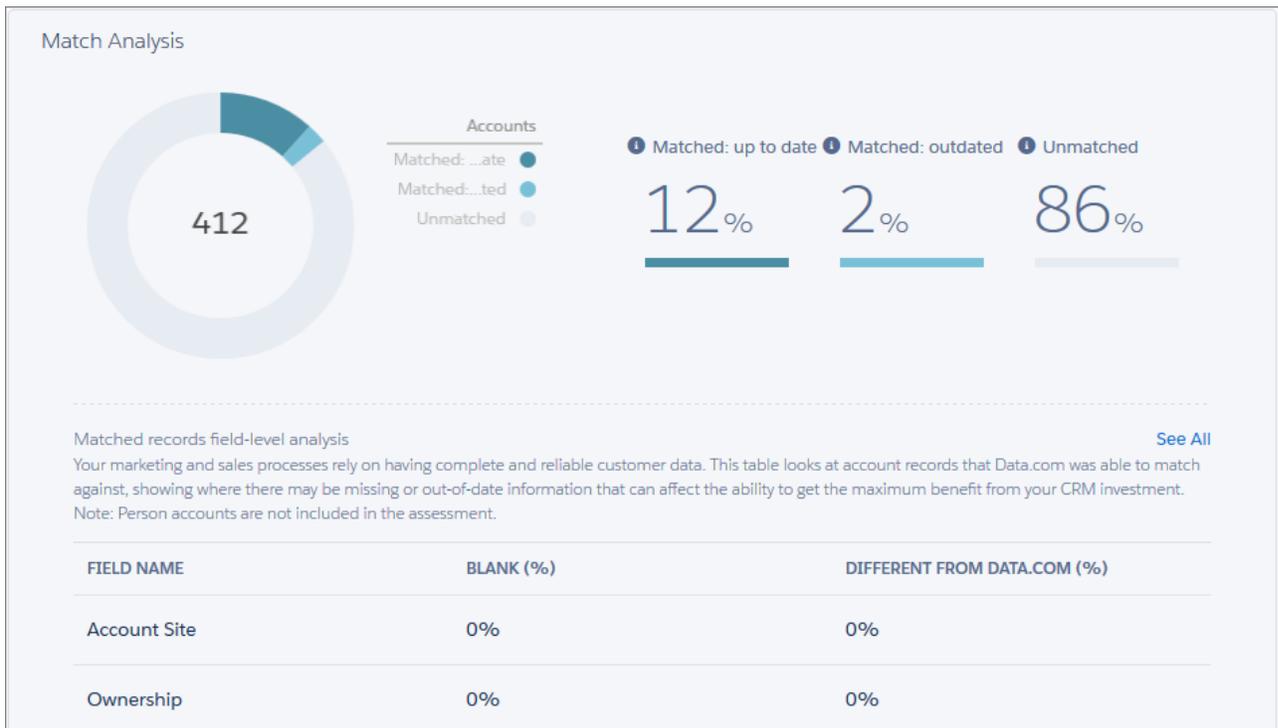
A data assessment includes overall data quality and detailed field level assessment of key fields.



Your account data is given an overall health score that's calculated using three factors.

- **Matchability**—Matchability reflects how easy it is to keep your CRM records up-to-date and complete using Dun & Bradstreet referential data. Highly matchable CRM records generally have good fill-rates for key identifiers, such as address fields and company website. A higher rating for matchability improves your overall data health rating.
- **Accuracy**—Accuracy is a measure of the percentage of your account records that are complete and up-to-date when compared to the Dun & Bradstreet data set. If valuable marketing and sales data, such as firmographics and financials, is incomplete or out-of-date, the usefulness of the record is diminished. A higher rating for accuracy improves the overall data health rating.
- **Uniqueness**—Uniqueness is based on the number of duplicate accounts that were identified from the matched records. The presence of duplicates creates issues affecting the ability to find and report on data, reducing employee productivity, and decreasing user satisfaction. A higher rating for uniqueness improves the overall data health rating.

The Match Analysis provides a summary of the percentages of matched and up-to-date records, matched and outdated records, and unmatched records.



- **Matched up-to-date**—Percentage of account records with all fields exactly matching the Dun & Bradstreet data set.
- **Matched outdated**—Percentage of account records with some fields differing from the Dun & Bradstreet data set.
- **Unmatched**—Percentage of account records that were not able to be matched to the Dun & Bradstreet data set.

Important: If your Unmatched percentage seems unusually high, it's possible that you aren't using the standard fields on which we match. To request a custom assessment of your data, contact your Salesforce account manager.

Customer Segmentation

Customer segmentation gives you detailed breakdowns by industry, geography, employee count, and annual revenue. The Customer Segmentation charts provide a graphic view of the potential fields for which Data.com can provide more up-to-date and accurate data.



- **Industry**—Number of accounts in the top five industries as identified by the two-digit SIC code.
- **Geography**—Number of accounts in a specific geographic region. Geographic regions are based the Dun & Bradstreet primary billing address for the company.
- **Revenue**—Number of accounts with an annual revenue based on Dun & Bradstreet annual sales volumes.
- **Employee Count**—Number of accounts that have a total number of employees based on Dun & Bradstreet employee numbers.

Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability.

IN THIS SECTION:

[Account Insights No Longer Gets News from Yahoo](#)

For most accounts, we provide insights from our own news processing platform, which collects news from various sources. We've replaced Yahoo with other third-party sources. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

[Person Accounts Has a Separate Page in the Lightning App Builder](#)

Person accounts and business accounts now each has its own page with its own unique components. However, person account pages can't be edited...yet.

[Activity Timeline Display No Longer Controlled by Related Lists](#)

You no longer have to include related lists in your object layouts to display next steps and past activity in the activity timeline. Lightning Experience displays the timeline regardless of the layout.

[Customize Your Related List Sorting Preferences in Lightning Experience](#)

The related list sorting preferences that users set in Salesforce Classic now stick around when they switch to Lightning Experience or use the Salesforce1 mobile app. Even better, users can now adjust their related list sorting directly from Lightning Experience, so they can see their data in the new interface just the way they want. And the cherry on top—sorting preferences set in Lightning Experience are picked up the next time the user switches to Salesforce Classic or accesses Salesforce1. Consistency never felt so good! This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

[Preview All Your Related Lists in Lightning Experience](#)

We all know that related list previews make life easier. Now you can preview all your related lists. Previously, you could preview only the first eight lists in Lightning. This feature is available in Lightning Experience only.

[Spell Checker Removed from Activities](#)

We've removed **Enable Spell Checker on Tasks and Events** from Activities Settings, and the Salesforce spell checker is no longer available when users create or edit events or tasks. We recommend using the spell checker in your browser instead. This feature was available in Salesforce Classic.

[Verify Your Security Protocol to Avoid Service Interruptions While Using Salesforce for Outlook](#)

Get access to important details about TLS 1.0 disablement.

[Highlights Panel Shows off More Fields](#)

Ever wish the highlights panel would show more of the fields you've customized in your compact layouts? Well, you're in luck! Starting in Summer '16, the highlights panel shows up to the first seven of the fields from the compact layout of that entity. Previously, the highlights panel only showed up to the first five fields. This feature is available in Lightning Experience only.

[Change to Record Ownership Flow During Lead Conversion](#)

There is a change in behavior when a user converts a lead into a new account, contact, or opportunity and assigns that new record to a separate user. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 app.

[Import My Accounts and Contacts Wizard to Retire in Winter '17](#)

The Import My Accounts and Contacts wizard is scheduled for retirement in all Salesforce orgs as of Winter '17. All points of access from within Salesforce Classic and Lightning Experience are going to direct users to the Data Import Wizard instead. For more information, see "[Import My Accounts and Contacts Retirement in Winter '17.](#)"

Account Insights No Longer Gets News from Yahoo

For most accounts, we provide insights from our own news processing platform, which collects news from various sources. We've replaced Yahoo with other third-party sources. This feature is available in Lightning Experience and all versions of the Salesforce1 app.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

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EDITIONS

Available in: **Developer** Edition

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SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

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EDITIONS

Available in all editions

Same as in Salesforce Classic, sorting in Lightning Experience is available on most related list columns, but is disabled for a few columns. To see if it's possible to sort by a column, hover over the column's heading and look for a downward arrow.

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EDITIONS

Available in Salesforce Classic in: **All** Editions

SEE ALSO:

[Salesforce Spell Checker is Replaced by Browser-Based Spell Check](#)

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Learn how to prepare computing environments so that your reps can [continue using Salesforce for Outlook after TLS 1.0 disablement](#).

Review our [disablement timeline](#).

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Change to Record Ownership Flow During Lead Conversion

There is a change in behavior when a user converts a lead into a new account, contact, or opportunity and assigns that new record to a separate user. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 app.

Previously, in Spring '16 and earlier, upon creation of the new record, the system first assigned it to the user performing the lead conversion. The system then completed the conversion process by reassigning the new record to the separate user.

This scenario had effects on workflows and APEX code.

- Workflow logic triggered by record creation that evaluates whether that separate user is the record owner would fail, because the record is first assigned to the user performing the conversion.
- For customers who use a private sharing model for Accounts, Contacts, or Opportunities, APEX logic that accesses the new record during lead conversion would succeed, because the new account is first owned by the user performing the conversion.

In Summer '16, the system now immediately assigns the new account, contact, or opportunity to the separate user chosen by the user who is converting the lead. The new record is never owned by the user performing the conversion.

This change affects workflows and APEX code.

- Workflow logic triggered by record creation that evaluates whether that separate user is the record owner will succeed, because that user is the first and only owner.
- For customers who use a private sharing model for Accounts, Contacts, or Opportunities, APEX logic that accesses the new record during lead conversion will fail, because the record is not owned by the user performing the conversion.

For example, let's say Steve converts a lead to an account and assigns that new account to Michelle during the conversion. A workflow triggered by account record creation that evaluates whether Michelle is the account owner will succeed. However, with a private sharing model, APEX code that tries to access the new account record during the conversion process will fail, because Steve is not the owner of the new account record.

Import My Accounts and Contacts Wizard to Retire in Winter '17

The Import My Accounts and Contacts wizard is scheduled for retirement in all Salesforce orgs as of Winter '17. All points of access from within Salesforce Classic and Lightning Experience are going to direct users to the Data Import Wizard instead. For more information, see "[Import My Accounts and Contacts Retirement in Winter '17](#)."

EDITIONS

Available in: **All** Editions except Database.com

Analytics

Drive business decisions with data and analysis from Salesforce Reports and Dashboards and Wave Analytics.

IN THIS SECTION:

[Reports and Dashboards in Lightning Experience: More Charts, Feeds, Export Reports](#)

Do more with Lightning Experience reports and dashboards. Visualize data in a bunch of newly supported chart types. Collaborate with others via feeds on reports and dashboards. Export reports to `.xls` and `.csv` files. And identify reports used by dashboard components to more effectively manage your org's reports and dashboards.

[Wave Analytics: Take Data Analysis to the Next Level](#)

This release brings a host of enhancements, including new Trailhead modules, full packaging support, extensive collaboration features, new chart types (maps!), more precise control over dashboard design, more frequent data refreshes, and additional SAQL and REST API features.

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EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



IN THIS SECTION:

[Dress up Your Data with New Charts in Lightning Experience](#)

We've added a bunch of new chart types to Lightning Experience: funnel, scatter, combo, and cumulative line charts. Also, table charts now show totals in Lightning Experience dashboards (after you set them up in the Salesforce Classic component editor).

[Collaborate with Others on Report and Dashboard Feeds in Lightning Experience](#)

Feeds are now available on reports and dashboards in both Lightning Experience and Salesforce Classic.

[Export Reports as Files from Lightning Experience](#)

Now you can export reports from both Lightning Experience and Salesforce Classic.

[Filter Reports by Clicking on Charts in Lightning Experience](#)

While reading a report, click a report chart grouping to filter the report.

[Undo and Redo Actions in the Lightning Experience Dashboard Designer](#)

Everybody makes mistakes. Worry not, mistakes are easily corrected. At least, they are in the Lightning Experience dashboard designer thanks to the undo and redo buttons.

[Combine Small Groupings to Keep Donut and Funnel Charts Readable in Lightning Experience](#)

To ensure that Lightning Experience donut and funnel charts are human-readable, combine small groupings into one.

[Use SOQL to Identify Reports Used by Dashboard Components](#)

Run a SOQL query to identify which dashboard components use a report that you're trying to delete. Then reconcile them so you can proceed with the deletion. Requires the user permission "Manage All Private Reports and Dashboards." Available in API version 37.0 and later.

[Sort Records in Reports and Dashboards by Encrypted Fields](#)

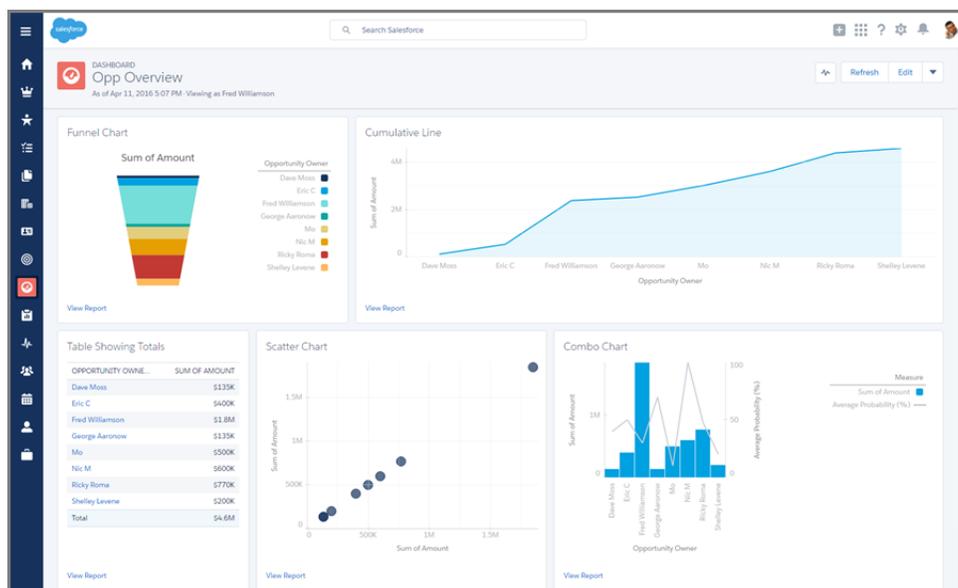
Keeping your Salesforce data secure doesn't mean you can't effectively report on it. Previously, if a field was encrypted, it couldn't be used to sort the records in a report or a dashboard. Now it can! This feature is available in both Lightning Experience and Salesforce Classic.

[Standard Users Have Access to Their Login History](#)

Standard users now have access to the login history fields for report filtering. Users can also add login history fields to a report. However, when users add login history fields to a report, they see only their login history data, not data for other users.

Dress up Your Data with New Charts in Lightning Experience

We've added a bunch of new chart types to Lightning Experience: funnel, scatter, combo, and cumulative line charts. Also, table charts now show totals in Lightning Experience dashboards (after you set them up in the Salesforce Classic component editor).

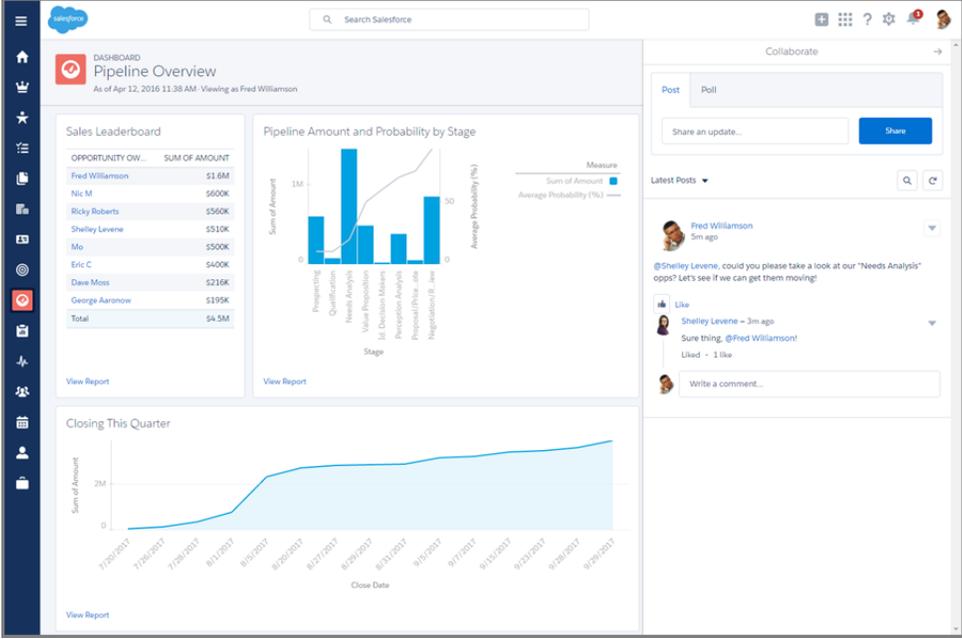


Funnel charts are available in both reports and dashboards. Scatter, combo, cumulative line, and table charts are available only in dashboards.

Collaborate with Others on Report and Dashboard Feeds in Lightning Experience

Feeds are now available on reports and dashboards in both Lightning Experience and Salesforce Classic.

When Feed Tracking is enabled for Reports and Dashboards, click  while viewing a report or dashboard to open the feed. Then, mention coworkers, post questions, and make observations about your Salesforce data directly from a report or dashboard.



The screenshot shows a Salesforce dashboard titled "Pipeline Overview" as of Apr 12, 2016 11:38 AM, viewed as Fred Williamson. The dashboard contains three main reports:

- Sales Leaderboard:** A table showing the top sales opportunities by amount.

OPPORTUNITY OW...	SUM OF AMOUNT
Fred Williamson	\$1.6M
Nic M	\$600K
Ricky Roberts	\$560K
Shelley Levene	\$510K
Mo	\$500K
Eric C	\$400K
Dave Moss	\$216K
George Aaronow	\$199K
Total	\$4.5M
- Pipeline Amount and Probability by Stage:** A combination bar and line chart showing the sum of amount (bars) and average probability (%) (line) across various pipeline stages.
- Closing This Quarter:** A line chart showing the cumulative sum of amount over time from 7/1/2015 to 6/30/2016.

On the right side, a "Collaborate" panel is open, showing a feed of comments. The latest post is from Fred Williamson, mentioning Shelley Levene and asking for help with "Needs Analysis" opps. There are also "Like" and "Write a comment..." options.

Export Reports as Files from Lightning Experience

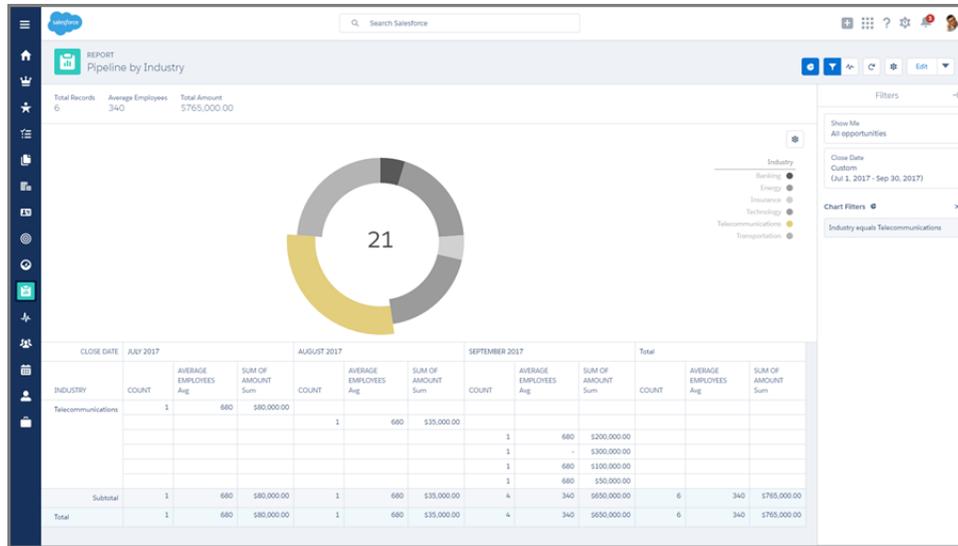
Now you can export reports from both Lightning Experience and Salesforce Classic.

When you need to work with report data in a dedicated tool, such as a spreadsheet, export report data as a Microsoft® Excel® (.xlsx) or comma-separated values (.csv) file. From a list view or while viewing a report, click  > **Export**, then choose encoding and file type.

Filter Reports by Clicking on Charts in Lightning Experience

While reading a report, click a report chart grouping to filter the report.

Your Pipeline by Industry report gives a useful overview of your opportunities, but what if you only want to view opportunities in the telecommunications industry? In the chart legend, click **Telecommunications**. Or, on the chart, click the chart segment that represents the telecommunications industry. The report then filters to show only opportunity records from the telecommunications industry. Note how a new filter appears under the Chart Filters heading in the filter panel.



To clear the filter, click the telecommunications grouping in the chart a second time. Or, remove the corresponding chart filter from the Filters panel.

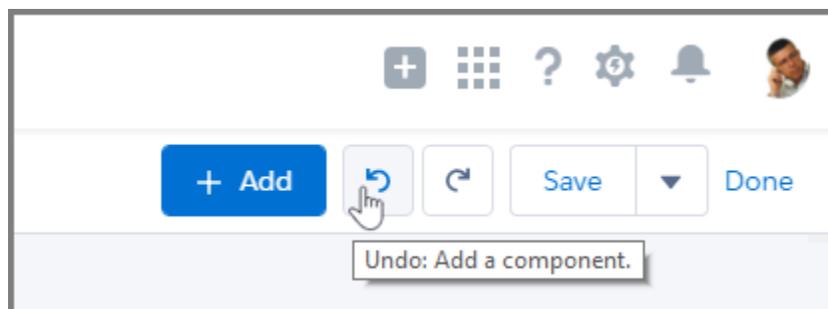
Take note of these chart filter limitations:

- You can't save chart filters.
- Line charts don't support chart filters.
- On stacked bar charts, you can only create chart filters by clicking stacked chart segments. Clicking groupings in the legend doesn't work.
- Chart filters reset after editing a report, changing report settings, or sorting columns.
- If a report has more than 2,000 rows, chart filters only filter the returned 2,000 rows.

Undo and Redo Actions in the Lightning Experience Dashboard Designer

Everybody makes mistakes. Worry not, mistakes are easily corrected. At least, they are in the Lightning Experience dashboard designer thanks to the undo and redo buttons.

To undo an action, click . To redo an action, click . Problem solved.

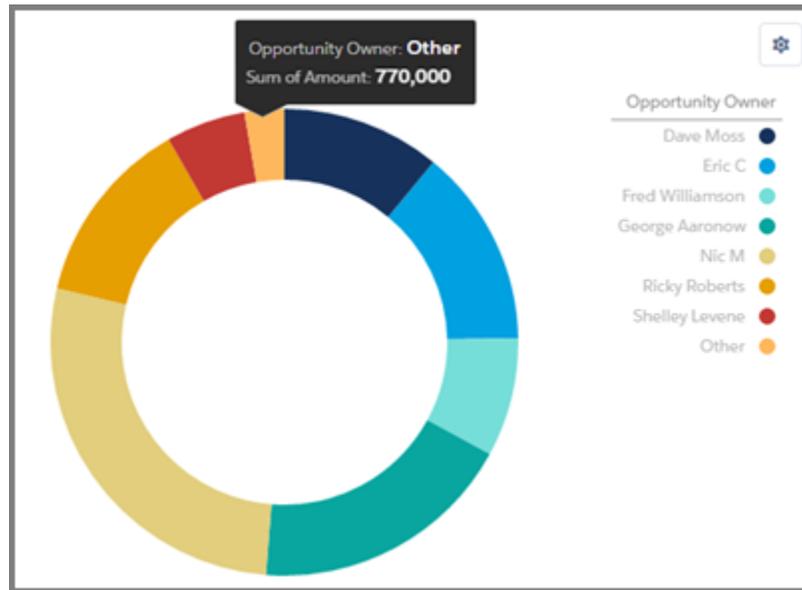


As a bonus, if you hover over the  or  button, we let you know what action is undone or redone before you click.

Combine Small Groupings to Keep Donut and Funnel Charts Readable in Lightning Experience

To ensure that Lightning Experience donut and funnel charts are human-readable, combine small groupings into one.

Enable the Salesforce Classic setting **Combine Small Groups into "Others"**, which is set from the Salesforce Classic chart editor. When enabled, groupings that comprise less than 3% of the total are combined a single grouping named "Other."



Use SOQL to Identify Reports Used by Dashboard Components

Run a SOQL query to identify which dashboard components use a report that you're trying to delete. Then reconcile them so you can proceed with the deletion. Requires the user permission "Manage All Private Reports and Dashboards." Available in API version 37.0 and later.

Say that Sarah, after many years, has retired and left the company. As Salesforce admin, part of your job is removing the reports saved in Sarah's private folder. Running a SOQL query using the `allPrivate` scope gives you access to Sarah's private reports. But what if you can't delete one report because it's used by dashboard components? Previously, it was a challenge to identify which dashboard components used Sarah's private reports. Now, a SOQL query does the trick.

First, run a SOQL query on the `DashboardComponent` sObject. In this example, the report with the Id `00OR0000000PBZZMA4` is a report saved in Sarah's private folder.

```
SELECT Id, DashboardId, CustomReportId FROM DashboardComponent USING SCOPE allPrivate WHERE CustomReportId = '00OR0000000PBZZMA4'
```

The query returns a list of dashboard components that use Sarah's private report as a source. With this list in hand, you can quickly account for the report's associated dashboard components and then delete the report.

Sort Records in Reports and Dashboards by Encrypted Fields

Keeping your Salesforce data secure doesn't mean you can't effectively report on it. Previously, if a field was encrypted, it couldn't be used to sort the records in a report or a dashboard. Now it can! This feature is available in both Lightning Experience and Salesforce Classic.

 **Note:** This only works for reports and dashboards.

SEE ALSO:

[Shield Platform Encryption](#)

Standard Users Have Access to Their Login History

Standard users now have access to the login history fields for report filtering. Users can also add login history fields to a report. However, when users add login history fields to a report, they see only their login history data, not data for other users.

If an admin previously created a report that filters by login history fields, standard users are now restricted to seeing rows that pertain to their own login history. In the past, if an admin created a report that filters by login history fields, a standard user saw rows for other users.

Wave Analytics: Take Data Analysis to the Next Level

This release brings a host of enhancements, including new Trailhead modules, full packaging support, extensive collaboration features, new chart types (maps!), more precise control over dashboard design, more frequent data refreshes, and additional SAQL and REST API features.

EDITIONS

Available for an extra cost in **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in **Developer Edition**.



IN THIS SECTION:

[Take Trailhead to Learn All About Wave Apps](#)

Want to learn how our prebuilt apps can help you go faster with Wave Analytics? Take our new trail, *Accelerating Analytics with Wave Apps*.

[A Whole New Wave of Apps](#)

Wave supports packaging! You can now include Wave assets in packages, and developers, partners, and ISVs can deploy, license, and manage Wave apps on AppExchange. This lays the foundation for a whole new ecosystem. A wave of Wave apps is coming!

[Extend Wave Everywhere](#)

New features make collaborating on Wave easier. Hold conversations right inside a dashboard with annotations. Download and share lenses and widgets in different formats. Present your analysis in full-screen directly in Wave, and share Wave assets more easily through additional enhancements.

[Explore, Visualize, and Design](#)

Gain more control over your visualizations with new chart types, refinements to the flex dashboard designer (beta), and enhancements to the explorer.

[Accelerate Analytics With Wave Apps](#)

We've expanded our prebuilt apps offering with Service Wave to bring the power of Wave Analytics to the Service Cloud.

[Integrate Data](#)

Refresh your Wave data more often with multiple dataflow runs per day. Simplify analysis with better hierarchy support.

[Develop on the Wave Platform](#)

Developing on the Wave platform just got a lot more powerful, with new SAQL functions and additional REST API support.

Take Trailhead to Learn All About Wave Apps

Want to learn how our prebuilt apps can help you go faster with Wave Analytics? Take our new trail, *Accelerating Analytics with Wave Apps*.

Accelerating Analytics with Wave Apps

Learn how out-of-the-box apps can help you go faster with Wave Analytics.

Intermediate | Admin

Trail

Modules and projects (3)

Wave Apps Basics

Find out what Wave Analytics prebuilt apps can do for you and how you can create and customize them.

Module

Show 3 units
1 hr

Sales Wave App

Learn how to put Sales Cloud data to work through the prebuilt Sales Wave app's dashboards.

Module

Show 5 units
2 hrs

Basic Wave Dashboard Customization

Reimagine the user experience of dashboards for prebuilt apps like Sales Wave or the Wave platform.

Module

Show 6 units
2 hrs 25 mins

Through hands-on exercises, learn how to:

- Set up users and permissions for prebuilt apps.
- Create apps quickly and iteratively.
- Navigate Sales Wave dashboards to see how your business is doing.
- Perform common customizations to enhance dashboards, whether they're part of your own app or a prebuilt Wave app.

Head out on the [Accelerating Analytics with Wave Apps](#) trail today, and start earning your Wave apps badges!

A Whole New Wave of Apps

Wave supports packaging! You can now include Wave assets in packages, and developers, partners, and ISVs can deploy, license, and manage Wave apps on AppExchange. This lays the foundation for a whole new ecosystem. A wave of Wave apps is coming!

Wave assets can be packaged in the same way as standard Salesforce components, using the same tools. Your apps, dashboards, lenses, datasets, and dataflows can be easily distributed to your users.



But there's more! Partners such as ISVs and OEMs can deploy Wave assets as managed apps. Packaging leverages Salesforce and Wave metadata, so Wave apps are seamlessly integrated with Force.com; there is no dividing line. Upgrade, delete, and deprecate operations are supported. Change sets honor Wave metadata too, making it easy to send customizations and Wave assets from one Salesforce org to another, like from Sandbox to production.

Partners who wish to make their Wave app available for sale and/or installation can do so by publishing to AppExchange. Customers can browse these packages on AppExchange and install them into their orgs. Have an amazing idea for an analytical app? Build your business on Wave!

Your AppExchange offerings can be managed via the License Management Application, where you can specify the licensing options, and create lead and license records for each install of your package. Partners can control the usage of their Wave apps by the number of users. Administrators can assign these licenses to the users, subject to the terms of the license.

 **Note:** Partners wishing to publish Wave apps on appexchange should talk to their PAM (Partner Account Manager) and TE (Technical Evangelist) contacts at Salesforce.

Refer to the [Wave Migration, Packaging and Distribution](#) help topic.

The following table shows the Wave components that are available in a managed package, and whether each is updateable, or can be deleted.

Component	Upgradeable	Subscriber Deletable	Developer Deletable	Protectable	IP Protection
Apps	Yes	No	Yes	No	No
Dashboards	Yes	No	Yes	No	No
Lenses	Yes	No	Yes	No	No
Datasets	Yes	No	Yes	No	No
Dataflows	Yes	No	Yes	No	No

Key to column headings:

Upgradeable

Some components are updated to a newer version when a package is upgraded.

Subscriber Deletable

A subscriber or installer of a package can delete the component.

Developer Deletable

A developer can delete some components after the package is uploaded as `Managed - Released`. Deleted components are not deleted in the subscriber's organization during a package upgrade.

Protectable

Developers can mark certain components as protected, so they can't be referenced by components elsewhere.

IP Protection

Intellectual property protection, such as obfuscation.

There are some good practices and points to be aware of when packaging Wave assets.

- Wave Admin permissions are required to create a package, but not for deployment, which requires only Salesforce admin permissions.
- There is no spidering between datasets and dataflows, meaning there is no dependency following. When packaging both, they must be added manually. If they are not, an error appears during deployment. The same is true for change sets - when packaging both datasets and dataflows, add them manually.
- Images don't render when deploying a dashboard that uses an image widget that references an image file not available on the target org. You must manually upload the image, and the document ID of the image file in the image widget must be updated. The user can't save the dashboard in the target with an invalid document ID, but they can still view and edit it.
- If a dashboard you're deploying has a link widget pointing to another dashboard that exists in the target org, you must manually update the link reference to point to the right one. If the linked dashboard doesn't exist in the target org, you'll see an error message. Either deploy the linked dashboard too, or re-create the linked dashboard in the target org. Update the link widget to point to the linked dashboard.
- Take care when packaging dataflows. Invalid schema overrides, and unsupported or illegal parameters will be removed (for example, `Type = dim` is no longer supported, it's now `Type = text`). Comments in JSON will be removed. Nodes might appear in a different order.

Extend Wave Everywhere

New features make collaborating on Wave easier. Hold conversations right inside a dashboard with annotations. Download and share lenses and widgets in different formats. Present your analysis in full-screen directly in Wave, and share Wave assets more easily through additional enhancements.

IN THIS SECTION:

[Collaborate on Flex Dashboards with Annotations](#)

Annotate dashboard widgets with comments posted in the dashboard and in Chatter. With annotations, you can hold more efficient conversations about your data and how it's visualized, because the dashboard is right there for reference.

[Download the Data from Explorations as .Csv or Excel Files](#)

Export lens explorations and dashboard widgets as images, or as Microsoft® Excel® (.xls) or comma-separated values (.csv) files. This feature downloads the results of a displayed query (or step). Now you can share explorations and filtered data in other useful formats.

[No More Slides: Present Live Dashboards and Lenses](#)

Run meetings directly from Wave with the new full-screen presentation mode. By presenting Wave assets instead of slides with static images, you have real-time access to your data, and you can showcase dynamic visualizations.

[Share Unsaved Lenses and Private App Assets](#)

Propel data-driven collaboration with more sharing options. Now you can share unsaved lenses, as well as dashboards and lenses saved in your Private App.

[Include Sharing Options in Embedded Dashboards](#)

Share Wave insights from any Salesforce interface, whether Classic, Lightning Experience, or Communities. Set up any embedded dashboard to include a Share icon that opens the Share dialog. The sharing options from embedded dashboards are Post to Feed and Download.

Embed Wave Dashboards in Lightning Pages (Generally Available)

Provide an interactive visualization of your data by adding a Wave Analytics dashboard component to a Lightning record page. Users can drill in and explore the dashboard within the frame on the Lightning page or in a Wave Analytics window. This feature is available in Lightning Experience only.

Share Wave with Communities More Easily and Securely

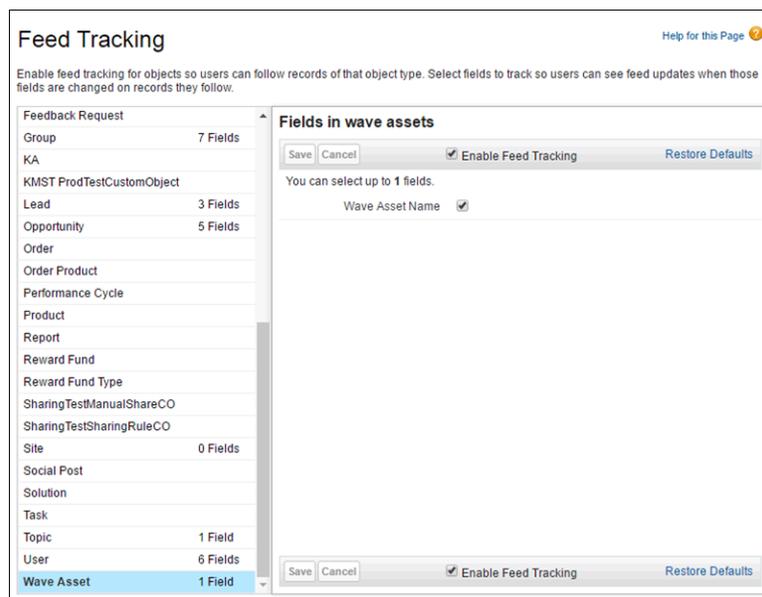
Enhanced sharing with communities reveals at a glance whether an app is shared externally. And you can easily check, and change, the sharing status of apps.

Collaborate on Flex Dashboards with Annotations

Annotate dashboard widgets with comments posted in the dashboard and in Chatter. With annotations, you can hold more efficient conversations about your data and how it's visualized, because the dashboard is right there for reference.

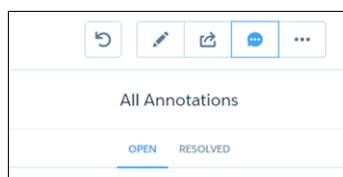
 **Note:** Annotations are supported only in flex dashboards (beta).

Enable annotations by clicking the **Wave Asset** object and selecting **Enable Feed Tracking** in the Chatter Feed Tracking Setup.



The annotations icon () appears when you hover over the upper-right corner of a widget. Click the icon to annotate a widget. Widgets with annotations show a blue square with the number of open annotations.

Alternatively, click the speech bubble icon in the dashboard control bar to open the Annotations panel.



Wave saves both open and resolved annotations. And if you delete a widget, its open annotations are saved as detached annotations. You can access detached annotations from the blue circle at the bottom of the dashboard.

Click an annotation to open it for comments.

The screenshot shows a Salesforce Wave dashboard titled "Customer Success". On the left, there are three donut charts labeled "Customer Success", "Customer Success", and "Standard". A blue box labeled "1" highlights the first chart. In the center, there is a table with columns "User Type", "Role Name", and "Count". A blue box labeled "2" highlights an "Annotate" button in the top right corner of the table. On the right, an "Annotation" panel is open, showing a comment from "Customer Success - Admin User" posted 10m ago: "@Team, here's the chart I mentioned." Below the comment are "Like" and "Comment" buttons, and a "Resolve" button at the bottom.

User Type	Role Name	Count
Cust...ess	CSP...ser	1
Pow...ess	CSP...ive	1
Chat...ser		1
Standard	R1	5
	R11	2
	R111	2
	R12	2
	R2	2
Shari...ole		7
Shari...ole		6

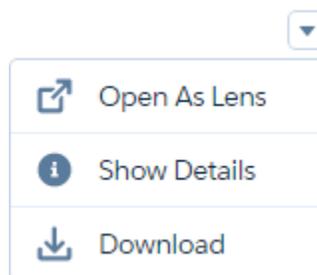
Wave dashboard annotations are also natively integrated with Chatter, so users are automatically notified when they receive comments. Click in Chatter and go straight to the dashboard in Wave. Although you can @mention anyone in your org, the security you have set up controls access to the dashboard.

Download the Data from Explorations as .Csv or Excel Files

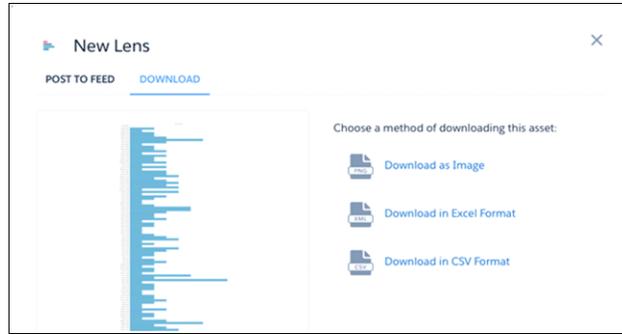
Export lens explorations and dashboard widgets as images, or as Microsoft® Excel® (.xls) or comma-separated values (.csv) files. This feature downloads the results of a displayed query (or step). Now you can share explorations and filtered data in other useful formats.

 **Note:** This feature isn't supported for flex dashboards (beta).

To set up, assign users a permission set that includes `Download Wave Analytics Data`. Users with the permission see download options when they select **Download** from a dashboard widget.



Or, from a lens, select **Share** and then **Download**.



SEE ALSO:

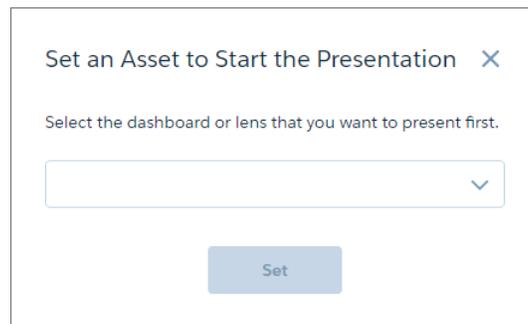
[IdeaExchange: Why Can't I Export What I'm Seeing on Each Screen?](#)

[IdeaExchange: Ability to Export Data from Dataset in CSV Format](#)

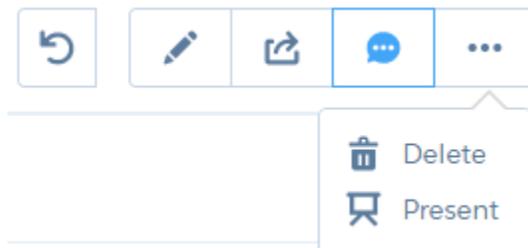
No More Slides: Present Live Dashboards and Lenses

Run meetings directly from Wave with the new full-screen presentation mode. By presenting Wave assets instead of slides with static images, you have real-time access to your data, and you can showcase dynamic visualizations.

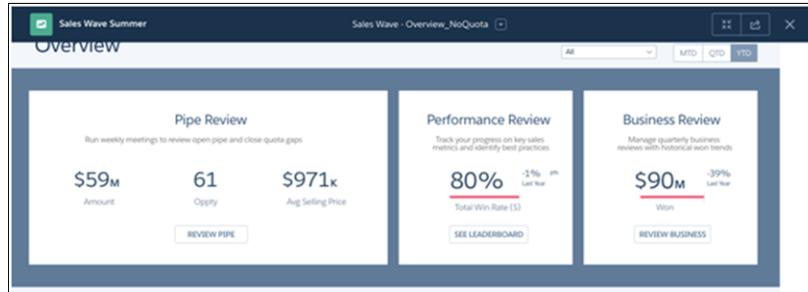
Start a presentation by clicking **Present** in an app, and setting the dashboard or lens to present first.



Or you can start presenting directly from a dashboard or lens.



During the presentation, you can use all of the Wave functionality, such as filtering, faceting, and linking to other assets. And it's simple to navigate to other dashboards and lenses using a mouse or keyboard. The presentation control bar appears when you hover at the upper edge of the window.



Select the next asset to present from the drop-down menu in the center of the control bar.

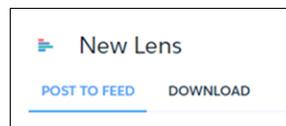


The Full Screen toggle () changes the window size without exiting the presentation.

Share Unsaved Lenses and Private App Assets

Propel data-driven collaboration with more sharing options. Now you can share unsaved lenses, as well as dashboards and lenses saved in your Private App.

When a lens isn't saved, it doesn't have a URL and so you can't give a link to others to see your beautiful work. But now there are three ways to share an unsaved lens: post it as an image in Chatter, download it as an image, or export lens data in .csv or Microsoft Excel format. Click the Share icon at any time while developing a new lens or editing a previously saved lens.

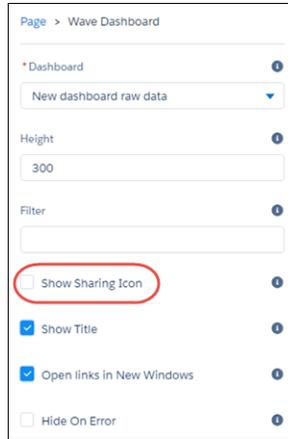


In addition, you can now share assets that are saved in My Private App. Sharing includes the Post to Feed, Get URL, and Download options.

Include Sharing Options in Embedded Dashboards

Share Wave insights from any Salesforce interface, whether Classic, Lightning Experience, or Communities. Set up any embedded dashboard to include a Share icon that opens the Share dialog. The sharing options from embedded dashboards are Post to Feed and Download.

With the new `showSharing` attribute, you can specify whether an embedded Wave dashboard offers the Share icon. Set `showSharing` to true when adding a Wave dashboard to a Visualforce page, or select **Show Sharing Icon** in the enhanced page layout editor or Lightning App Builder.

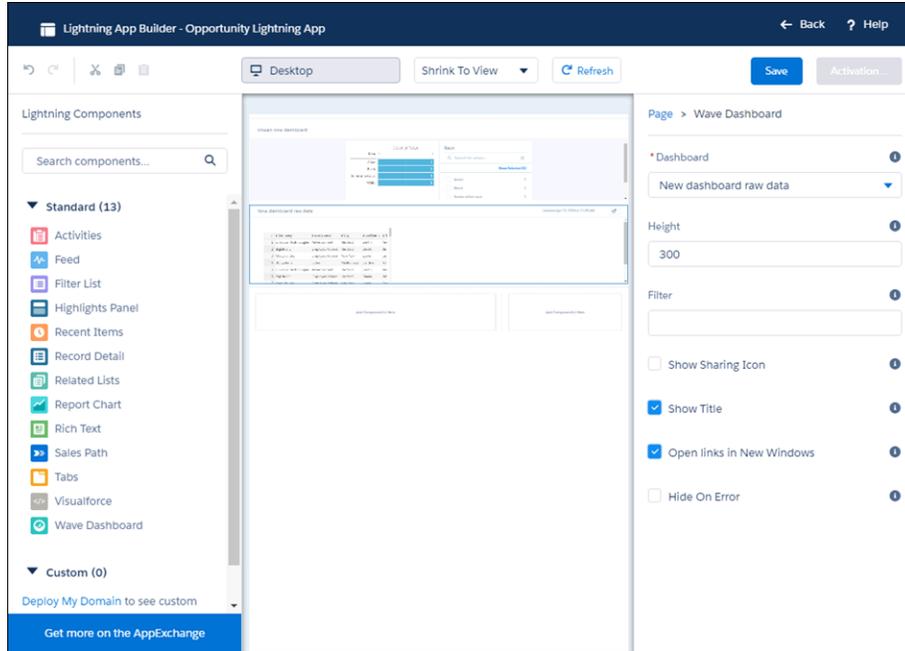


The Share icon () appears next to the Link icon when users hover in the upper right corner of the dashboard. Now your users with embedded dashboards can post to Chatter and download data, too!

Embed Wave Dashboards in Lightning Pages (Generally Available)

Provide an interactive visualization of your data by adding a Wave Analytics dashboard component to a Lightning record page. Users can drill in and explore the dashboard within the frame on the Lightning page or in a Wave Analytics window. This feature is available in Lightning Experience only.

To add a dashboard to your Lightning page, select the **Wave Dashboard** component and then select the dashboard to display.



Control the visibility of the dashboard's title and specify whether users can share the dashboard via the **Show Sharing Icon** option. With the **Open Links in New Windows** attribute, you can specify where links from the dashboard to other assets are opened. With the **Filter** attribute, you can use JSON to filter dataset fields at run time.

SEE ALSO:

[Lightning App Builder](#)

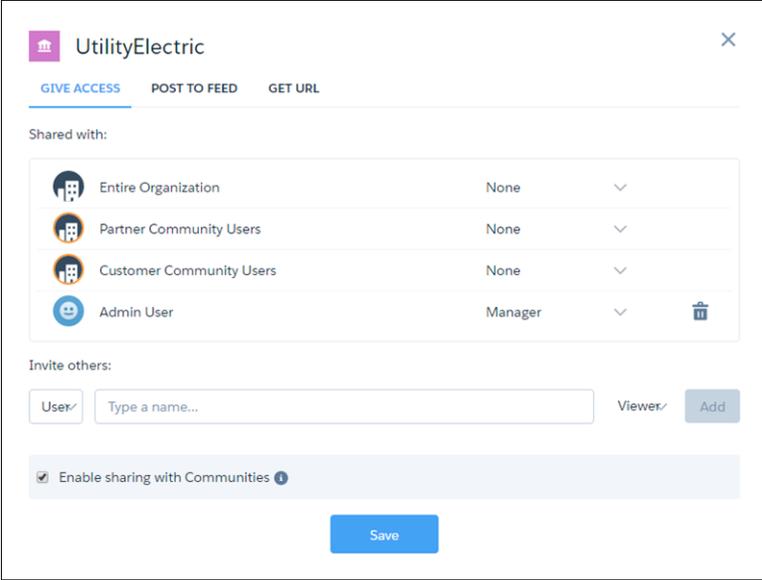
Share Wave with Communities More Easily and Securely

Enhanced sharing with communities reveals at a glance whether an app is shared externally. And you can easily check, and change, the sharing status of apps.

 **Note:** Only community members with a Customer Community Plus or Partner Community license can use this feature. This feature is supported in communities but not in portals.

You've set up your org and your community members with Wave Analytics for Communities. You've created Visualforce pages with embedded Wave dashboards, including creating tabs and adding them to your community. Now you're ready to make your beautiful and informative Wave dashboards accessible to community members.

From a Wave app, select **Share**. The new sharing dialog includes **Enable sharing with Communities**. If this option isn't selected, the app and its dashboards aren't accessible to community users and groups.



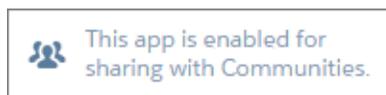
Shared with:		
	Entire Organization	None
	Partner Community Users	None
	Customer Community Users	None
	Admin User	Manager

Invite others:

User: Viewer:

Enable sharing with Communities ⓘ

After it's enabled, you can change the access for community partners and customers to **Viewer**. Enabled apps have the sharing with communities icon.



 **Important:** After the Summer '16 release, you'll have to manually select **Enable sharing with Communities** for currently shared apps.

SEE ALSO:

[Getting Started With Communities](#)

[Salesforce Help: Enable Wave Analytics for Communities](#)

[Salesforce Help: Add a Wave Analytics Dashboard to a Visualforce Page](#)

Explore, Visualize, and Design

Gain more control over your visualizations with new chart types, refinements to the flex dashboard designer (beta), and enhancements to the explorer.

IN THIS SECTION:

[New Chart Types Expand Wave Visualization Capabilities](#)

Our latest chart types—funnel and choropleth (map)—give you new ways to visualize data creatively in Wave dashboards. We've made both available through the Wave user interface and dashboard JSON.

[Enhancements to Flex Dashboard Designer \(Beta\)](#)

Quickly set up dashboards using new layout features and default settings that apply to all widgets.

[Other Enhancements in Wave Exploration and Dashboards](#)

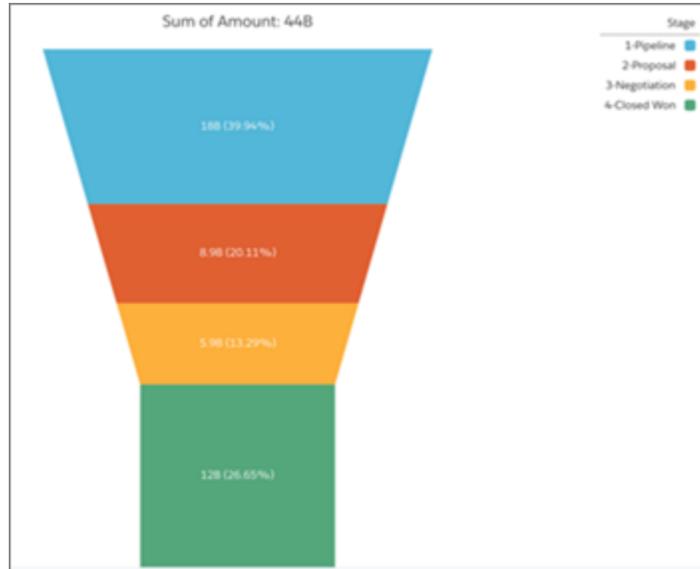
Check out these improvements to the Wave home page, explorer, and dashboards.

New Chart Types Expand Wave Visualization Capabilities

Our latest chart types—funnel and choropleth (map)—give you new ways to visualize data creatively in Wave dashboards. We've made both available through the Wave user interface and dashboard JSON.

Funnel

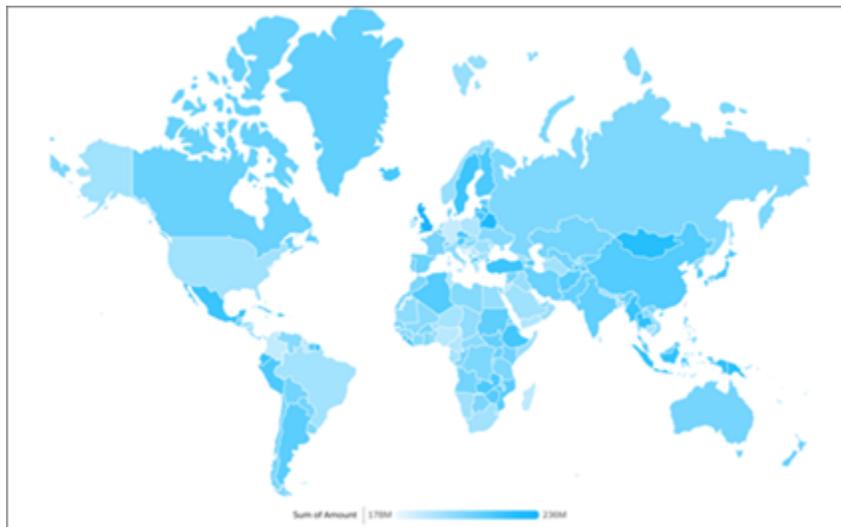
You can use the funnel chart to show how well your sales are going for a particular period. Other potential uses of funnel include identifying potential bottlenecks in the deal closing process.

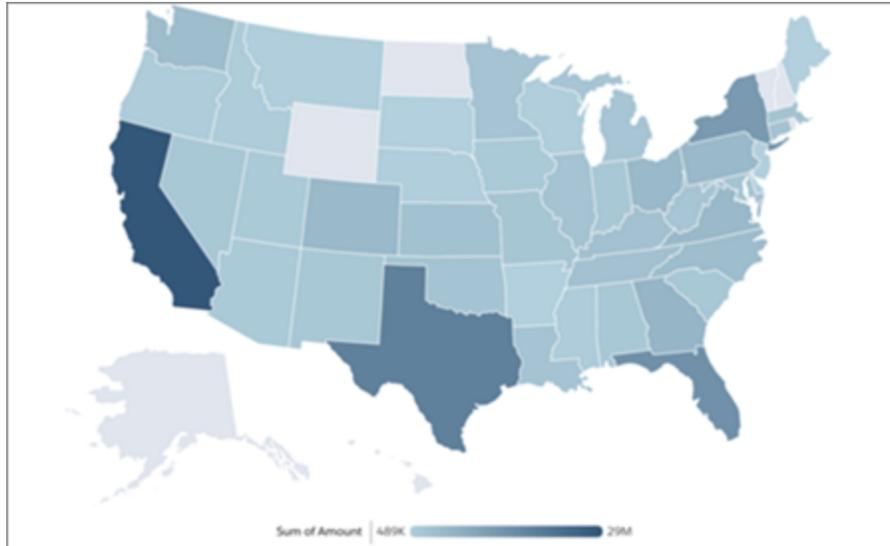


For implementation details about funnel charts, see the [Wave Analytics Dashboard JSON Guide](#).

Maps

Thematic maps, or choropleth maps, have areas shaded in proportion to the measurement of the data being displayed on the map, allowing for visual pop-out of high-value areas. Typical data to display in maps are population density or total sales. Our implementation supports a world map broken down by country and regions, and a United States map broken down by state.





For implementation details about thematic maps, see the [Wave Analytics Dashboard JSON Guide](#).

A pilot feature allowing for custom maps is available. With custom maps, you can upload GeoJSON definition files to create your own map visualizations. For example, this feature lets you create a map of the USA with custom regions, or to visualize data generated by a reservation system.

We provide the custom-maps feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Custom maps aren't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Enhancements to Flex Dashboard Designer (Beta)

Quickly set up dashboards using new layout features and default settings that apply to all widgets.

IN THIS SECTION:

[Create Widgets Faster with Step Cloning](#)

The flex designer (beta) offers a new way to create widgets by cloning existing lenses (now called "steps" in the designer). It's a time-saver when you've already put work into creating queries and you just want to build on them.

[Fit Widgets Better in Dashboards](#)

Widgets now have smaller default sizes in flex designer (beta). If needed, you can further shrink all widgets down to one column by one row.

[Create Clean Dashboards with a Background and Widget Spacing](#)

You can now set dashboard properties in flex designer (beta) to set spacing between the grid cells and apply a dashboard background. Add space between grid cells to space out widgets. To promote your corporate branding or create a theme, add a logo or color as the dashboard background.

[Easily Apply Consistent Backgrounds and Borders to Widgets](#)

To create a consistent look and feel in a dashboard, specify default background colors and borders for widgets in flex designer (beta). When you configure each widget's properties, you can specify whether to use the defaults or unique values.

Group Images Inside a Container for Easier Handling

In flex designer (beta), you can create an image widget and group it with other widget types inside a container widget. Grouping allows you to move the widgets all at once with the existing spacing, eliminating the need to realign widgets after moving them. Previously, you could only apply an image as the background of a container widget.

Instantly Update Widgets in a Dashboard

Selections in list, range, and date widgets that are expanded in the flex designer (beta) always instantly update other widgets. Unlike the previous release, you can no longer see nor set the Update Instantly property for these widgets to manually update other widgets.

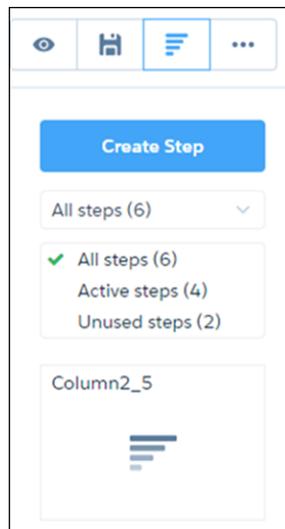
Get Familiar with Dashboard JSON Changes

The dashboard JSON contains more properties to support the new features in flex designer (beta). If you work with JSON while building dashboards, take note of the changes.

Create Widgets Faster with Step Cloning

The flex designer (beta) offers a new way to create widgets by cloning existing lenses (now called “steps” in the designer). It's a time-saver when you've already put work into creating queries and you just want to build on them.

Click a step to clone it. Modify the clone in the explorer, and save it with the steps available for use in that dashboard. If the step was created using SAQL, the clone opens in the SAQL editor instead of the explorer. Two types of steps can't be cloned: a static step and a Compare Table that has a SAQL query for one or more of its columns.



Note: Let's clarify the new word “step” in the flex designer. A dashboard widget consists of a step plus a visualization. The step is often a query that dynamically runs to show you different views of your data. The step can also be static values pulled from your data. Either way, it's different from a lens. A lens stands alone, while a step is only available in the dashboard designer. When you clip a lens for use in a dashboard, you're sending the step part to the designer.

Fit Widgets Better in Dashboards

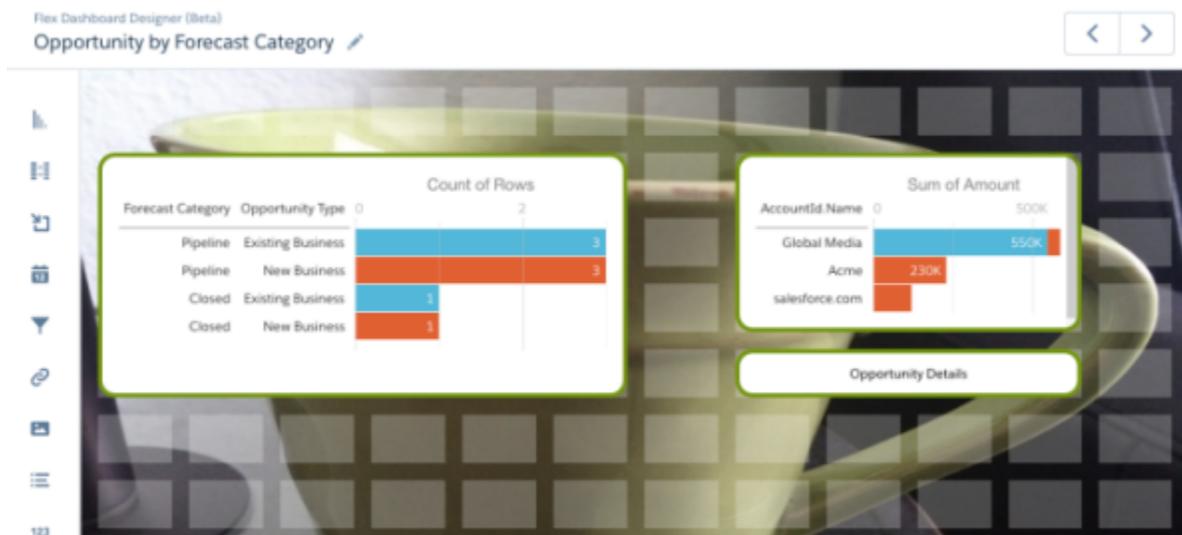
Widgets now have smaller default sizes in flex designer (beta). If needed, you can further shrink all widgets down to one column by one row.

The following table specifies the new default size for each widget type.

Widget Type	Default Size
Chart	3 columns, 5 rows
Compare Table	3 columns, 6 rows
Container	3 columns, 3 rows
Date	3 columns, 5 rows
Global Filter	2 columns, 1 row
Image	3 columns, 3 rows
Link	2 columns, 1 row
List	3 columns, 2 rows
Number	2 columns, 1 row
Range	3 columns, 1 row
Text	2 columns, 1 row
Toggle	2 columns, 1 row
Values Table	3 columns, 6 rows

Create Clean Dashboards with a Background and Widget Spacing

You can now set dashboard properties in flex designer (beta) to set spacing between the grid cells and apply a dashboard background. Add space between grid cells to space out widgets. To promote your corporate branding or create a theme, add a logo or color as the dashboard background.



To set dashboard properties, edit the dashboard in flex designer, click , and then select **Properties**. The Properties option doesn't appear when you preview a dashboard.

DASHBOARD PROPERTIES ✕

Background Color

▼

Background Image

015R0000000DCIP

Image Scale

Stretch ▼

Image Alignment

Horizontal

|—

+|

—|

Vertical

|—

+|

—|

Cell Spacing

Horizontal

0 ▼

Vertical

16 ▼

The following table provides a description of each dashboard property.

Property	Description
Background Color	Color of the dashboard background.
Background Image	The 15-character document ID of the image to apply as the dashboard's background. To ensure security, upload the image file to Salesforce as a document, and select the Externally Available Image option. The image doesn't show up in the widget if this option is not selected or the referenced document is not an image.
Image Scale	Scale that affects how the image appears in the dashboard. Default is Original, which shows the image in its original size.
Image Alignment (horizontal and vertical)	The alignment of the image in the dashboard background. For horizontal alignment, choose left, center, or right alignment. For vertical, choose top, center, or right alignment. Defaults are top and left alignments.
Cell Spacing (horizontal and vertical)	Spacing (in pixels) between cells in the dashboard grid. Default is 8 for horizontal and vertical spacing.

Easily Apply Consistent Backgrounds and Borders to Widgets

To create a consistent look and feel in a dashboard, specify default background colors and borders for widgets in flex designer (beta). When you configure each widget's properties, you can specify whether to use the defaults or unique values.

In Summer '16, you can set these properties for all widget types in the flex designer. Previously, you couldn't set them for chart, number, and toggle widgets.

To assign the defaults, edit the dashboard in flex designer, click , and then select **Properties**.

Widget Default Properties

Background Color



Border



Border Color



Border Width



Border Radius

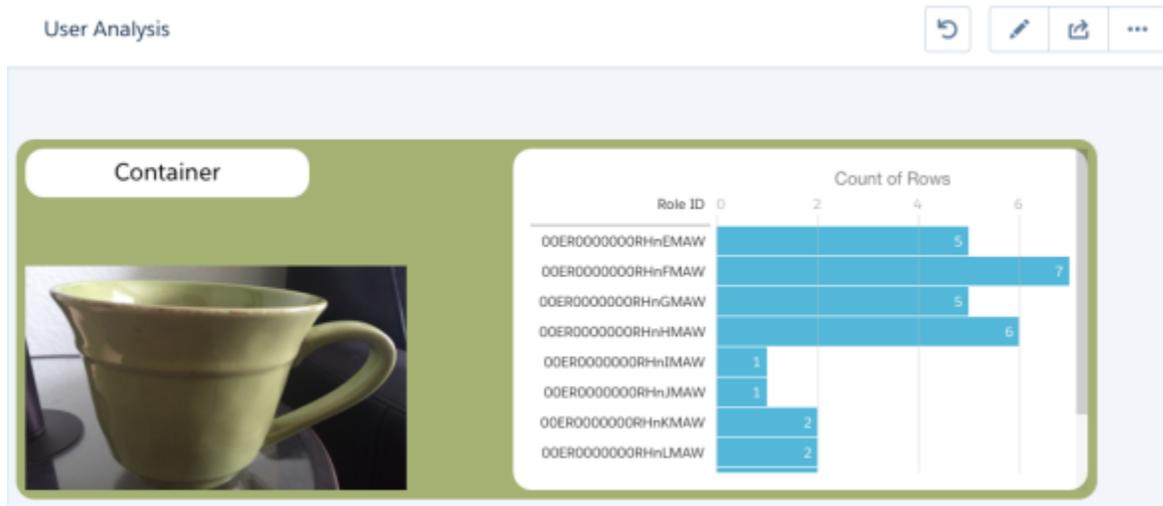


You can set default values for the following widget properties.

Property	Description
Background Color	Color of the widget's background. Default is white.
Border Color	Color of the widget's border. Default is black.
Border Width	Thickness of the border. The higher the value, the thicker the border. Default is 2.
Border Radius	Roundness of the border corners. The higher the value, the more rounded the corner. The default value is 0 (not rounded).

Group Images Inside a Container for Easier Handling

In flex designer (beta), you can create an image widget and group it with other widget types inside a container widget. Grouping allows you to move the widgets all at once with the existing spacing, eliminating the need to realign widgets after moving them. Previously, you could only apply an image as the background of a container widget.



In addition, you can also overlay images by applying them to the dashboard background, container background, and image widget inside the container.

To create an image widget:

1. In the dashboard, add the Image widget to the canvas and move it inside a container widget. All widgets in the container are grouped.
2. To access the image widget properties, click the Edit icon for the widget.
3. Set the following properties.

Property	Description
Background Image	The 15-character document ID of the image file to apply as the background. To ensure security, upload the image file to Salesforce as a document and select the Externally Available Image option. If the option is not selected, the document is not an image, or there is no corresponding document, no image appears. Default is null.
Image Scale	Indicates how to scale the image. Valid values are: Original (default), Stretch, Tile, Fit Width, or Fit Height.
Image Alignment: Horizontal	Indicates the horizontal alignment of the image in the widget. You can align left (default), center, or right.
Image Alignment: Vertical	Indicates the vertical alignment of the image in the widget. You can align top (default), center, or bottom.
Use Defaults	Widget inherits the default widget properties specified in the dashboard properties.
Background Color	Background color of the image widget. Default is white (#FFFFFF).
Border	Indicates which edges of the image widget have a border. Default is no border.
Border Color	Color of the image widget's border. Default is white (#FFFFFF).

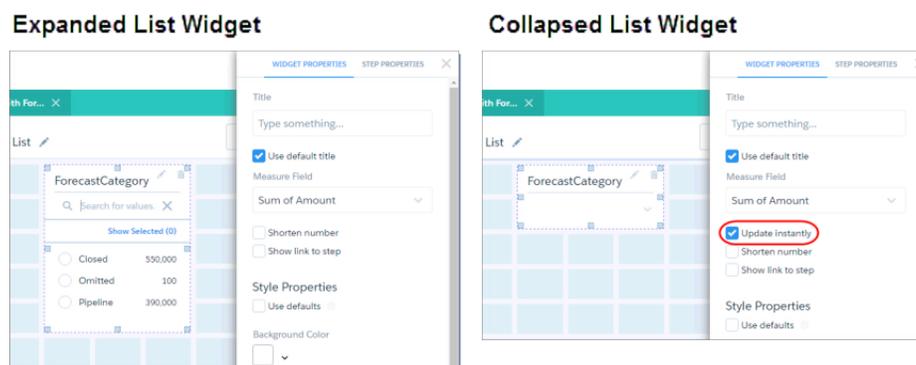
Property	Description
Border Radius	Roundness of the border corners. Valid values are: 0 (not rounded, default), 4, 8, and 16. The higher the value, the more rounded the corner.
Border Width	Thickness of the widget's border. Valid values are 1, 2 (default), 4, and 8.

- Save the change to the dashboard.

Instantly Update Widgets in a Dashboard

Selections in list, range, and date widgets that are expanded in the flex designer (beta) always instantly update other widgets. Unlike the previous release, you can no longer see nor set the Update Instantly property for these widgets to manually update other widgets.

-  **Note:** If these widgets are collapsed, the behavior is the same as before—the property is available. You can configure it for instantaneous or manual updates.



Get Familiar with Dashboard JSON Changes

The dashboard JSON contains more properties to support the new features in flex designer (beta). If you work with JSON while building dashboards, take note of the changes.

The dashboard JSON contains the following new sections.

- `gridLayoutStyle`—Contains settings for dashboard properties, such as background color and image, and cell spacing.
- `widgetStyle`—Contains the default settings for widget properties.

Image widget properties appear under “widgets.” The background color and border properties of images, or any widget for that matter, appear under “`gridLayoutStyle`.”

The following sample dashboard JSON shows the new JSON sections and image widget properties.

```
{ "label": "Business Overview",
  "description": "",
  "state": {
    "gridLayoutStyle": {
      "backgroundColor": "#44A2F5",
      "cellSpacingX": 4, "cellSpacingY": 4,
      "documentId": "015R000000DC1P",
      //dashboard properties
    }
  }
}
```

```

    "fit": "stretch",
    "alignmentX": "center",
    "alignmentY": "center"
  },
  "widgetStyle": { //default widget properties
    "backgroundColor": "#E6ECF2",
    "borderEdges": [ "all" ],
    "borderColor": "rgb(89, 128, 11)",
    "borderWidth": 4,
    "borderRadius": 16
  },
  "widgets": {
    "image_1": { //image widget properties
      "type": "image",
      "parameters": {
        "documentId": "015R0000000DC1P",
        "fit": "stretch",
        "alignmentX": "center",
        "alignmentY": "center"
      }
    }
  },
  "gridLayouts": [
    {
      "name": "desktop",
      "pages": [
        { "widgets": [
          {
            "name": "image_1",
            "row": 0,
            "column": 0,
            "colspan": 3,
            "rowspan": 3,
            "widgetStyle": { //image widget style properties
              "backgroundColor": "#2EC2BA",
              "borderEdges": ["all"],
              "borderColor": "#000000",
              "borderWidth": 4,
              "borderRadius": 16
            }
          }
        ]}
      ]}
    ]},
    "datasets": []
  }
}

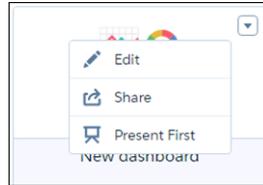
```

Other Enhancements in Wave Exploration and Dashboards

Check out these improvements to the Wave home page, explorer, and dashboards.

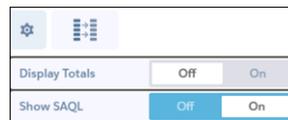
Action Menus on Assets

Quickly perform actions such as editing and sharing from the Wave home page. To access action menus, hover on asset tiles or to the right of assets in list view.



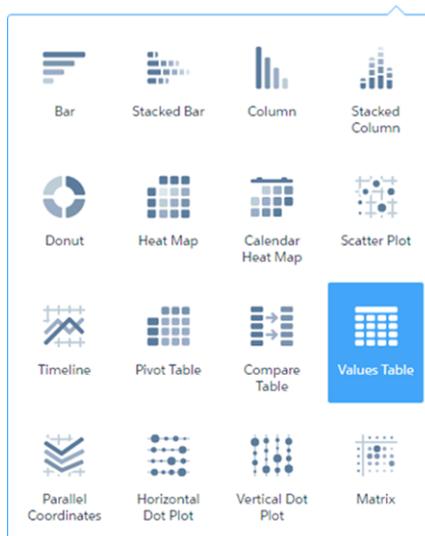
View the SAQL for All Columns in Compare Tables

Select Show SAQL to verify your compare table, or learn how to write a co-group query! The SAQL viewer shows the SAQL for all columns in a compare table. You can also more easily edit compare table SAQL during the step creation process in the flex designer (beta).



New Name for Raw Data Table

We've changed the name of the Raw Data Table to "Values Table" to be consistent across explorer and designer.



Perfectly Position and Fit Widgets in the Original Dashboard Designer

- Press CTRL+Arrow keys (for Windows) or CMD+Arrow keys (for Mac) to move a widget one pixel at a time. Like in the previous release, without CTRL or CMD, the arrow key moves the widget 10 pixels.
- Press CTRL+SHIFT+Arrow keys (for Windows) or CMD+SHIFT+Arrow keys (for Mac) to resize a widget by 1 pixel. Like in the previous release, press SHIFT+Arrow keys to resize the widget by 10 pixels.
- The minimum size of the box widget is 20x20 (in pixels). Previously, it was 130x10.

Accelerate Analytics With Wave Apps

We've expanded our prebuilt apps offering with Service Wave to bring the power of Wave Analytics to the Service Cloud.

IN THIS SECTION:

[Get Even More from Your Sales Data with the Brand New Sales Wave App](#)

The refreshed version of Sales Wave Analytics delivers streamlined analytics with more intuitive, faster-to-navigate dashboards.

[Reset and Upgrade Features Help You Keep Wave Apps up to Date](#)

Wave apps now let you know there's a new version, upgrade to the new version, and make minor changes and restore your app.

[Supercharge Service Cloud Analytics With Service Wave, Now Generally Available](#)

The Service Wave Analytics app's ready-built dashboards guide you down a direct path through your Service Cloud data on any device. Service managers and agents get best-practice KPIs in a single place to deliver smarter customer service.

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USER PERMISSIONS

To use Wave apps:

- "Use Analytics Cloud Templated Apps"

To use Sales Wave app:

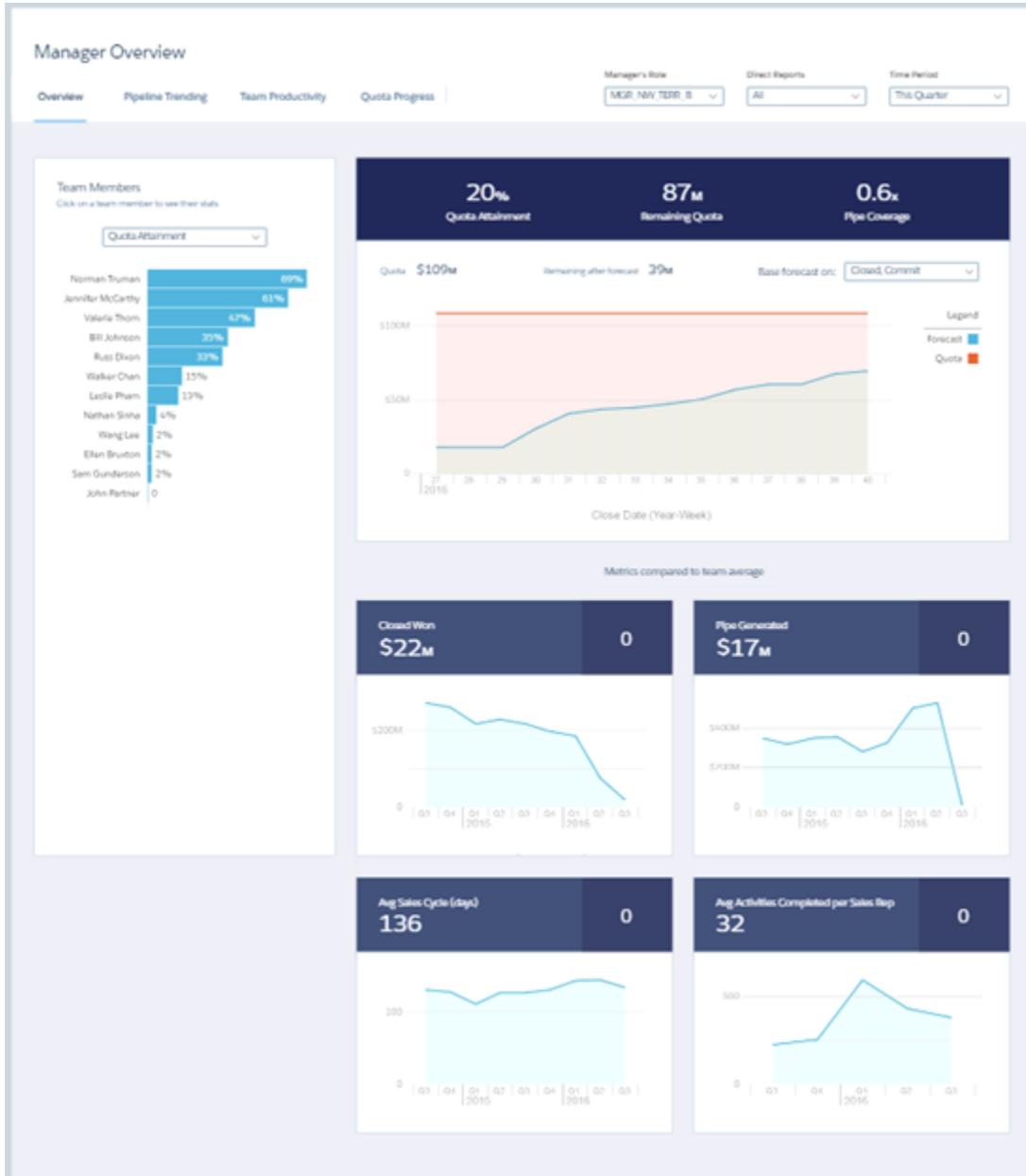
- "Access Sales Cloud Analytics Templates and Apps"

To create and manage Wave apps:

- "Manage Analytics Cloud Templated Apps"
- "Edit Wave Analytics Dataflows"

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



We've launched a brand new version of the Sales Wave app. Create it today to take advantage of its more precise configuration wizard and simpler, more straightforward dashboards. We've rebuilt the app to help you get the value from your Sales Cloud data more faster than ever, either on desktop or mobile devices.

Whether you're a sales manager or rep or you're in operations, we've enhanced the app experience to help you move quickly from analysis to action. The Sales Manager Overview dashboard shows an overview of team key performance indicators (KPIs), such as quota attainment, pipe generation, and average sales cycle time. From there, jump right to other dashboards with specifics, such as pipeline changes, quota progress, and team productivity. Or dig in to the dashboard to view the performance of individual members of the team.

Sales reps now have their own path through Sales Cloud data. Starting with the new Sales Rep Overview dashboard, review KPIs and then review quota attainment, bookings, and pipeline for a particular time period. And drill into key opportunities for accelerating deal closing to help you blast through your numbers for the quarter.

Sales operations staff can select from dashboards that visualize performance according to geography, source, customer, and product. The dashboards help the operations team spot trends and analyze closed business data to help accelerate future sales.

Additional configuration wizard settings give administrators more precise control over the app. Through its handy question and answer format, the wizard lets you bring in additional Salesforce data to the app's datasets, select how to display geographic data, and control security settings.

Create a New Version of the App Today

Create a new version of the app to take advantage of its enhancements, including the new upgrade feature that alerts you to new versions so you can instantly upgrade and start using new functionality.

Go to the Wave Analytics home page and click **Create**. Select **App**, then **Sales Wave**, and follow the instructions in the configuration wizard. When you create the app from the new Sales Wave version, Wave saves the previous version of the app along with any enhancements and customizations you've made. You can go into the original app and redo customizations in the new app.

The Wave Analytics platform license includes the Sales Wave Analytics app license. You can also purchase and use Sales Wave Analytics separately from the Wave platform.

For more specifics about getting started with Sales Wave, see [The Sales Wave Analytics App](#).

Reset and Upgrade Features Help You Keep Wave Apps up to Date

Wave apps now let you know there's a new version, upgrade to the new version, and make minor changes and restore your app.

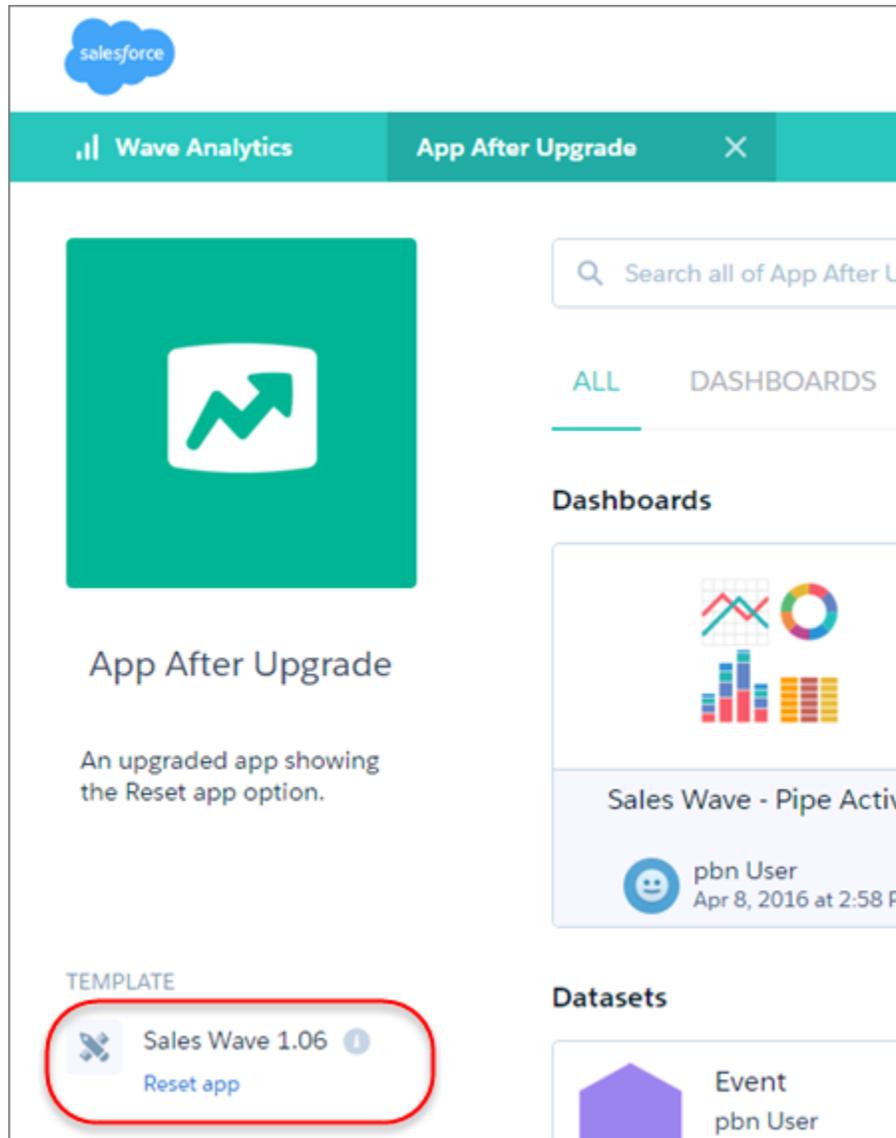
After you create a Wave Analytics app—like Sales Wave—using the Summer '16 release, you'll have access to two new features. The first is reset, which lets you make minor changes to an app you've created and restore parts of it you deleted. The second is upgrade, which you'll see only after we release a new version of an app after the Summer '16 release. Every time we release a new version, the app lets you know the new version's available and gives you the option to upgrade.

 **Note:** The reset and upgrade features aren't available for older apps created before the Summer '16.

Reset App Option

Resetting an app does the following:

- Lets you change your configuration wizard without having to delete the app and start over. For example, say that you answered "No" to the question asking if you wanted to include products data in your dashboards when you created Sales Wave. Now you want to change the answer to "Yes." The reset option lets you do that while leaving all other wizard answers as they were.
- Restores dashboards if you've deleted them.
- Restores the whole app if you've made customizations that render part or all of it unusable.



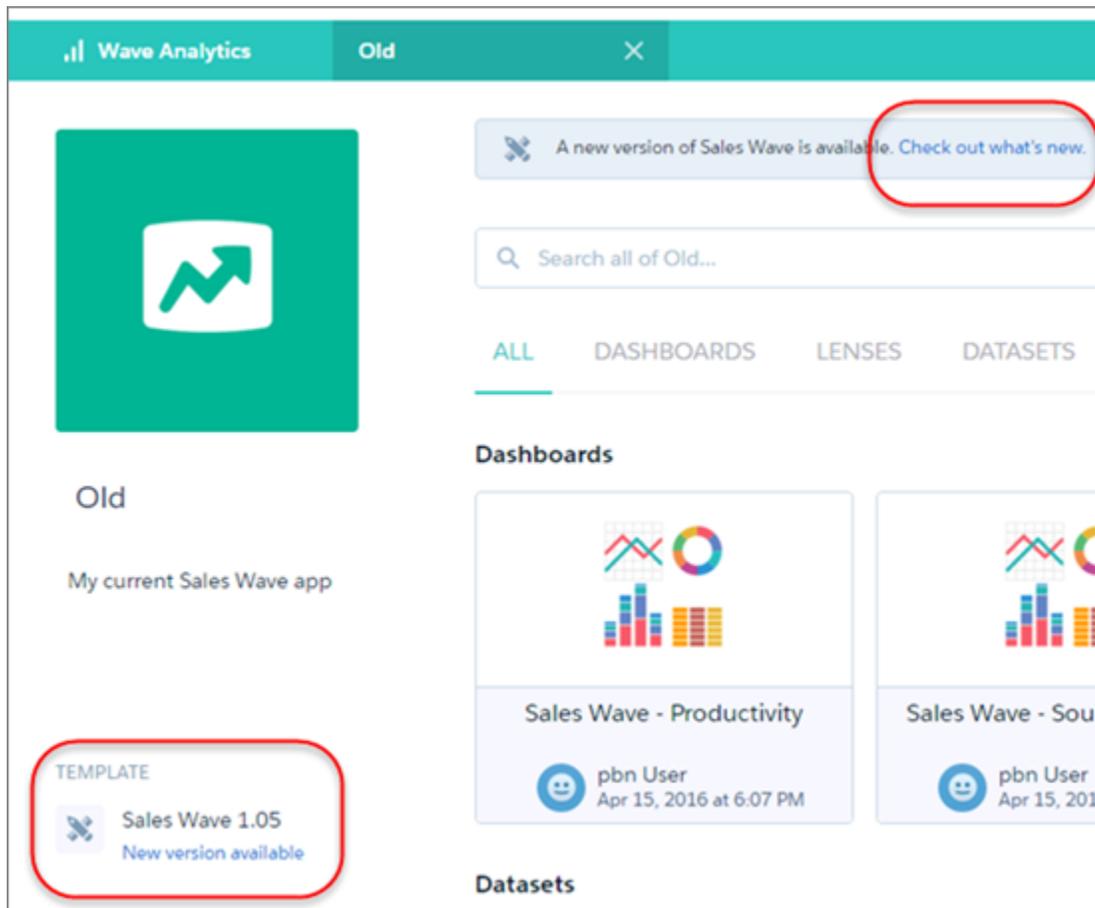
Wave apps display the reset option for apps created with the Summer '16 release or upgraded to a new version after that. Apps created before Summer '16 don't show that option. To reset your app, click **Reset app** to open the configuration wizard. It's preloaded with the answers you chose the last time you created, upgraded, or reset the app. You can then choose new settings as needed.

Important: Resetting your app overwrites it, removing any customizations such as custom objects or fields added to the dataflow or changes to security settings and dashboard colors and labels. Before you reset, we recommend that you save copies of any part of an app you've changed, including the dataflow definition file and dashboards. After resetting, you then manually copy any changes into the reset app.

Upgrade App Option

When Salesforce releases an upgrade to a prebuilt app, you can upgrade the app to take advantage of the new features. When you open a Wave app after we release a new version, a banner tells you the new version is available. Click the link there to see what's new and start the upgrade process. You can also upgrade by clicking **New version available** on the left side of the app home page.

-  **Note:** When you first create an app using the Summer '16 release, you won't see the upgrade option until we release a new version.



You can choose to create a new app or upgrade your current app.

- **Create new app**—Lets you keep the current version and then manually copy customizations over to the new app. If you've customized any parts of your app, such as the dataflow or dashboards, we recommend that you use this option.
- **Upgrade app**—Overwrites the app, all its assets, and any customizations. To preserve customizations, select **Create new app**. You can also preserve your changes by saving copies of the dataflow definition file and customized dashboards.

After you choose an option, you're taken to the configuration wizard. It's preloaded with the answers you chose the last time you created the app. You can either use the same answers or choose new ones.

Supercharge Service Cloud Analytics With Service Wave, Now Generally Available

The Service Wave Analytics app's ready-built dashboards guide you down a direct path through your Service Cloud data on any device. Service managers and agents get best-practice KPIs in a single place to deliver smarter customer service.

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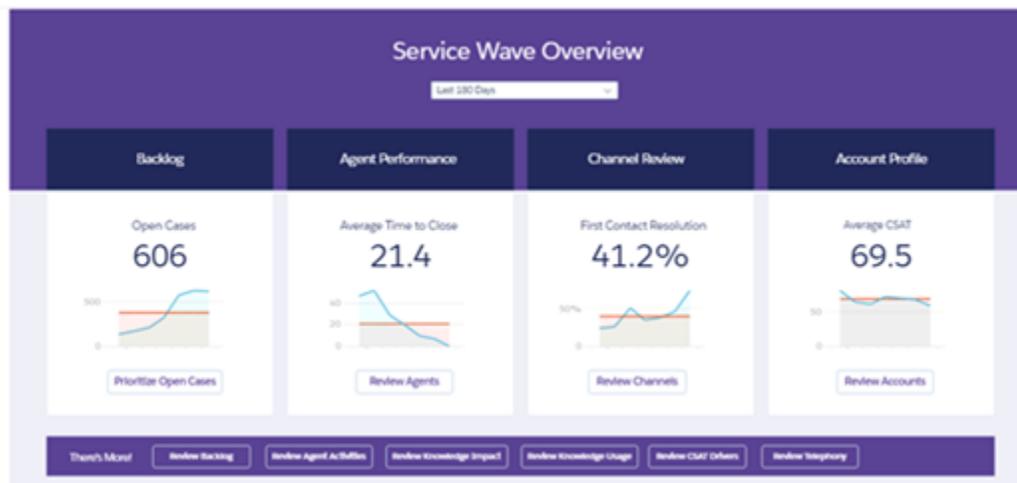
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To create and manage Wave apps:

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- "Edit Wave Analytics Dataflows"

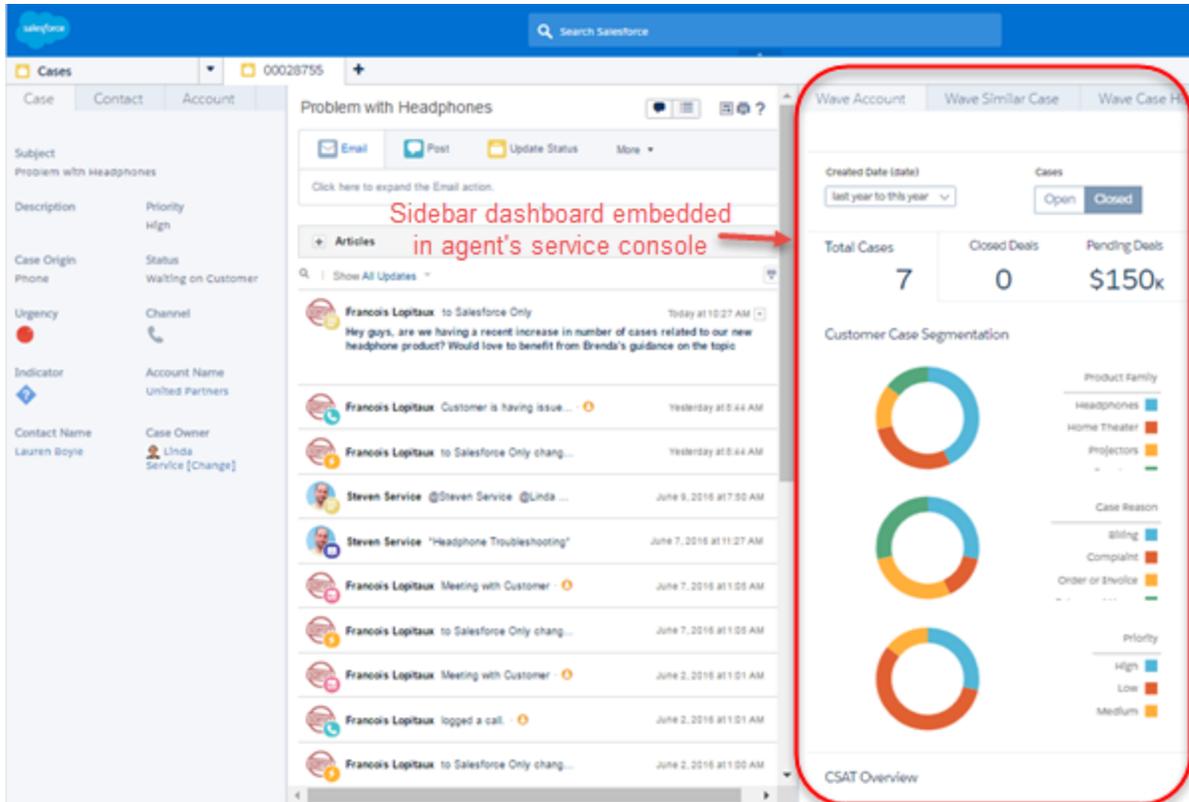
EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



We've based our new Service Wave app on learnings from many years helping businesses manage customer relationships. The goal is to provide the right amount of information at the right time to help both managers and agents make the right decisions.

The app features a set of dashboards just for service managers to give them a complete view of service customer data, including trending as well as historical and peer benchmarks. Agents can quickly view a snapshot of each case and customer through sidebars that can be embedded directly in a Salesforce page, such as the service console.



We've done the heavy-lifting, developing complex queries, benchmarking, historical trending, and visualizations that draw from your service data. All you need to do is answer questions in the handy configuration wizard about the data and fields you'd like to see.

If you're already using Wave Analytics, you can get started with Service Wave right away: your Wave platform license automatically includes a Service Wave license. Here's what you need to do:

1. Outfit your team with the right user permissions. Assign users the Service Analytics permission set license, create a permission set license with the right user permissions, and then assign it to people in your org. For details, see "Set Up Salesforce Permissions for the Sales Wave App" in Salesforce Help.
2. Admins with the right permissions can then create the app and share it with others in their org. Go to the Wave home page, click  in the upper right corner, select App, then Service Wave.
3. Answer the questions in the handy configuration wizard that's part of the app, name your app, and click Create again.

Wave takes care of the rest, creating the app and all its dashboards and datasets.

Service Wave Analytics is available under a separate license, also included with a Wave Platform license as noted already. For step-by-step getting started details, see “The Service Wave Analytics App” in Salesforce Help.

Integrate Data

Refresh your Wave data more often with multiple dataflow runs per day. Simplify analysis with better hierarchy support.

IN THIS SECTION:

[Get Data More Frequently](#)

Update your data more frequently by scheduling dataflows to run multiple times per day—up to every hour. Previously, dataflows ran only once per day.

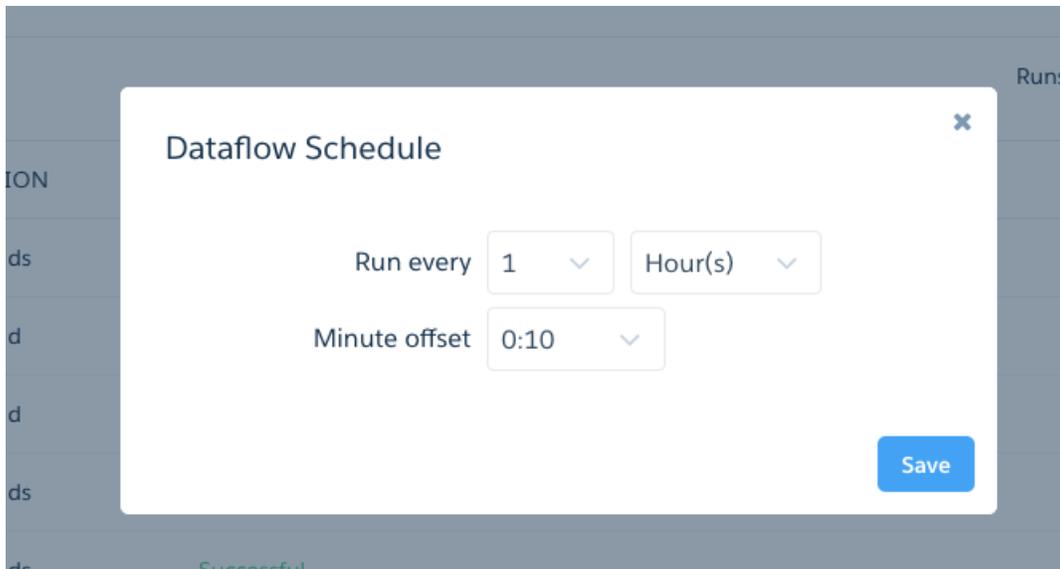
[Build More Complete Hierarchies](#)

To enable users to run queries on the entire hierarchy, the flatten transformation can now include the self node of a hierarchy in the generated paths. Previously, the flatten transformation included only ancestor nodes in the hierarchy path.

Get Data More Frequently

Update your data more frequently by scheduling dataflows to run multiple times per day—up to every hour. Previously, dataflows ran only once per day.

To run on an hourly basis, select **Hour(s)** and then specify the interval details. Minute offset is the number of minutes past the hour to run the dataflow.



Hourly scheduled dataflows run relative to a fixed base time (00:00 UTC). For example, if you schedule a dataflow to run every 6 hours with a 15-minute offset, the dataflow is scheduled to run at 00:15 UTC, 06:15 UTC, 12:15 UTC, and 18:15 UTC, each day. After you save the schedule, the scheduler specifies the time of the first dataflow run (in your timezone).

Tip: When you schedule a dataflow, consider the dataflow limit—24 dataflow runs per day. If you schedule it to run every hour and manually run it at least once, you hit the limit. If you enable replication (pilot), schedule the replication dataflow to complete before the user dataflow starts to ensure that the replicated datasets are available to the user dataflow. You can set them to run on the same hourly interval, but start at different times. For example, schedule them to run every six hours, but set the minute offset to 0 for the replication dataflow and 55 for the user dataflow. For more information about replication and the different types of dataflows, see [Getting Started with Wave Replication Tipsheet](#).

Build More Complete Hierarchies

To enable users to run queries on the entire hierarchy, the flatten transformation can now include the self node of a hierarchy in the generated paths. Previously, the flatten transformation included only ancestor nodes in the hierarchy path.

For example, let's say you flatten the role hierarchy. Previously, the Flatten transformation generated the Roles and RolePath columns as shown in the following dataset.

SelfRoleId	RoleName	ParentRoleID	Roles	RolePath
1	Sales Associate 1	10	10,20,30	\10\20\30
2	Sales Associate 2	10	10,20,30	\10\20\30
3	Sales Associate 3	11	11,20,30	\11\20\30
10	Sales Team Leader 1	20	20,30	\20\30
11	Sales Team Leader 2	20	20,30	\20\30
20	Regional Manager 1	30	30	\30
21	Regional Manager 2	30	30	\30
30	Vice President of Sales	Not applicable	Not applicable	Not applicable

Now, the generated paths can include the self role ID, which is shown in bold in the following dataset.

SelfRoleId	RoleName	ParentRoleId	Roles	RolePath
1	Sales Associate 1	10	1,10,20,30	\1\10\20\30
2	Sales Associate 2	10	2,10,20,30	\2\10\20\30
3	Sales Associate 3	11	3,11,20,30	\3\11\20\30
10	Sales Team Leader 1	20	10,20,30	\10\20\30
11	Sales Team Leader 2	20	11,20,30	\11\20\30
20	Regional Manager 1	30	20,30	\20\30
21	Regional Manager 2	30	21,30	\21\30
30	Vice President of Sales	Not applicable	30	30

To include the self ID in the generated columns, set the new `include_self_id` attribute of the Flatten transformation to `true`, as shown in the following JSON snippet. If you don't specify this attribute, Wave excludes the self ID.

```
"Flatten_UserRole": {
  "action": "flatten",
  "parameters": {
    "include_self_field": true
    "self_field": "Id",
    "multi_field": "Roles",
    "parent_field": "ParentRoleId",
    "path_field": "RolePath",
    "source": "Extract_UserRole"
  }
}
```

Develop on the Wave Platform

Developing on the Wave platform just got a lot more powerful, with new SAQL functions and additional REST API support.

IN THIS SECTION:

[Take Advantage of New SAQL Functionality](#)

Wave's SAQL functionality continues to expand with exciting new functionality in windowing, aggregation, and string handling.

[Add Annotations with the REST API](#)

Annotate dashboard widgets with comments posted in the dashboard and in Chatter.

[Improve Your Dashboards with New XMD Elements](#)

Have greater control over dimensions, measures, dates and datasets with new XMD elements, and learn about some behind-the-scenes changes.

[Review Change to XMD REST API](#)

Support for the PUT method of the XMD API endpoint is withdrawn.

Take Advantage of New SAQL Functionality

Wave's SAQL functionality continues to expand with exciting new functionality in windowing, aggregation, and string handling.

String Functions

A number of key string handling functions have been added.

- `ltrim` - Returns the left part of a string up to the specified characters, or removes leading spaces.
- `rtrim` - Returns the right part of a string back to the specified characters, or removes trailing spaces.
- `trim` - Returns the left and right part of a string up to the specified characters, or removes leading and trailing spaces.

- `upper` - Returns the string with all characters in uppercase.
- `lower` - Returns the string with all characters in lowercase.
- `substr` - Returns a substring starting at a specified position and, optionally, of the specified length.
- `len` - Returns the number of characters in the string.

Aggregation Functions

Wait, there's more! Some important new aggregation functions have been added, too.

- `percentile_disc` - Computes a specific percentile for sorted values in an entire rowset or within distinct partitions of a rowset.
- `percentile_cont` - Calculates a percentile based on a continuous distribution of the column value.
- `stddev` - Returns the sample standard deviation computed on the group.
- `stddevp` - Returns the population standard deviation computed on the group.
- `var` - Returns the sample variance (also called the unbiased variance) computed on the group.
- `varp` - Returns the population variance (also called the biased variance) computed on the group.

Windowing

Functions supporting the advanced Windowing capabilities—introduced in the last release—now include:

- `count` - Number of groups passed to the window clause. Analogous to `sum(1)`.
- `median` - Returns the middle value, or the average of two middle values if there are an even number of non-null values.
- `percentile_disc` and `percentile_cont` (see aggregation functions).

Booleans and Null Value Items

For convenience, the boolean literals `true` and `false` are now available. No need to use integers.

In most contexts, SAQL now allows the use of `null` anywhere a constant string or number would appear.

Add Annotations with the REST API

Annotate dashboard widgets with comments posted in the dashboard and in Chatter.

New REST API endpoints and their associated representations.

Annotations

- `/wave/annotations`
Supports GET and POST. Retrieves all available annotations, or creates new ones.
- `/wave/annotations/{annotationId}`
Supports GET and PATCH. Gets or updates a specific annotation.

Templates

- `/wave/templates/{templateIdOrApiName}/releasenotes`
Supports GET. Returns the release notes for the template.

Improve Your Dashboards with New XMD Elements

Have greater control over dimensions, measures, dates and datasets with new XMD elements, and learn about some behind-the-scenes changes.

Changes to XMD, including how it is stored in Salesforce and the addition of many new elements, open up new opportunities to improve the appearance and functionality of your dashboards.

Refer to the XMD 2.0 section of the [Extended Metadata Overview](#).

Review Change to XMD REST API

Support for the PUT method of the XMD API endpoint is withdrawn.

The PUT verb for the following API endpoints is no longer available.

Resource URLs

```
/wave/datasets/<dataset ID>/versions/<version ID>/xmds/main
```

```
/wave/datasets/<dataset ID>/versions/<version ID>/xmds/system
```

```
/wave/datasets/<dataset ID>/versions/<version ID>/xmds/user
```

The GET verb is not affected by this change.

Service: Enhanced Field Service, Quick Setup with Templates

Empower your field-service agents with Knowledge articles and milestones on work orders. Set up Service Cloud features in a few clicks with Launch Pad templates. And enable Social Customer Service faster and leverage its extended breadth.

IN THIS SECTION:

[Salesforce Editions: Optimized for the Service Cloud](#)

Feature availability has changed. Find out what's new.

[Field Service](#)

Field service is a key element of customer support. Summer '16 brings new capabilities to attach Knowledge articles to work orders, enforce support milestones on work orders, and manage and customize your field service.

[Salesforce Console for Service](#)

The Salesforce Console for Service is more intuitive than ever with responsive list hovers. Launch Pad templates give agents preconfigured consoles, saving them precious time. Lightning components are now available for sidebar configuration. And we say goodbye to Desktop CTI.

[Social Customer Service](#)

Not only is Social Customer Service ready to enable on your org, it has expanded features in its Instagram pilot program, mapped parent social posts to case-creating posts, and built Twitter direct message prompts and customer feedback surveys.

[Omni-Channel](#)

Make the most of your Omni-Channel experience with active time tracking, decline reasons for agents, and a nifty checkbox to turn your agents' notification sounds on or off. This feature is available in Salesforce Classic only.

[Knowledge](#)

Salesforce Knowledge now lets you customize your page layouts for mobile users, attach articles to work orders, identify key case fields to search for better article suggestions, and quickly troubleshoot your validation rules. Topics are now available on all languages your knowledge base support, the case field to data category mapping feature is now generally available, and an Article Create Date field is on each article version.

Live Agent

Your chat transcripts just got better with a new Network field. This feature is available in Salesforce Classic only.

Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes publishers, which let agents create notes, log calls, change case statuses, and communicate with customers in a feed. This feature is available in both Lightning Experience and Salesforce Classic.

Entitlement Management

Entitlement management lets you and your support agents verify and fulfill customers' support contracts. In Summer '16, hierarchical service contracts and contract line items make it easier to represent complexities in your contracts with your customers.

Assets

Assets help you track products that customers have purchased from you. In Summer '16, new related lists and delete capabilities make it easier for agents to scan an asset's history and view related support records. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Macros

Support agents who use Case Feed can use macros to complete repetitive tasks—such as selecting an email template, sending an email to a customer, and updating the case status—all in a single click. This feature is available in Salesforce Classic only.

Organization Sync

Organization Sync lets you set up a secondary, synced Salesforce org where users can work when your primary org is unavailable. Summer '16 brings a reduction in sync-related emails and the ability to sync larger file posts. This feature is available in Salesforce Classic only.

SOS

The SOS SDK gets a new user interface and an improved two-way video experience. These features are available for both iOS and Android.

Introducing Service Cloud Lightning Snap-Ins for iOS (Beta)

Access powerful Service Cloud features right from your iPhone or iPad with the new Service Cloud Lightning Snap-ins for iOS.

Salesforce Editions: Optimized for the Service Cloud

Feature availability has changed. Find out what's new.

See [Salesforce Editions Optimized for the Sales and Service Clouds](#).

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Field Service

Field service is a key element of customer support. Summer '16 brings new capabilities to attach Knowledge articles to work orders, enforce support milestones on work orders, and manage and customize your field service.

IN THIS SECTION:

[Knowledge Is Power for Field Techs](#)

Whether it's instructions, product specs, or guidelines, information is a field technician's best friend. Now, you can attach Knowledge articles to work orders and work order line items so that technicians in the field can quickly find important information. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

[Achieve Greatness in the Field with Field Service Lightning \(Generally Available\)](#)

Meet Field Service Lightning, your new field service hub in Salesforce. Schedule appointments, dispatch technicians based on skill level and location, and resolve customer issues in one seamless, mobile-friendly user interface. This feature is available in Salesforce Classic and all versions of the Salesforce1 mobile app.

[New Improvements to Field Service Lightning](#)

June 2016 brings new enhancements to the Field Service Lightning managed packages.

[Ensure Stellar Service with Milestones on Work Orders](#)

Entitlement management and work orders are tying the knot, and you're invited! With milestones now available on work orders, you can link entitlement to work orders and define and track required steps in your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

[Get Around Work Order Hierarchies with Ease](#)

Several new enhancements make it easier for you to view and build out hierarchies of work orders and work order line items. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

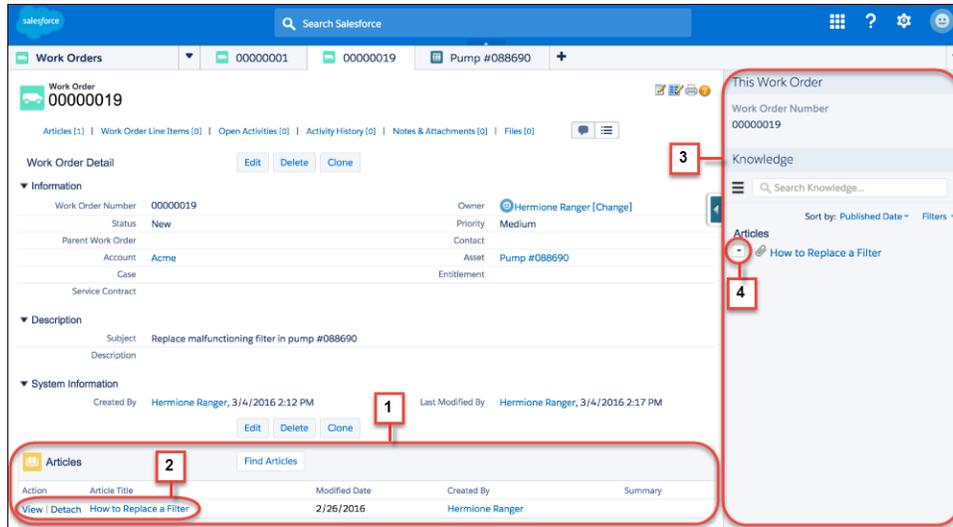
Knowledge Is Power for Field Techs

Whether it's instructions, product specs, or guidelines, information is a field technician's best friend. Now, you can attach Knowledge articles to work orders and work order line items so that technicians in the field can quickly find important information. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

View and change attached articles from the new Articles related list on work orders and work order line items **(1)**. View a linked article's properties by clicking **View**, and view the article itself by clicking its title **(2)**. Manage attached articles and search the Knowledge base from the Knowledge One widget in the console sidebar **(3)**. Each article's action menu **(4)** contains the option to attach or detach it.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud



When you attach an article, that version of the article stays associated with the work order or line item even if later versions are published. You can detach and reattach an article to ensure that users see the latest version.

To let users attach articles to work orders or work order line items:

1. Add the Knowledge One widget to the console sidebar for work orders or work order line items.
2. Add the Articles related list to the work order or work order line item detail page layouts.

You can customize related page layouts, validation rules, and more from the Linked Articles node in Setup, under Knowledge.

Warning:

- The Article widget and Feed Articles Tool aren't available in the feed view.
- Quick actions and global actions aren't supported for linked articles.
- The Knowledge One widget on work orders and work order line items lets you search for articles, but doesn't offer article suggestions.
- In the Article Toolbar on the Knowledge home page, you can't attach an article to a work order or work order line item.

Considerations for Lightning Experience Users

- In Lightning Experience, linked articles are view only. To manage linked article settings and attach or detach articles, switch to Salesforce Classic.
- In Lightning Experience, clicking an article link in a feed item redirects you to the article page in Salesforce Classic.

Considerations for Salesforce1 Users

- In Salesforce1, linked articles can't be accessed from feed items.
- In Salesforce1, linked articles are view only. Technicians on the go can search the Knowledge base and read attached articles, but they can't attach or detach articles. To manage linked article settings and attach or detach articles, use the full Salesforce site.

Achieve Greatness in the Field with Field Service Lightning (Generally Available)

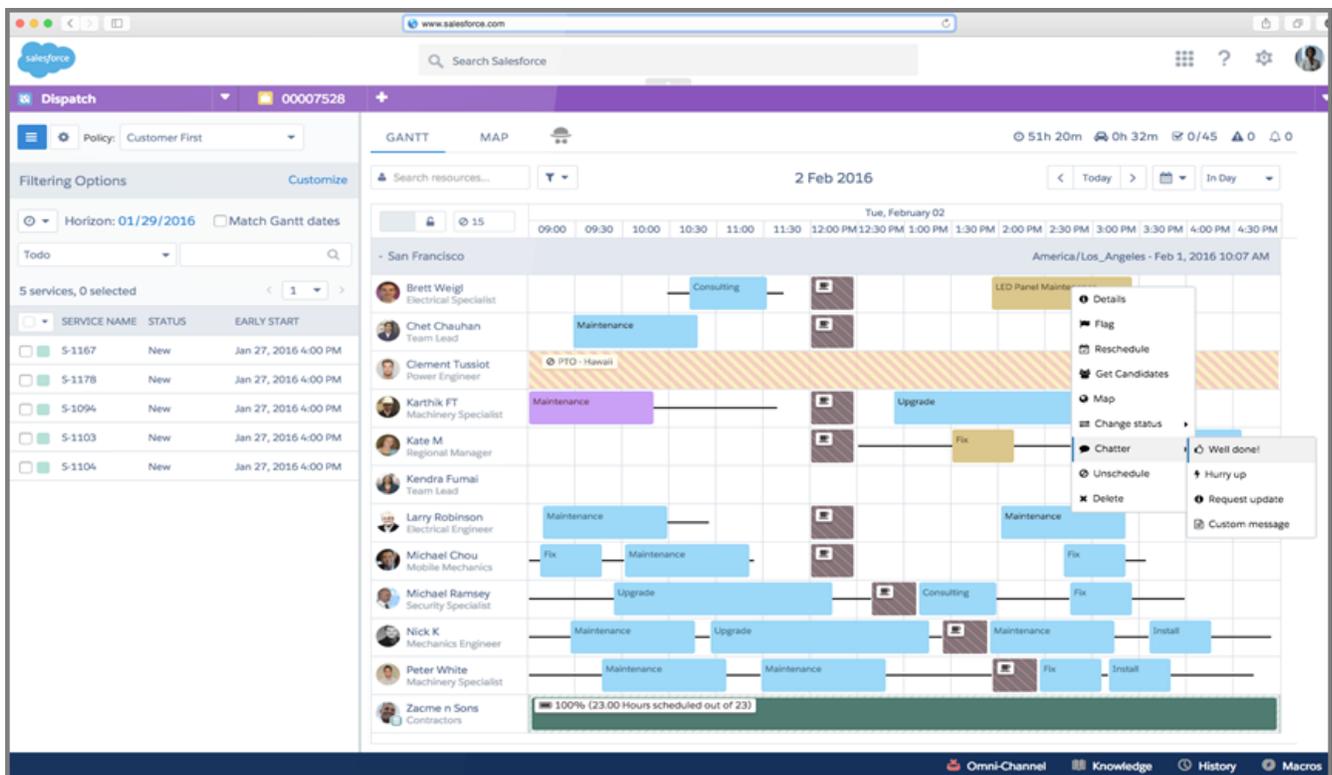
Meet Field Service Lightning, your new field service hub in Salesforce. Schedule appointments, dispatch technicians based on skill level and location, and resolve customer issues in one seamless, mobile-friendly user interface. This feature is available in Salesforce Classic and all versions of the Salesforce1 mobile app.

Field Service Lightning includes a bevy of features that serve field service dispatchers, admins, and technicians on the go.

- A dynamic scheduling console gives dispatchers and supervisors a bird's-eye view of all scheduled service appointments
- Smart scheduling capabilities account for technician skill level, travel time, location, and other service factors
- Out-of-the-box triggers allow for easy customization of your scheduling and display preferences
- A robust toolbox of custom objects, work rules, and scheduling policies help you define your ideal scheduling model

EDITIONS

Available for additional purchase in: **Enterprise, Performance, Unlimited, and Developer** Editions



To learn more about Field Service Lightning, see [Getting Started with Field Service Lightning](#) or get in touch with your Salesforce representative.

SEE ALSO:

[Salesforce1: Use Field Service Lightning On the Go](#)

New Improvements to Field Service Lightning

June 2016 brings new enhancements to the Field Service Lightning managed packages.

The latest version of the managed packages includes the following new capabilities:

- Use the service scheduling optimizer to automatically schedule all unscheduled services in a way that maximizes the efficiency of your workforce.
- Access the managed packages in Salesforce's 32 fully supported languages.
- Define customers' visiting hours to indicate when their services can be scheduled.
- Swiftly schedule, dispatch, and track emergency appointments with the new Emergency Chatter action on services, which includes a real-time map view.
- Schedule services that span multiple days.
- View a resource's monthly schedule and capacity with the new monthly view in the dispatcher console.
- Schedule services, view traffic data, view optimized routes, and expose additional data in the map view.
- Color-code scheduled services and enjoy more sophisticated filtering in the Gantt.

To learn more about these improvements, see [What's New in June 2016](#). To update your managed packages to the June 2016 version, re-download the packages using the original installation links that Salesforce provided to you.

EDITIONS

Available in Salesforce Classic

Available for an additional cost in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Ensure Stellar Service with Milestones on Work Orders

Entitlement management and work orders are tying the knot, and you're invited! With milestones now available on work orders, you can link entitlement to work orders and define and track required steps in your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Previously, entitlement management was just available for cases. Now you can specify whether an entitlement process can enforce milestones on *cases* or on *work orders*. The new `Entitlement Process Type` field indicates how the process will be used:

EDITIONS

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Entitlement Process Information	
Entitlement Process Name	Standard Field Support
Entitlement Process Type	Work Order
Description	The default field support process for customers.
Active	<input checked="" type="checkbox"/>

Milestones help you enforce the terms in your customer support agreements. For example, you can:

- Create an Assignment milestone to ensure that new work orders are assigned to a technician within 1 hour of being created
- Create a Resolution Time milestone to ensure that high-priority work orders are closed within 48 hours

If entitlement management is already set up in your org, complete these steps to get started with milestones on work orders:

1. Add the Work Orders related list to entitlement page layouts.

2. Add the milestone tracker to work order feed layouts and as a custom console component to let agents keep an eye on active milestones.
 3. Add the Milestones related list to work order page layouts to display the milestones on a work order.
 4. Add the following fields to work order page layouts.
 - `Business Hours`—The business hours that the work order follows
 - `Entitlement Name`—The entitlement associated with the work order
 - `Entitlement Process End Date`—The date the entitlement process stops running on the work order
 - `Entitlement Process Start Date`—The date the entitlement process started running on the work order
 - `Milestone Status`—The status of an active milestone
 - `Milestone Status Icon`—An icon that corresponds to the milestone status
 5. To view a list of work orders with milestones in your org, use the Object Milestones custom report type to create a work order report.
- If you're new to entitlement management, see the [Entitlement Management Setup Checklist](#).

Important:

- If you're using entitlement processes, we recommend that you manage customers' work orders and cases on separate entitlements, because an entitlement process runs only on records that match its type. For example, a Case entitlement process that's applied to an entitlement runs only on associated cases, not work orders.
- You can't change an existing entitlement process's type, even when you're creating a new version. Entitlement processes created before Summer '16 use the Case type.
- Manage page layouts and validation rules for work order milestones from the new Object Milestones node in Setup in Salesforce Classic.

Considerations for Lightning Experience Users

- Milestones are view only in Lightning Experience. To manage milestones, switch to Salesforce Classic.
- The Object Milestones related list and milestone tracker aren't available in Lightning Experience.
- Clicking a milestone-related feed item on a work order in Lightning Experience redirects you to Salesforce Classic.

Considerations for Salesforce1 Users

- The milestone tracker is not available in Salesforce1.

Get Around Work Order Hierarchies with Ease

Several new enhancements make it easier for you to view and build out hierarchies of work orders and work order line items. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

The new read-only field `Root Work Order` lists the top-level work order in a hierarchy of work orders. If a hierarchy has only two levels, a work order's parent is the same as its root. Add the new field to work order page layouts to give users a more complete view of work order hierarchies. Similarly, the new `Root Work Order Line Item` field lists the top-level line item in a work order line item hierarchy.

The new Child Work Orders related list on work order page layouts lists a work order's child work orders, making it easy to add child work orders and navigate a work order hierarchy. Similarly, you can add the Child Work Order Line Items related list to work order line item layouts.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

Salesforce Console for Service

The Salesforce Console for Service is more intuitive than ever with responsive list hovers. Launch Pad templates give agents preconfigured consoles, saving them precious time. Lightning components are now available for sidebar configuration. And we say goodbye to Desktop CTI.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

IN THIS SECTION:

[Set up Service Cloud Features in a Flash with Launch Pad Templates](#)

Deploy and test Service Cloud features with just a few clicks. This suite of templates helps you set up some of the most popular Service Cloud features, such as time-saving console configurations and reports and dashboards essential for a service organization.

[See What's What with Responsive List Hovers](#)

Last release, we let you peek into tabs with tab hovers. With this release, you can peek into list-view rows too, just by mousing over them.

[Shazam! Lightning Sidebar Components Are Here](#)

You can now embed Lightning components in sidebars through Visualforce pages. Use the power of Lightning to empower your Salesforce experience!

[Say Au Revoir \(and Goodbye\) to Desktop CTI](#)

Ever a good soldier, our Desktop CTI (computer-telephony integration) will reach the end of its life with the Spring '17 release. In its place, the more capable and flexible Open CTI assumes the reins.

[New Methods for the Console Integration Toolkit](#)

You can customize a console programmatically using the Salesforce Console API. This feature is available in Salesforce Classic only.

Set up Service Cloud Features in a Flash with Launch Pad Templates

Deploy and test Service Cloud features with just a few clicks. This suite of templates helps you set up some of the most popular Service Cloud features, such as time-saving console configurations and reports and dashboards essential for a service organization.

Here are the templates we're launching this release.

Standard Console	Get the latest and greatest console features.
Branded Console	Easily customize the console with your logo and branding.
Service Reports & Dashboards	Deploy a suite of preconfigured reports and dashboards.

To get started using templates, from the Setup **Quick Search** box, enter **Launch Pad**.



Tip: It's best to try Launch Pad in your sandbox environment, so that you can test out new features without affecting your live production environment.

A branded console

ACTION	CASE NUMBER ↑	CONTACT NAME	SUBJECT	STATUS	PRIORITY	DATE/TIME OPENED	CASE OWNER ALIAS
🗑️	00001000	Amos, Jon	Sample Case: Our Widgets h...	Escalated	High	2/11/2016 12:30 PM	ALUser
🗑️	00001001	Stamos, Edward	Sample Case 2: The widgets ...	New	High	2/11/2016 12:30 PM	ALUser
🗑️	00001002	Stamos, Edward	Sample Case 3: Cannot trac...	On Hold	Low	2/11/2016 12:30 PM	ALUser
🗑️	00001000	Amos, Jon	Sample Case: Our Widgets h...	Escalated	High	2/11/2016 12:30 PM	ALUser
🗑️	00001001	Stamos, Edward	Sample Case 2: The widgets ...	New	High	2/11/2016 12:30 PM	ALUser
🗑️	00001002	Stamos, Edward	Sample Case 3: Cannot trac...	On Hold	Low	2/11/2016 12:30 PM	ALUser
🗑️	00001000	Amos, Jon	Sample Case: Our Widgets h...	Escalated	High	2/11/2016 12:30 PM	ALUser
🗑️	00001001	Stamos, Edward	Sample Case 2: The widgets ...	New	High	2/11/2016 12:30 PM	ALUser
🗑️	00001002	Stamos, Edward	Sample Case 3: Cannot trac...	On Hold	Low	2/11/2016 12:30 PM	ALUser
🗑️	00001000	Amos, Jon	Sample Case: Our Widgets h...	Escalated	High	2/11/2016 12:30 PM	ALUser

Launch Pad templates aren't supported for IE version 9 or earlier.

See What's What with Responsive List Hovers

Last release, we let you peek into tabs with tab hovers. With this release, you can peek into list-view rows too, just by mousing over them.

Responsive lists now display the details of a row in a hover, so you can preview it without opening each record.

Case Origin	Case Number	Account Name
Phone	00001002	Acme
Status	Priority	
On Hold	Low	
Description		
User is not able to track his order. He is getting error "Tracking number does not exist"		

00001002 Acme On Hold Low Sample Case 3:...

Here's how to enable responsive lists with hovers.

1. In Setup, select **Create > Apps**, and find the name of the console you want to modify.
2. Click **Edit**.

3. Select **Enable Responsive Lists**.

4. Click **Save**.

The fields that appear in the overlay mirror the fields in the active list view. To customize which fields appear, see [Edit List Views](#) and [Create Custom List Views](#) in the Salesforce help. (The list view must be expanded wide enough for the Edit, Delete, and Create New View links to be visible.)

Some nitty-gritty about list hovers:

- For cases, the hover title is always the `subject` field. For other entities, it's the `name` field.
- You always see the `Description` field on case hovers, even though it can't be added to the list view.
- If the `subject` or `name` field isn't in the list view, the hover doesn't have a title.

Responsive lists aren't supported for IE version 10 or earlier.

Shazam! Lightning Sidebar Components Are Here

You can now embed Lightning components in sidebars through Visualforce pages. Use the power of Lightning to empower your Salesforce experience!

Get grounded in Lightning and Visualforce through our [Lightning FAQs](#). And for the technically minded, the [Lightning Components Developer Guide](#) is electrifying.



Say Au Revoir (and Goodbye) to Desktop CTI

Ever a good soldier, our Desktop CTI (computer-telephony integration) will reach the end of its life with the Spring '17 release. In its place, the more capable and flexible Open CTI assumes the reins.

If you've been using an adapter built on Desktop CTI, it will no longer work as of Spring '17. You'll need to migrate to Open CTI. Learn how to [install Open CTI](#), and how to [customize it](#) to meet your company's needs.

New Methods for the Console Integration Toolkit

You can customize a console programmatically using the Salesforce Console API. This feature is available in Salesforce Classic only.

New and updated methods are available to help developers and advanced administrators update console tabs. For more information, see [Salesforce Console API \(Integration Toolkit\)](#) on page 429.

Social Customer Service

Not only is Social Customer Service ready to enable on your org, it has expanded features in its Instagram pilot program, mapped parent social posts to case-creating posts, and built Twitter direct message prompts and customer feedback surveys.

IN THIS SECTION:

[Social Customer Service for All](#)

Existing and new Enterprise, Unlimited, and Performance Edition organizations have the Social Objects and Social Publisher objects available. Now you can enable Social Customer Service quickly and easily without downloading the Radian6 AppExchange app or contacting Salesforce.

[Parent Posts for Improved Case Context](#)

Context is king—particularly when responding to traffic on a busy Facebook page. Facebook pages have a three-level hierarchy: a top-level wall post can get X number of comments, and each of those comments can get Y number of replies. If a reply or comment is taken out of context from its higher-level parent, a well-meaning social care agent can send an incorrect response that can frustrate customers and even embarrass your brand. Similar #fails can also happen on Twitter.

[Instagram #hashtag Listening](#)

If you're participating in the Instagram pilot, you can now receive and reply to social posts when your brand's #hashtag is mentioned.

[Raise the Service Bar with Twitter Customer Care](#)

Your agents can send Twitter Direct Message invitations and send customer feedback surveys, to quantitatively track your social care team's effectiveness and performance.

[More Social Accounts](#)

You can synchronize up to 2,000 managed social accounts from Social Studio. However, the Social Customer Service Settings page in Setup only shows up to 500 managed social accounts.

Social Customer Service for All

Existing and new Enterprise, Unlimited, and Performance Edition organizations have the Social Objects and Social Publisher objects available. Now you can enable Social Customer Service quickly and easily without downloading the Radian6 AppExchange app or contacting Salesforce.

1. From Setup, enter `med` in the `Quick Find` box, then select **Social Customer Service**.
2. On the Settings tab, check `Enable Social Customer Service`.

 **Important:** If you have two or fewer social accounts to track, you can use the free starter pack. Otherwise, you must have sufficient Social Studio accounts.

Social Customer Service integrates with Radian6 and Social Studio so service agents and sales representatives can engage customers by responding to cases and leads created from Facebook, Twitter, and other social networks.

Social Network	Release State
Facebook	Generally Available
Twitter	Generally Available
Google+	Pilot Program
Instagram	Pilot Program
LinkedIn	Pilot Program

Social Network	Release State
Sina Weibo	Pilot Program

To learn more, see the [Complete Guide to Social Customer Service](#).

Parent Posts for Improved Case Context

Context is king—particularly when responding to traffic on a busy Facebook page. Facebook pages have a three-level hierarchy: a top-level wall post can get X number of comments, and each of those comments can get Y number of replies. If a reply or comment is taken out of context from its higher-level parent, a well-meaning social care agent can send an incorrect response that can frustrate customers and even embarrass your brand. Similar #fails can also happen on Twitter.

Now you can bring in the parent post of a thread your company is @mentioned within. For example, previously if there was a conversation on twitter, and your company was @mentioned, the first post imported into Social Customer Service was the one where you were @mentioned. Now, if the post's parent is in Social Studio, you can bring in the parent post too for better context.

1. From Setup, enter *Med* in the **Quick Find** box, then select **Social Customer Service**.
2. On the Settings tab, select **Enable retrieval of parent posts for added context**.
3. Click **Save**.
4. Upgrade the Social Lookup add-on component that's available for the right sidebar of the Service Console.

Instagram #hashtag Listening

If you're participating in the Instagram pilot, you can now receive and reply to social posts when your brand's #hashtag is mentioned.

To activate Instagram #hashtag listening, [create a rule](#) in your Social Hub account to receive posts when your brand's #hashtag is mentioned.

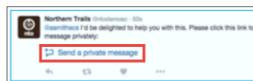
Raise the Service Bar with Twitter Customer Care

Your agents can send Twitter Direct Message invitations and send customer feedback surveys, to quantitatively tack your social care team's effectiveness and performance.

Salesforce Social Customer Service has two new Twitter features to help your agents serve your customers better.

Easy Links for Twitter Direct Message Invitations

If your Twitter settings allow you to receive direct messages from anyone, you can send links to invite users to direct message conversations when they have @mentioned your brand in a public conversation.



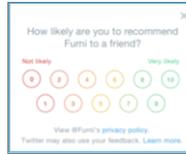
To send a deep link direct message invitation, paste this link into your outbound message:

```
https://Twitter.com/messages/compose?recipient_id={your Twitter account's numeric user ID}
```

You can find your twitter account's numeric ID on twitter.com by going to **Your Twitter User > Settings > Your Twitter Data**. Twitter handles the URLs and the rendering in their native clients.

Send Survey Cards in Twitter Direct Messages

Gather customer feedback at the end of a customer service interaction in a Twitter direct message. Twitter customer feedback allows social care teams to track key metrics like Net Promoter Scores® and Customer Satisfaction Ratings right in Salesforce. After reaching a resolution to their issue, customers receive a simple survey card in their direct message window.



These cards are quick and easy to complete, which drives high response rates.

More Social Accounts

You can synchronize up to 2,000 managed social accounts from Social Studio. However, the Social Customer Service Settings page in Setup only shows up to 500 managed social accounts.

Agents can respond from all synced accounts from the social publisher on the case feed. If you are syncing more than 500 social accounts, allow at least a minute for the settings page to load.

Omni-Channel

Make the most of your Omni-Channel experience with active time tracking, decline reasons for agents, and a nifty checkbox to turn your agents' notification sounds on or off. This feature is available in Salesforce Classic only.

EDITIONS

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Track Agents' Active Time on Work](#)

Track how long agents have an Omni-Channel work item open and in focus on their console. This feature is available in Salesforce Classic only.

[Limits Raised to 5,000 per Hour and 10,000 Total](#)

We hear you—you want to handle more work on Omni-Channel. We've raised our limits to 5,000 maximum queued work items per hour and 10,000 maximum pending routing requests. This feature is available in Salesforce Classic only.

[No, Thanks: Let Agents Provide a Reason When Declining Work](#)

Create a set of reasons for agents to choose from when they decline a work request. This feature is available in Salesforce Classic only.

[Give Agents Peace and Quiet by Disabling Notification Sounds](#)

Turn notification sounds on or off for your agents. This feature is available in Salesforce Classic only.

Track Agents' Active Time on Work

Track how long agents have an Omni-Channel work item open and in focus on their console. This feature is available in Salesforce Classic only.

Agents multitask. To get the full picture of an agent's productivity, you want to look at how long their work is open as well as how long they directly work on each item.

Active time tracking extends the operational data that Omni-Channel provides through its Agent Work object. Agent Work now includes:

- **Handle Time**—The amount of time a work item is open with an agent. It's calculated as the duration between the agent accepting the Omni work item and closing it in the console.
- **Active Time**—The amount of time the agent is directly working on an item. It measures the time the work item's tab is open and in focus.

Add Handle Time and Active Time tracking to your report types for Agent Work and see just how quickly your agents get the job done.

EDITIONS

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Limits Raised to 5,000 per Hour and 10,000 Total

We hear you—you want to handle more work on Omni-Channel. We've raised our limits to 5,000 maximum queued work items per hour and 10,000 maximum pending routing requests. This feature is available in Salesforce Classic only.

See [Salesforce Features and Edition Limits](#) to learn more about Omni-Channel limits.

EDITIONS

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

No, Thanks: Let Agents Provide a Reason When Declining Work

Create a set of reasons for agents to choose from when they decline a work request. This feature is available in Salesforce Classic only.

When you enable agents to decline requests in your Presence Configuration, you can add a set of decline reasons. They work seamlessly with the Omni-Channel widget, so agents can select a reason right from their work request when they choose to decline work.

To create decline reasons, go to Setup, enter *Omni-Channel* in the **Quick Find** box, and select **Presence Decline Reasons**.

When your decline reasons are created and in use, add them to your reports through the Agent Work object's new Decline Reason column.

EDITIONS

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Give Agents Peace and Quiet by Disabling Notification Sounds

Turn notification sounds on or off for your agents. This feature is available in Salesforce Classic only.

Notification sounds help a lot of agents stay on top of their work requests, but others prefer just having the visual cues. Keep the peace by selecting **Disable Notification Sounds** in the Presence Configuration.

EDITIONS

Omni-Channel is available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Knowledge

Salesforce Knowledge now lets you customize your page layouts for mobile users, attach articles to work orders, identify key case fields to search for better article suggestions, and quickly troubleshoot your validation rules. Topics are now available on all languages your knowledge base support, the case field to data category mapping feature is now generally available, and an Article Create Date field is on each article version.

IN THIS SECTION:

[Page Layouts for Your Agents on the Go](#)

Got agents on the move? Give them their own article page layouts with the fields they need in their on-the-go environment.

[Attach Articles to Work Orders](#)

Make it easier for technicians in the field to quickly find the information they need. A new option to attach Knowledge articles to work orders and work order line items lets you incorporate your Knowledge base into your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

[Improve Article Suggestions on Cases](#)

You can choose five case fields used to suggest articles when closing cases.

[Voilà: Topics on Articles Available in All Supported Languages](#)

Your agents and public readers can attach topics to any article no matter the language. Topics help boost the articles relevancy when a topic matches a search term. Keep in mind that contrary to data categories, topics added to an article are not transferred on the same article in another language.

[Case Field to Data Category Mapping \(Generally Available\)](#)

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

[Troubleshoot Your Validation Rules More Quickly](#)

Tired of searching for that broken field in your validation rule? We fixed that! Now when your validation rule is not valid, all error messages appear at the top of the page rather than one at a time.

[See the Original Article's Created Date on the Article Versions](#)

Ever wonder when an article was originally created while working with one of its versions? Wonder no more. Your article versions now have an Article Created Date field.

[Spell Checker Removed from Rich Text Fields](#)

The Salesforce spell checker is no longer available when users edit rich text area fields in articles. We recommend using the spell checker in your browser instead.

[Encrypt Your Knowledge Articles](#)

Now you can use Shield Platform Encryption to protect the contents of your Knowledge articles. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Enterprise** and **Unlimited** Editions.

Page Layouts for Your Agents on the Go

Got agents on the move? Give them their own article page layouts with the fields they need in their on-the-go environment.

You can add Salesforce1 actions to your article page layouts. You can then configure which actions to expose in the Salesforce1 hybrid app.

 **Note:** The Salesforce1 actions are not available on article page layouts in Salesforce Classic, except for actions on the article feed.

Attach Articles to Work Orders

Make it easier for technicians in the field to quickly find the information they need. A new option to attach Knowledge articles to work orders and work order line items lets you incorporate your Knowledge base into your field service process. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

To learn more, see [Knowledge Is Power for Field Techs](#).

Improve Article Suggestions on Cases

You can choose five case fields used to suggest articles when closing cases.

Search on the Knowledge tab suggests articles based on their content similarity and their links between similar cases. If no articles are linked to similar cases, suggested articles have similar titles as the case or have keywords in common with admin-selected case fields. Suggested articles are available in the Salesforce Console for Service and your portals when viewing existing cases and creating ones.

 **Note:** By default, the **Subject** field is selected. Choose up to five of the available short text fields that include a description of the issue, the affected product, or the case topic. We recommend choosing short text fields to return more relevant results. Only the first 100 characters of the content from all admin-selected fields are searched. The Description field is always taken into account when suggesting articles for cases and does not count toward the character limit.

Voilà: Topics on Articles Available in All Supported Languages

Your agents and public readers can attach topics to any article no matter the language. Topics help boost the articles relevancy when a topic matches a search term. Keep in mind that contrary to data categories, topics added to an article are not transferred on the same article in another language.

 **Note:** Suggested topics are still only supported in English.

Topics can be added from the article view and detail pages. Suggested topics are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

Topics for articles are enabled for each article type.

1. From Setup, enter *Topics for Objects* in the **Quick Find** box, then select **Topics for Objects**.
2. Click the article type name where you want to enable topics.
3. Check **Enable topics**.
4. Select which fields you want to use for suggestions.
5. Click **Save**.
6. Via profile or permission set, under System Permissions, define which agents can assign, create, delete, and edit topics.

Case Field to Data Category Mapping (Generally Available)

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

 **Important:** Filtering articles based on case information is only supported in text and picklist fields.

To implement data category mapping, select which case fields map to which data categories and set a default data category for cases that have no value for the mapped fields.

1. From Setup, enter *Data Category Mappings* in the *Quick Find* box, then select **Data Category Mappings**.
2. In the *Case Field* column, use the drop-down list to add a field.
3. In the *Data Category Group* column, use the drop-down list to map the information from the lookup field to a data category.
4. In the *Default Data Category* column, use the drop-down list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

Troubleshoot Your Validation Rules More Quickly

Tired of searching for that broken field in your validation rule? We fixed that! Now when your validation rule is not valid, all error messages appear at the top of the page rather than one at a time.

See the Original Article's Created Date on the Article Versions

Ever wonder when an article was originally created while working with one of its versions? Wonder no more. Your article versions now have an Article Created Date field.

The Article Created Date field can be exposed in the page layout and in new custom report types with article versions. Now you can see both the original article's creation date and the article version's creation date, at the same time!

 **Important:** The Article Created Date field is not supported in custom report types that join KnowledgeArticle and KnowledgeArticleVersion.

Spell Checker Removed from Rich Text Fields

The Salesforce spell checker is no longer available when users edit rich text area fields in articles. We recommend using the spell checker in your browser instead.

For more information see [Salesforce In-App Spell Checker Feature Retirement](#).

Encrypt Your Knowledge Articles

Now you can use Shield Platform Encryption to protect the contents of your Knowledge articles. This feature is available in both Lightning Experience and Salesforce Classic.

To attach encrypted files, use an article type that includes a file field. You can then upload encrypted files as long as you have Platform Encryption enabled for files and attachments.

SEE ALSO:

[Platform Encryption](#)

Live Agent

Your chat transcripts just got better with a new Network field. This feature is available in Salesforce Classic only.

IN THIS SECTION:

[See Where Chats Come from in the Chat Transcript](#)

Keep track of where chats come from—even after they've ended—using the Network field in chat transcripts. This feature is available in Salesforce Classic only.

See Where Chats Come from in the Chat Transcript

Keep track of where chats come from—even after they've ended—using the Network field in chat transcripts. This feature is available in Salesforce Classic only.

If you're analyzing chats after the fact, chances are you want to know your customers' originating networks or service providers—especially when customers have network issues during the chat. Live Agent has always provided this information to agents in the Console, and now you can report on it too by adding the Network column to your Live Agent Transcript reports.

Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes publishers, which let agents create notes, log calls, change case statuses, and communicate with customers in a feed. This feature is available in both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Let Agents Know When the System Updates Cases](#)

Rename the `Automated Case User` to `System` so support agents can easily see when automated processes, such as case assignment rules, create a case or change the status of a case.

[Put Your House in Order: Case Feed Auto-Response Order](#)

Change the order of case feed items and records, so feed items that are automatically generated appear after the customer's first email to your support center.

EDITIONS

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

EDITIONS

Live Agent is available in: **Performance** Editions and in **Developer** Edition orgs that were created after June 14, 2012

Live Agent is available in: **Unlimited** Edition with the Service Cloud

Live Agent is available for an additional cost in: **Enterprise** and **Unlimited** Editions

Lightning Experience Email Beautification

We've redesigned the Lightning Experience email action to save screen real estate and improve usability, making it even simpler for agents to send email.

Respond Even Faster to Customers with Type Ahead

Addressing emails in Case Feed just got faster. When an agent enters a few letters of a person's name or email address, Type Ahead automatically suggests matching names and addresses, just as in Gmail. If multiple names or email addresses with the same letters match the letters that the agent entered, a drop-down appears showing all matches across Contacts, Leads, and Users.

Display the From Field in the Email Quick Action

Now, you can add the From field to the email quick action Lightning Experience, so agents can see it when reading and writing emails in Case Feed.

Let Agents Know When the System Updates Cases

Rename the `Automated Case User` to `System` so support agents can easily see when automated processes, such as case assignment rules, create a case or change the status of a case.

Previously, the `Automated Case User` could only be the name of a user. This confused agents, because feed items and items in related lists were attributed to a user when they were actually created by an automated process like an auto-assignment rule. Now, you can set the name of the `Automated Case User` to `System`, so agents can tell whether real users or automated processes create feed items.

USER PERMISSIONS

To change support settings:

- "Manage Cases"
- AND
- "Customize Application"

Cases 00001030

Customer: Edward Stamos **Widget doesn't work** Status: New
Priority: Medium
Case Owner: allSFDC

My widget doesn't work. Please send me a new one.

Post Email Log a Call Change Status File More

Click here to expand the Email action.

All Updates All Emails Call Logs Case Notes More

System sent an email... Today at 11:32 AM
to Edward Stamos
Your case # 00001030: Widget... has been updated. Please click on the link below to view this case on the Self-Service portal.
<insert the link to your Self-Service portal login page here>
signup.org.test.1452723817244 Customer Support
Show Less
Reply · Reply All

System changed Case Owner (using assignment rule) from System to allSFDC. Today at 11:32 AM

Edward Stamos My widget doesn't work. Please send me... Today at 11:32 AM

System created this case. Today at 11:32 AM
00001030
Subject: Widget doesn't work
Priority: Medium
Status: New
Case Number: 00001030

1. From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. For *Automated Case User*, select *System* from the menu.
When you select System, the lookup field is unavailable. You can use the lookup field only when you're specifying a user.
4. In the email field, enter an email address. This email address must be a different email address than the email address used for Email-to-Case notifications. You can check which email address is used for Email-to-Case notifications in the Email-to-Case settings.

Support Settings Help for this Page ?

Save Cancel

Support Settings I = Required Information

User Admin

Notify Default Case Owner

Automated Case User System

System

admin@example.com

The default owner of a case when assignment rules fail to locate an owner.

The user listed in the Case History related list for automated case changes from:

- Assignment rules
- Escalation rules
- On-Demand Email-to-Case
- Cases logged in the Self-Service portal

5. Click **Save**.

SEE ALSO:

[Salesforce Help: Support Settings \(can be outdated or unavailable during release preview\)](#)

Put Your House in Order: Case Feed Auto-Response Order

Change the order of case feed items and records, so feed items that are automatically generated appear after the customer's first email to your support center.

Previously, when an auto-response rule sent an email to a customer ("Thanks, we got your email"), the feed item and record for the automated email appeared before the customer's first email message to your company's support center. With the Create Auto-Response Record After Customer's First Email setting turned on, auto-response items now appear in, well, a logical order.

In the first screenshot, the auto-response feed item "Your case has been updated" appears *before* the customer's initial email. Feed items appear in this order when the setting is turned off.

USER PERMISSIONS

To change support settings:

- "Manage Cases"

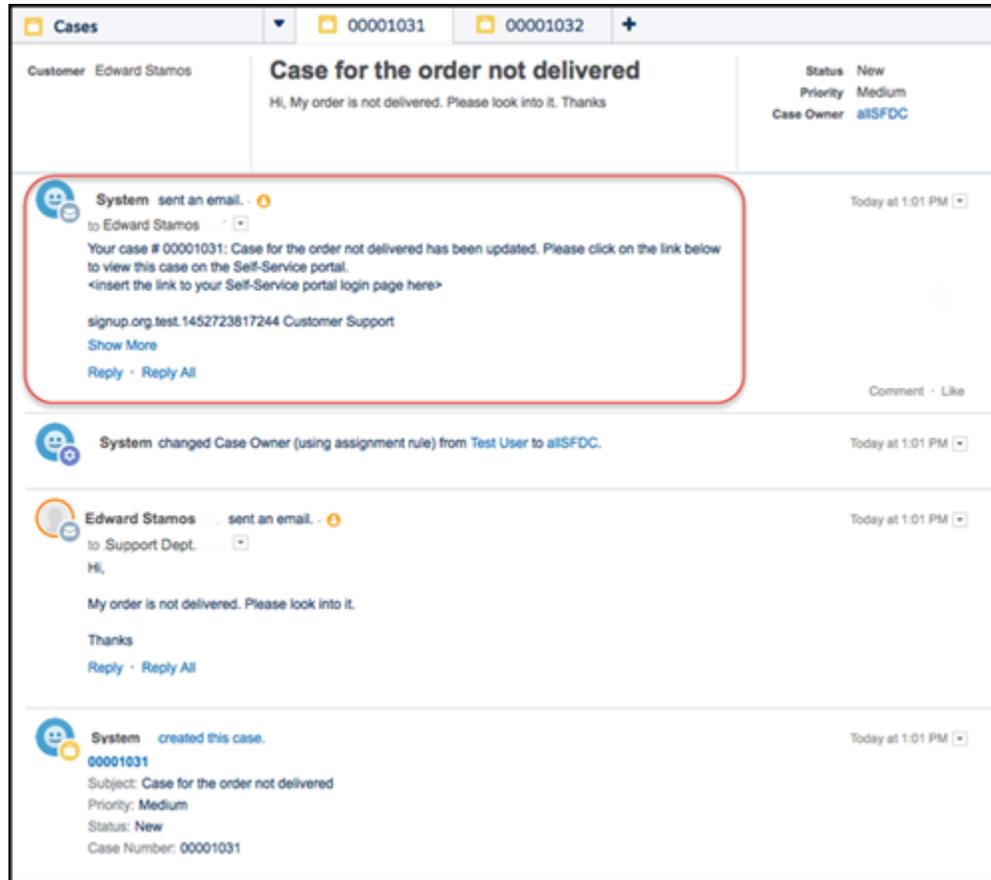
AND

"Customize Application"

The screenshot displays a Salesforce Case Feed for a case titled "Is the set available?". The case is owned by Edward Stamos and has a status of "New", priority of "Medium", and case owner of "aISFDC". The feed contains four items:

- System:** changed Case Owner (using assignment rule) from Billing to aISFDC. (Today at 1:02 PM)
- Edward Stamos:** sent an email to Support Dept. with the message: "Hello, I want to know if set is available to pre-order? Thanks". (Today at 1:02 PM)
- System:** sent an auto-response email to Edward Stamos: "Your case # 00001032: Is the set available? has been updated. Please click on the link below to view this case on the Self-Service portal. <insert the link to your Self-Service portal login page here> sign-up.org.test.1452723817244 Customer Support. Show Less". (Today at 1:02 PM)
- System:** created this case. (Today at 1:02 PM)

In the second screenshot, the auto-response feed item "Your case has been updated" appears *after* the customer's initial email. Feed items appear in this order when the setting is turned on.



If your org uses the Case Detail page, the email message record appears after the customer's first email in the Emails related list. By default, this setting is turned off.

1. From Setup, enter "Support" in the Quick Find box, then select **Support Settings**.
2. Click **Edit**.
3. Select **Create Auto-Response Record After Customer's First Email**.
4. Click **Save**.

SEE ALSO:

[Salesforce Help: Support Settings \(can be outdated or unavailable during release preview\)](#)

Lightning Experience Email Beautification

We've redesigned the Lightning Experience email action to save screen real estate and improve usability, making it even simpler for agents to send email.

Check out the new improved case feed email in Lightning Experience:

- Email address field labels appear to the left of the input boxes, saving valuable screen space. (Previously, they appeared above the input boxes.)
- In the email fields, names and email addresses of email recipients and sender appear in clear bubbles. (Previously, they were in plain text.)

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

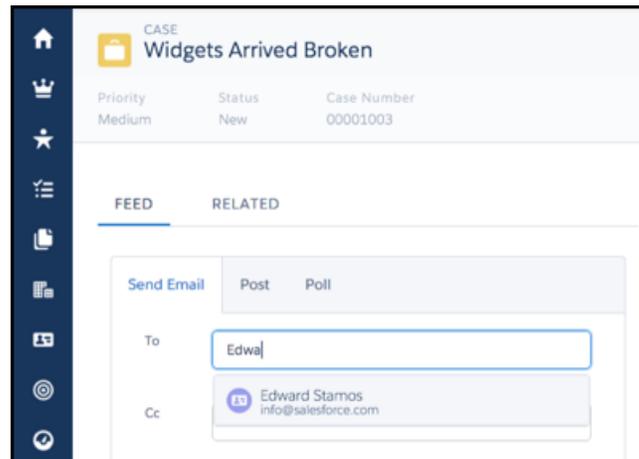
- Icons indicating the type of user—such as lead, opportunity, contact, or user—display next to the recipient's name or email address. (Previously, users weren't distinguished by type.)

Respond Even Faster to Customers with Type Ahead

Addressing emails in Case Feed just got faster. When an agent enters a few letters of a person's name or email address, Type Ahead automatically suggests matching names and addresses, just as in Gmail. If multiple names or email addresses with the same letters match the letters that the agent entered, a drop-down appears showing all matches across Contacts, Leads, and Users.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Display the From Field in the Email Quick Action

Now, you can add the From field to the email quick action Lightning Experience, so agents can see it when reading and writing emails in Case Feed.

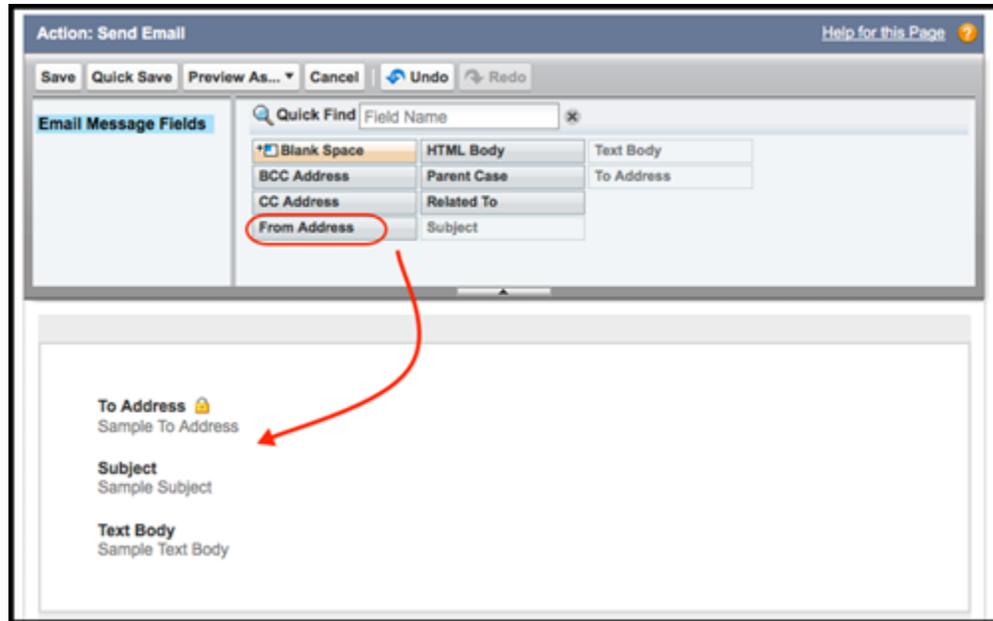
Previously, you couldn't expose the From field in the email quick action in Lightning Experience.

By default, the email action layout includes the standard fields—To, Subject, and Text Body fields—in that order. Optionally, you can add the Cc, Bcc, and From fields, so that they're available for agents.

Just drag and drop the From field into the email layout.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Entitlement Management

Entitlement management lets you and your support agents verify and fulfill customers' support contracts. In Summer '16, hierarchical service contracts and contract line items make it easier to represent complexities in your contracts with your customers.

IN THIS SECTION:

[Enforce Required Support Steps on Work Orders](#)

Step up your field service game with a new type of entitlement process that lets you add milestones to work orders. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

[Model Complex SLAs with Hierarchical Service Contracts](#)

Represent complex service-level agreements by making one service contract the child of another. This feature is available in Salesforce Classic only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with the Service Cloud

Enforce Required Support Steps on Work Orders

Step up your field service game with a new type of entitlement process that lets you add milestones to work orders. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

Entitlement processes now come in two flavors: Case and Work Order. Even if you don't use work orders, you'll notice a new `Entitlement Process Type` field when you create and view entitlement processes in your org. To learn more, see [Ensure Stellar Service with Milestones on Work Orders](#).

Model Complex SLAs with Hierarchical Service Contracts

Represent complex service-level agreements by making one service contract the child of another. This feature is available in Salesforce Classic only.

Hierarchical service contracts let you define relationships between service contracts. The new `Parent Service Contract` field and `Child Service Contracts` related list on service contract page layouts make it easy for you to create a hierarchy of service contracts.

You can also create hierarchies of contract line items on a service contract. Use the new `Parent Contract Line Item` field and `Child Contract Line Items` related list on contract line item page layouts.

Note:

- The contract line items in a hierarchy must all belong to the same service contract.
- If you delete a service contract that's part of a service contract hierarchy, keep in mind that its child service contracts are no longer linked to its parent service contract. The same is true for contract line items.

Assets

Assets help you track products that customers have purchased from you. In Summer '16, new related lists and delete capabilities make it easier for agents to scan an asset's history and view related support records. This feature is available in Lightning Experience, Salesforce Classic, the Salesforce1 mobile browser app, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 downloadable app for iOS, version 10.0 or later.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

IN THIS SECTION:

[View Child Assets and Maintenance History](#)

Two new related lists on asset pages give you an accessible view of an asset's child assets and linked work order line items.

[So Long, Kiddo: Delete Assets with Child Assets](#)

You can now delete an asset that has child assets. If you delete an asset that's part of an asset hierarchy, keep in mind that its child assets are no longer linked to its parent asset.

View Child Assets and Maintenance History

Two new related lists on asset pages give you an accessible view of an asset's child assets and linked work order line items.

Explore an Asset's Maintenance History

The new `Work Order Line Items` related list on assets provides a handy list of work order line items associated with a particular asset.

If you plan to associate assets with particular work order line items, add the new related list to Asset page layouts. You can then see all of the line items associated with a particular asset, giving you a snapshot of the asset's maintenance history. For example, if a particular asset required multiple visits from field technicians to repair it, it might be linked to multiple line items on work orders.

 **Note:** The `Work Orders` related list on asset page layouts still lists work orders associated with a particular asset.

Navigate a Hierarchy of Assets

The new `Child Assets` related list on asset pages lists all child assets, making it easy for you to view, add, and delete child assets.

Parent-child relationships between assets make it easier to represent complex assets in Salesforce. For example, one asset can have multiple components that are also represented as assets.

So Long, Kiddo: Delete Assets with Child Assets

You can now delete an asset that has child assets. If you delete an asset that's part of an asset hierarchy, keep in mind that its child assets are no longer linked to its parent asset.

Macros

Support agents who use Case Feed can use macros to complete repetitive tasks—such as selecting an email template, sending an email to a customer, and updating the case status—all in a single click. This feature is available in Salesforce Classic only.

IN THIS SECTION:

[Let Agents Search All Text Fields with Improved Search](#)

Searching for macros is a lot easier, now that support agents can search across all text fields in a macro. Previously, agents could only search in the name field of a macro.

Let Agents Search All Text Fields with Improved Search

Searching for macros is a lot easier, now that support agents can search across all text fields in a macro. Previously, agents could only search in the name field of a macro.

1. From Setup, enter "Macros" in the Quick Find box, then select **Macro Settings**.
2. Click **Edit**.
3. Select **Include all Macro text fields in search**.
4. Click **Save**.



Example: Suppose that an agent wants to find a macro where the description is "Return Policy - 30 days." The agent could search for "return policy" and see all macros that contain that phrase.

SEE ALSO:

[Salesforce Help: Macros Overview \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Search All Text Fields in Macros \(can be outdated or unavailable during release preview\)](#)

Organization Sync

Organization Sync lets you set up a secondary, synced Salesforce org where users can work when your primary org is unavailable. Summer '16 brings a reduction in sync-related emails and the ability to sync larger file posts. This feature is available in Salesforce Classic only.

IN THIS SECTION:

[Sync Larger Chatter File Posts and Comments](#)

Chatter file posts and comments up to 2 GB are now synced in Organization Sync. The previous limit was 38 MB. This feature is available in Salesforce Classic only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To manage settings for macros:

- "Customize Application"

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

No More Sync-Failure Spam

Your inbox just got tidier! Previously, admins were notified by email when a record failed to sync from one org to its linked org in Organization Sync. Now, failures appear only in the Organization Sync Log on the connection detail page. This feature is available in Salesforce Classic only.

Sync Larger Chatter File Posts and Comments

Chatter file posts and comments up to 2 GB are now synced in Organization Sync. The previous limit was 38 MB. This feature is available in Salesforce Classic only.

No More Sync-Failure Spam

Your inbox just got tidier! Previously, admins were notified by email when a record failed to sync from one org to its linked org in Organization Sync. Now, failures appear only in the Organization Sync Log on the connection detail page. This feature is available in Salesforce Classic only.

SOS

The SOS SDK gets a new user interface and an improved two-way video experience. These features are available for both iOS and Android.

IN THIS SECTION:

[SOS Gets a Makeover](#)

SOS has a new user interface that customers will love to use from within your mobile app when they work with an agent.

[Get a Little Closer: Two-Way Video with a Slick, New Interface](#)

In the world of online customer support, sometimes you wish the customer could show you what they're talking about. With two-way video in SOS, customers can share live video footage with either camera while speaking with agents. In the latest revision of this SDK, two-way video has a cleaner, minimalist interface.

EDITIONS

SOS is available for an additional cost in: **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

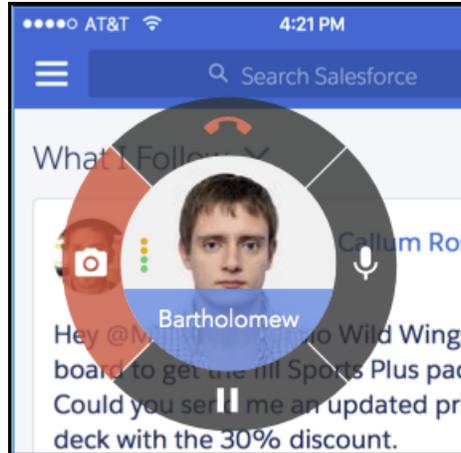
SOS Gets a Makeover

SOS has a new user interface that customers will love to use from within your mobile app when they work with an agent.

The new Halo UI shows your customer a small video feed of the agent, with action buttons surrounding the agent video feed. From this interface, a customer can perform several configurable functions, like start a two-way video session, mute the microphone, pause the session, or hang up. You can customize the colors to the interface, but it looks clean and modern right out of the box.

EDITIONS

SOS is available for an additional cost in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud



To learn more about SOS, see the [SOS Developer's Guide](#).

Get a Little Closer: Two-Way Video with a Slick, New Interface

In the world of online customer support, sometimes you wish the customer could show you what they're talking about. With two-way video in SOS, customers can share live video footage with either camera while speaking with agents. In the latest revision of this SDK, two-way video has a cleaner, minimalist interface.

The SOS SDK lets you access a customer's live camera feed during an SOS session. When a customer turns on two-way video, they see a full-screen camera view and the video feed from this view is sent to the SOS agent.

EDITIONS

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud



If a customer's device has both a front-facing and back-facing camera, they can swap cameras with a double-tap on the screen during the two-way video session. The front-facing camera is a great way to have a better conversation with a customer. The back-facing camera can be an amazing asset in a situation when the customer wants to show an agent exactly what is going on. The customer can turn on the flashlight with a touch and hold gesture.

To learn more about SOS, see the [SOS Developer's Guide](#).

Introducing Service Cloud Lightning Snap-Ins for iOS (Beta)

Access powerful Service Cloud features right from your iPhone or iPad with the new Service Cloud Lightning Snap-ins for iOS.

Note: This release contains a beta version of the Service Cloud Snap-ins SDK, which means it's a high-quality feature with [known limitations](#).

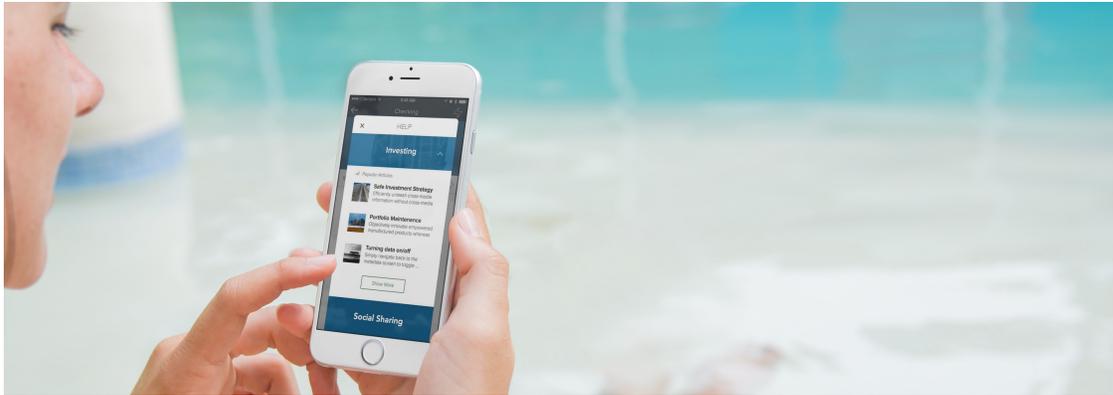
This Snap-ins SDK for iOS lets you incorporate your knowledge base, case management features, Live Agent text chat, and SOS video chat and screen sharing, right into your mobile device.

With the new SDK, you can be up and running with any of these features using just a few lines of code. You can even customize the interface so that it blends seamlessly into your existing native app.

Check out the [Service SDK landing page](#) for more information.

EDITIONS

Available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Snap-ins beta program.



Known Limitations

- The Android Service SDK is not currently available.
- Live Agent chat file transfer is not currently supported.
- Some features do not have full customization support.

Mobile: Do More On the Go

Give your field sales teams a boost with more intelligence built into Salesforce1. Reps and managers can drive business through meaningful insights, from top news stories about customers and competition to lively, interactive charts for tracking critical details. Is delivering first class support to customers on the go your mission? Help your agents see exactly what's going on and resolve cases faster than ever with two-way video and live camera feeds from the SOS SDK for iOS and Android.

IN THIS SECTION:

[Salesforce1: News and Insights, and Continued Productivity Offline](#)

Help your sales teams stay up to date on important records, activities, and conversations—from wherever they are—with the Salesforce1 mobile app. Reps get insights about important companies and industries, now assembled in one place with the News app. Managers and execs can easily track performance and critical details with Enhanced Charts, from tablets as well as smartphones. And for those times when there's no Internet connectivity? With the Offline Edit Beta feature, Salesforce1 downloadable app users can create and edit records, unimpeded by FAA regulations, capricious cellular signals, or bunker-like buildings.

[SOS SDK: An Improved Interface and Two-Way-Video](#)

SOS SDK for iOS and Android, the Service Cloud's mobile support solution, just got better. With improvements to the SOS interface and two-way video, your customers can get all the help they need, right from your mobile app.

[Salesforce Classic Mobile: Free Version No Longer Available for New Orgs and Some Existing Orgs](#)

With Summer '16, the free, restricted version of Salesforce Classic Mobile (also known as Mobile Lite or Salesforce Classic Lite) is no longer available for new orgs or for existing orgs that don't have this option enabled. But if your org has the free version of Salesforce Classic Mobile turned on when Summer '16, there's no change for you or your users.

[SalesforceA: More User Management Options with Version 3.2 for iOS](#)

Version 3.2 of SalesforceA for iOS is now generally available. You can now assign and remove users' permission sets on the go!

Salesforce1: News and Insights, and Continued Productivity Offline

Help your sales teams stay up to date on important records, activities, and conversations—from wherever they are—with the Salesforce1 mobile app. Reps get insights about important companies and industries, now assembled in one place with the News app. Managers and execs can easily track performance and critical details with Enhanced Charts, from tablets as well as smartphones. And for those times when there's no Internet connectivity? With the Offline Edit Beta feature, Salesforce1 downloadable app users can create and edit records, unimpeded by FAA regulations, capricious cellular signals, or bunker-like buildings.

EDITIONS

Available in: **All Editions**
except Database.com

IN THIS SECTION:

[Access the Salesforce1 Mobile App](#)

Your users have several options for accessing Salesforce1 on mobile devices.

[What's New in the Latest Salesforce1 Downloadable Apps](#)

They say good things come to those who wait. (iOS users, have we mentioned lately how virtuous you're looking?) Well, the wait is over. Just in time for summer, version 10.0 of the Salesforce1 downloadable apps is hitting the beach...and your users' mobile devices. So slip on your shades and check out all the new goodness coming your way.

[Salesforce1 Enhancements in This Release](#)

Our latest round of new and improved Salesforce1 features makes it easier to access Salesforce on the go.

[Salesforce1 Differences from the Full Salesforce Site](#)

The Salesforce1 mobile app doesn't have all the functionality of the full Salesforce site (Lightning Experience or Salesforce Classic). The mobile app also includes some features that aren't available in the full site. For the new and enhanced features included in this release, check if there are any differences between Salesforce1 and the full site.

[Salesforce1 App Development Overview](#)

Several Force.com platform enhancements support Salesforce1 development.

Access the Salesforce1 Mobile App

Your users have several options for accessing Salesforce1 on mobile devices.

- Install the Salesforce1 downloadable app on Apple® and Android™ mobile devices. Users can download the app from the App Store or Google Play™.
- Access the Salesforce1 mobile browser app from a supported mobile browser on Apple, Android, and Windows devices. This option doesn't require anything to be installed.

See [Requirements for the Salesforce1 Mobile App](#) for more details about supported devices and browsers.

What's New in the Latest Salesforce1 Downloadable Apps

They say good things come to those who wait. (iOS users, have we mentioned lately how virtuous you're looking?) Well, the wait is over. Just in time for summer, version 10.0 of the Salesforce1 downloadable apps is hitting the beach...and your users' mobile devices. So slip on your shades and check out all the new goodness coming your way.

Salesforce1 for iOS, Version 10.0

Beginning the week of June 13, 2016, the App Store starts serving up Salesforce1 for iOS, version 10.0.

 **Note:** Remember, [users must be running iOS 9.2 or later](#) to upgrade to this version of Salesforce1.

Here's what's new in Salesforce1 for iOS.

- [Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps \(Beta\)](#)
- [Get Enhanced Security for Salesforce1 for iOS with Mobile Device Management \(MDM\)](#)
- [New Color Palette for Salesforce1 for iOS](#)
- [See Helpful Labels in All Action Bars in Salesforce1 for iOS](#)
- [Display of Reports in the Salesforce1 for iOS Navigation Menu](#)
- [New Notes Formatting Bar in Salesforce1 for iOS](#)
- [Just Picture It—Visual Notes in Salesforce1 for iOS](#)
- [Send Email with SalesforceIQ Inbox](#)
- [Access Salesforce Knowledge Articles in Salesforce1 for iOS](#)
- [Streamline Field Service with Work Orders in Salesforce1 for iOS](#)
- [Use Field Service Lightning On the Go](#)
- [Track Purchased Products with Assets in Salesforce1 for iOS](#)

Salesforce1 for Android, Version 10.0

The Salesforce1 downloadable app for Android, version 10.0 will be released to Google Play the week of June 20, 2016 and gradually rolled out to customers over a couple of weeks.

Here's what's new in Salesforce1 for Android.

- [Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps \(Beta\)](#)
- [Send Email with SalesforceIQ Inbox](#)

Salesforce1 Enhancements in This Release

Our latest round of new and improved Salesforce1 features makes it easier to access Salesforce on the go.

 **Note:** The latest release of the Salesforce1 downloadable apps for Android and iOS is version 10.0. See [What's New in the Latest Salesforce1 Downloadable Apps](#) for more details.

The Salesforce1 mobile app is available for all editions, except Database.com, without an additional license. Your organization's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each Salesforce1 user.

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Device and Browser Support				
Remember, iOS 9.2 Is Required on iOS Devices		✓ (As of v10.0)		
New Android Tablet Support for the Downloadable App	✓			
New Windows 10 Phone Support for the Mobile Browser App			✓	
The Mobile Browser App Can Run in Some Unsupported Browsers on iOS Devices			✓	

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Internet Explorer 11 Retirement Impacts Windows 8 Phones Users			✓	
Remember, Support for the Mobile Browser App on BlackBerry Devices Ends with Winter '17			✓	
Data Access and Views				
Quickly See If Related Lists Include Records	✓	✓	✓	
Salesforce1 Sorts Related Lists Based on User Settings in Lightning Experience or Salesforce Classic	✓	✓	✓	
Navigation and Actions				
Display of Reports in the Salesforce1 for iOS Navigation Menu		✓ (New in v10.0)		✓
Change a Record's Owner	✓	✓	✓	✓
See Helpful Labels in All Action Bars in Salesforce1 for iOS	✓ (As of v8.0)	✓ (New in v10.0)	✓ (As of Winter '16)	
Search				
Spell Correction Expanded to More Objects	✓	✓	✓	
Search for People Based on Address and Title	✓	✓	✓	
Inactive Users Show Up in Search Results in Lightning Experience			✓	
Improved Currency Formatting in Search Results in Lightning Experience			✓	
Sales Features				
Find All News in One Place	✓	✓	✓	✓
Get Account Insights on Opportunities	✓	✓	✓	✓
See Company Logos on Accounts (Beta)	✓	✓	✓	✓
Track Relationships Between Accounts and Contacts (Generally Available)	✓	✓	✓	✓
Team Up on Accounts	✓	✓	✓	✓
Add a Default Opportunity Team with One Tap	✓	✓	✓	✓
Productivity Features				
Find Notes Faster by Sorting List Views	✓	✓	✓	
New Notes Formatting Bar in Salesforce1 for iOS		✓ (New in v10.0)		

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Just Picture It—Visual Notes in Salesforce1 for iOS		✓ (New in v10.0)		
See Further Into the Future from the Events Weekly View	✓	✓	✓	
Choose Between Record Types When Creating Events	✓	✓	✓	✓
See the Forest and the Trees on Task Lists in the Downloadable Apps (Tablets Only)	✓ (New in v10.0)	✓ (New in v10.0)	✓ (As of Spring '15)	
List Item Actions Replace the Action Bar on Task Lists (Tablet Only)	✓	✓	✓	
Placeholder Labels Fill Out Empty Fields in the Task List	✓	✓	✓	✓
Send Email with SalesforceIQ Inbox	✓ (New in v10.0)	✓ (New in v10.0)		
Customer Service Features				
Access Salesforce Knowledge Articles in Salesforce1 for iOS	✓ (As of v8.0)	✓ (New in v10.0)	✓	✓
Use Field Service Lightning On the Go	✓	✓	✓	✓
Streamline Field Service with Work Orders in Salesforce1 for iOS	✓ (As of v8.0)	✓ (New in v10.0)	✓	✓
Knowledge Is Power for Field Techs	✓ (As of v9.0)	✓ (New in v10.0)	✓	
Ensure Stellar Service with Milestones on Work Orders	✓ (As of v9.0)	✓ (New in v10.0)	✓	
Get Around Work Order Hierarchies with Ease	✓ (As of v9.0)	✓ (New in v10.0)	✓	
Enforce Required Support Steps on Work Orders	✓ (As of v9.0)	✓ (New in v10.0)	✓	
Track Purchased Products with Assets in Salesforce1 for iOS	✓ (As of v9.0)	✓ (New in v10.0)	✓ (As of Winter '16)	✓

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
View Child Assets and Maintenance History	✓ (As of v9.0)	✓ (New in v10.0)	✓	
So Long, Kiddo: Delete Assets with Child Assets	✓ (As of v9.0)	✓ (New in v10.0)	✓	
Reports and Dashboards				
Legacy Charts to Begin Phased Retirement in Winter '17, Full Retirement in Spring '17	✓	✓	✓	✓
View Enhanced Charts on Tablets (As Well as Phones)	✓	✓	✓	✓
Dress Up Your Data with New Enhanced Chart Types	✓	✓	✓	
Keep Donut, Pie, and Funnel Charts Readable by Combining Small Groupings	✓	✓	✓	
Easily Read Data-Dense Charts in Dashboard Components	✓	✓	✓	
Keep Filters When Drilling into Reports from Dashboards	✓	✓	✓	
View Custom Formula Field Images and Links in Salesforce1 Reports	✓	✓	✓	
Files				
Access and Share Box Files	✓	✓	✓	✓
Chatter				
Include Salesforce1 Download Badges in Chatter Email Notifications	✓	✓	✓	✓
More URLs Get Rich Media Previews	✓ (Partial)	✓ (Partial)	✓	
Salesforce Communities				
Access Knowledge Articles from Communities			✓	✓
Business Logic and Process Automation				
Run Flows from App Home Lightning Pages (Pilot)	✓	✓	✓	✓
Offline Support				
Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps (Beta)	✓ (As of v9.0)	✓ (New in v10.0)		✓
Access and Security				

Salesforce1 Enhancement	Android Downloadable App	iOS Downloadable App	Mobile Browser App	Setup in the Full Site
Get Enhanced Security for Salesforce1 for iOS with Mobile Device Management (MDM)	✓ (As of v8.0)	✓ (New in v10.0)		✓
Downloadable Apps Don't Share Authentication With In-App Browsers		✓		
Test Current Network Conditions		✓ (New in v10.0.2)		
General Enhancements				
New Color Palette for Salesforce1 for iOS	✓ (As of v9.0)	✓ (New in v10.0)		
Copy and Paste Text on Record Detail Pages	✓	✓	✓	
We've Switched to iOS and Android Date and Time Selectors	✓	✓	✓	
Shortcuts for Currency and Number Fields	✓	✓	✓	
Power Through Your Work with Efficient In-App Messaging			✓	
Close Popup Windows Like in Lightning Experience			✓	
Salesforce Spell Checker is Replaced by Browser-Based Spell Check			✓	
See More Record Data Without Scrolling	✓	✓	✓	

Salesforce1: Remember, iOS 9.2 Is Required on iOS Devices

As we shared with you in the Spring '16 Release Notes, Summer '16 marks the end of support for all versions of the Salesforce1 mobile app on iOS 9.1 and earlier. This change is because of a compatibility issue between the upcoming release of the Salesforce1 for iOS downloadable app, version 10.0 and older versions of iOS. To ensure a smooth transition to Summer '16, we recommend that your iPhone and iPad users update their devices to iOS 9.2 or later. Upgrading is especially important before installing Salesforce1 for iOS, version 10.0 because the new app won't appear in the App Store for devices with older OS versions.

After Summer '16, users with pre-iOS 9.2 devices can continue to work with previously installed versions of the Salesforce1 downloadable app. And users aren't prevented from accessing the Salesforce1 mobile browser app on earlier iOS versions. If users encounter Salesforce1 issues while working on an unsupported OS, however, the availability of support services depends on the source of the problem. Salesforce will address issues that can also be reproduced on supported iOS versions. But Salesforce no longer provides technical support, bug fixes, or enhancements to resolve issues that are specific to Salesforce1 running on an unsupported version of iOS.

Your users can easily install the latest version of iOS for free on their iPhone and iPad devices. For help upgrading iOS, see [Update the iOS software on your iPhone, iPad, and iPod touch](#) on the Apple Support site.

Salesforce1: New Android Tablet Support for the Downloadable App

To increase device options for Salesforce1 users, we now support use of the Salesforce1 for Android downloadable app on Samsung Galaxy Note 10.1 tablets, running Android 5.1.1 or later. Salesforce1 for Android works in portrait orientation but doesn't rotate into landscape orientation.

Salesforce1: New Windows 10 Phone Support for the Mobile Browser App

We've added Windows 10 support for the Salesforce1 mobile browser app. The mobile browser app is now available on Microsoft Lumia 950 phones when accessed from the Microsoft Edge mobile browser.

Salesforce1: The Mobile Browser App Can Run in Some Unsupported Browsers on iOS Devices

With Summer '16, your iPhone and iPad users have unsupported access to the Salesforce1 mobile browser app from Google Chrome for iOS and the Gmail for iOS app's webview. Previously, accessing Salesforce1 from either of these browser environments was blocked and users were directed to Salesforce Classic instead.

 **Important:** Salesforce supports use of the Salesforce1 mobile browser app in specific device and mobile browser combinations. Safari is the only mobile browser that's supported for iOS devices. (See [Requirements for the Salesforce1 Mobile App](#) in the Salesforce Help for more details.)

While we've opened up access to the mobile browser app from the iOS mobile browsers mentioned here, these environments are not tested or supported and users may experience issues. Salesforce doesn't provide technical support, bug fixes, or enhancements to resolve any issues that your users may encounter when using Salesforce1 in an unsupported mobile browser. Make your purchasing and Salesforce1 rollout decisions based solely on the currently supported mobile device and mobile browser combinations.

Salesforce1: Internet Explorer 11 Retirement Impacts Windows 8 Phones Users

Support for existing orgs to access the Salesforce1 mobile browser app (and Lightning Experience) from Microsoft Internet Explorer 11 ends December 16, 2017. Because Internet Explorer 11 is the only Salesforce1-supported mobile browser for Windows 8 phones, Salesforce1 support for Windows 8 phones will also end at the same time. Summer '16 includes a critical update that allows orgs to get a head start on transitioning users away from Internet Explorer 11. If you have Windows 8 phone users, we recommend that you define an upgrade plan for these users before you activate this critical update.

See [Retirement of Support for Accessing Lightning Experience and the Salesforce1 Mobile Browser App Using Microsoft Internet Explorer version 11](#) for full details.

As a courtesy to your Windows 8 phone users, when Salesforce1 mobile browser app access via Internet Explorer 11 is disabled, attempts to log in to Salesforce1 from Internet Explorer are redirected to Salesforce Classic. However, Salesforce doesn't support using Salesforce Classic in any mobile browser—including Internet Explorer 11 on Windows 8 phones.

We recommend that your Windows 8 phone users upgrade to Windows 10 and the Microsoft Edge mobile browser, or another supported device and mobile browser combination, when feasible. See [Requirements for the Salesforce1 Mobile App](#) in the Salesforce Help for the full list of Salesforce1-supported devices and browsers.

SEE ALSO:

[Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 \(Critical Update\)](#)

Salesforce1: Remember, Support for the Mobile Browser App on BlackBerry Devices Ends with Winter '17

As we announced in the Winter '16 Release Notes, support for using the Salesforce1 mobile browser app on BlackBerry 10 devices ends with Winter '17. For a smooth transition, we recommend switching your BlackBerry users to the Connect to Salesforce app, which is available from BlackBerry World.

For a refresher on the details, see [the original announcement in the Salesforce Winter '16 Release Notes](#).

Salesforce1: Quickly See If Related Lists Include Records

We know no one wants to waste time opening related lists just to see if they contain some data. So prepare your Salesforce1 users for the good news. The mobile app now includes an easy-to-read counter for each related list on a record's Related page. We show if a related list includes records. We show if a related list doesn't include any records. No more guessing. This feature is available in all versions of the Salesforce1 mobile app.



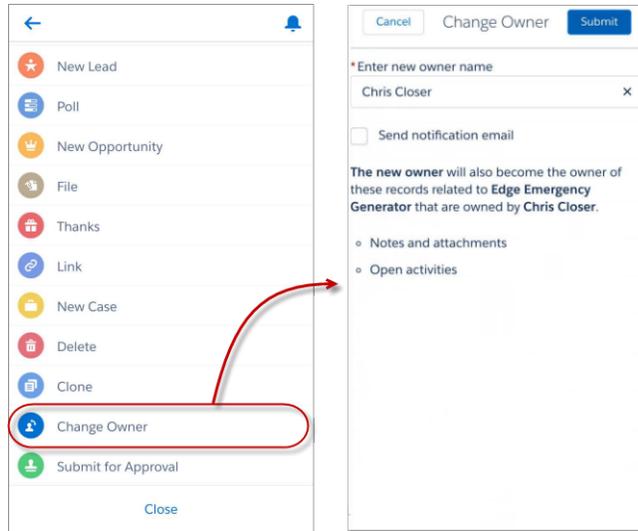
Salesforce1: Display of Reports in the Salesforce1 for iOS Navigation Menu

For version 10.0 or later of the Salesforce1 for iOS downloadable app, the Reports item in the Salesforce1 navigation menu now behaves the same as in the other Salesforce1 apps. If you don't add reports directly to the navigation menu, the Reports item is automatically included in the set of Smart Search Items that users access from the Recent section of the navigation menu.

Salesforce1: Change a Record's Owner

Being out of the office is no longer a blocker if your Sales professionals need to delegate records or reassign record ownership to keep your business processes moving forward. Salesforce1 users can now change record owners for accounts, campaigns, cases, contacts, leads, opportunities, work orders, and custom objects. The new **Change Owner** action, accessible from the action bar, is available in all versions of the Salesforce1 mobile app.

The **Change Owner** action appears only if the user has permission to change record ownership. And same as in the full Salesforce site, a user can give ownership of a record to another user as long as the new owner has a minimum of "Read" permission for the type of record being transferred. See [Change a Record's Owner](#) in the Salesforce Help for more details.



Salesforce1: See Helpful Labels in All Action Bars in Salesforce1 for iOS

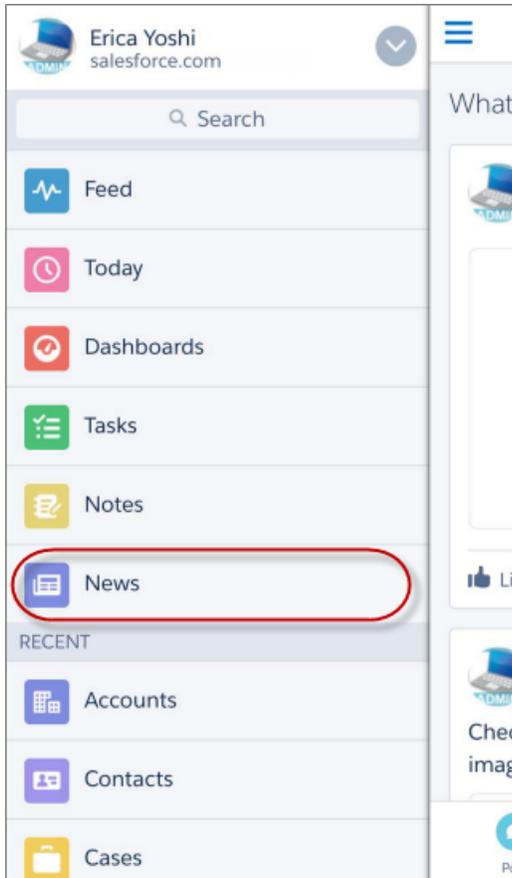
All action bars in the Salesforce1 downloadable app for iOS, version 10.0 now identify icons with labels. Since Winter '16, earlier versions of Salesforce1 for iOS displayed labels in some action bars but not all of them, including the main feed action bar. This enhancement brings Salesforce1 for iOS in sync with the way all action bars are displayed in the Salesforce1 mobile browser app and the Salesforce1 downloadable app for Android, version 8.0 or later.

Salesforce1: Find All News in One Place

The News app is a one-stop shop for news and other insights, so your reps can stay up to date about the companies and industries that matter most to them— even from the road. The insights shown are based on recently viewed accounts and opportunities, and on tasks and events for those accounts. Insights can also be related to accounts that are associated with users' upcoming mobile calendar events. This feature is available in all versions of the Salesforce1 mobile app.

EDITIONS

News available in: **Group, Professional, Enterprise, Performance,** and **Unlimited** Editions



If your reps don't see the News app in the Salesforce1 navigation menu, there are two things to check in Setup in the full Salesforce site. On the Account Settings page, make sure that Account Insights is enabled. Then on the Salesforce1 Mobile Navigation page, make sure that the News item is selected so it's included in the Salesforce1 navigation menu.

SEE ALSO:

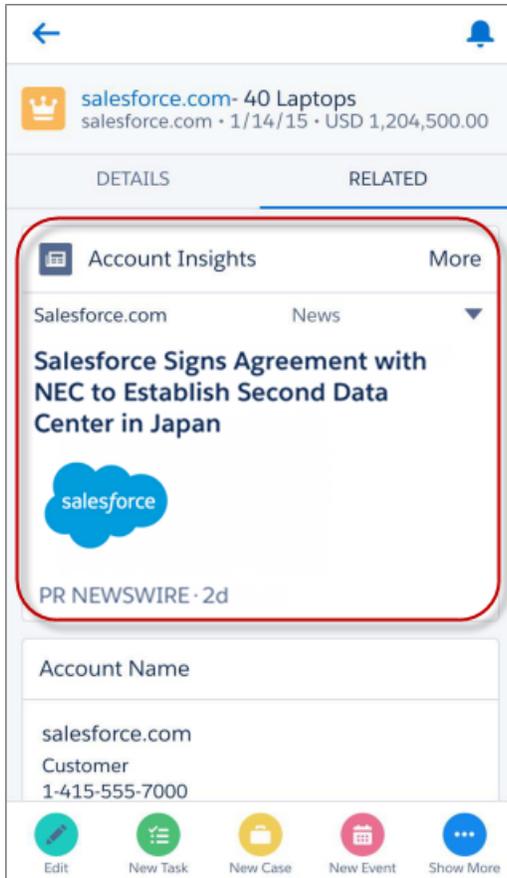
[Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Get Account Insights on Opportunities

Your on-the-go sales reps can see the latest breaking news about their accounts when viewing opportunity records. Insights are based on the account that's associated with the opportunity and are selected using the same criteria as for selecting insights for accounts. This feature is available in all versions of the Salesforce1 mobile app.

EDITIONS

Account Insights on Opportunities available in:
Group, Professional, Enterprise, Performance,
and **Unlimited** Editions



If you don't see insights on opportunities, from the full Salesforce site, go to the Account Settings page and enable Account Insights. And make sure that the Insights component is on your opportunity page layouts.

Salesforce1: See Company Logos on Accounts (Beta)

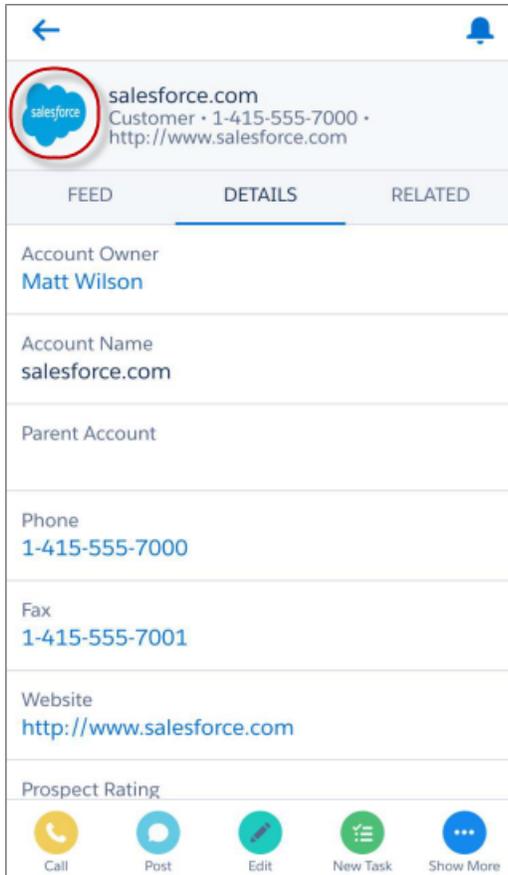
They say a picture is worth a thousand words, but there's just one word to describe the fact company logos are now shown on account records—awesome. This feature is available in all versions of the Salesforce1 mobile app.

 **Note:** This release contains a beta version of Account Logos that is production quality but has known limitations.

From Setup in the full Salesforce site, go to Account Settings. Then select the option to allow logos. Voilà! Logos are automatically displayed, when available, on US-based accounts. If you use Social Accounts, logos that reps have manually added through the social networks may be replaced with a fresher, more up-to-date logo.

EDITIONS

Logos on Accounts available in: **Group, Professional, Enterprise, Performance, and Unlimited Editions**



If you're not completely satisfied with a logo, for any reason, contact Salesforce Customer Support to remove the logo from the account.

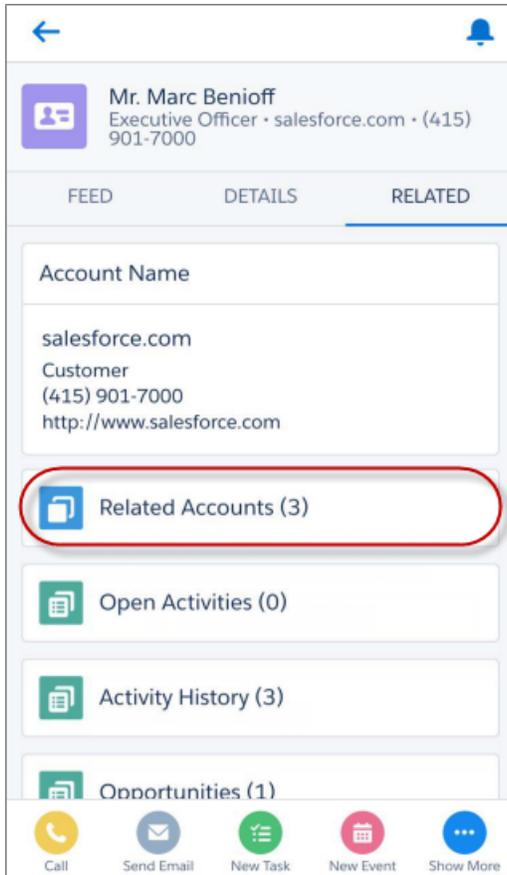
Salesforce1: Track Relationships Between Accounts and Contacts (Generally Available)

While on the go, sales reps can associate a single contact record to multiple accounts to easily track the relationships between the people and businesses they work with. This feature is available in all versions of the Salesforce1 mobile app.

It's not uncommon for a person to work with more than one company. A business owner can own more than one company. A consultant can work on behalf of multiple organizations. Use Contacts to Multiple Accounts to capture these relationships in Salesforce without creating duplicate records.

EDITIONS

Contacts to Multiple Accounts available in:
Group, Professional, Enterprise, Performance,
and **Unlimited** Editions



Enable and set up Contacts to Multiple Accounts in the full Salesforce site. For details, see [Let Users Relate a Contact to Multiple Accounts](#).

SEE ALSO:

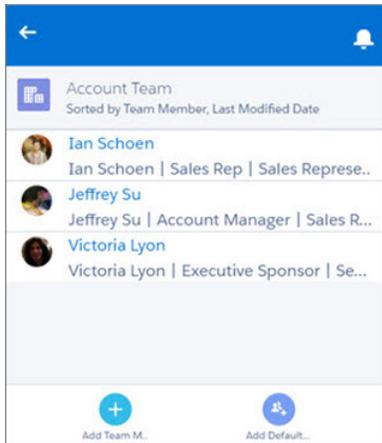
[Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Team Up on Accounts

Coordinate and simplify a sales team's access to records for their accounts with account teams in Salesforce1. Account team members have increased access to the account and its related records. This feature is available in all versions of the Salesforce1 mobile app.

Tap the Account Team card to get detailed information about the team's members, add coworkers to the team, or add the record owner's default account team. Tap a team member's name to change their role or adjust their access level, or remove the member from the team.

If you don't see account teams on accounts, enable the teams you want to use in the full Salesforce site. Individual users can set up their own default account teams for accounts in their personal settings.



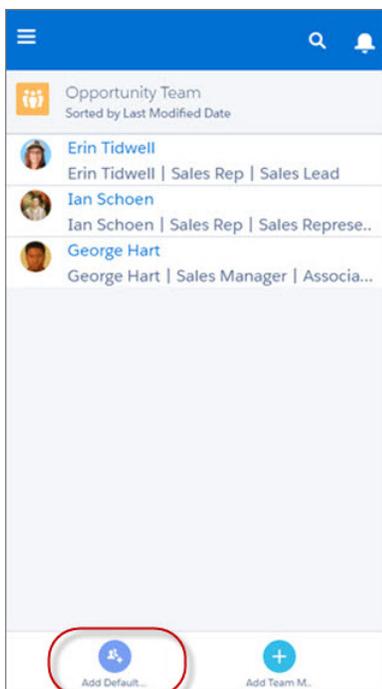
SEE ALSO:

[Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Add a Default Opportunity Team with One Tap

We've made opportunity teams even better in Salesforce1. Now, the opportunity owner or someone above the owner in the hierarchy can add the opportunity owner's pre-defined, default opportunity team by tapping **Add Default Team**. This feature is available in all versions of the Salesforce1 mobile app.

If you don't see opportunity teams on opportunities, enable the teams you want to use in the full Salesforce site. Individual users can set up their own default opportunity teams in their personal settings.



SEE ALSO:

[Salesforce1 Differences from the Full Salesforce Site](#)

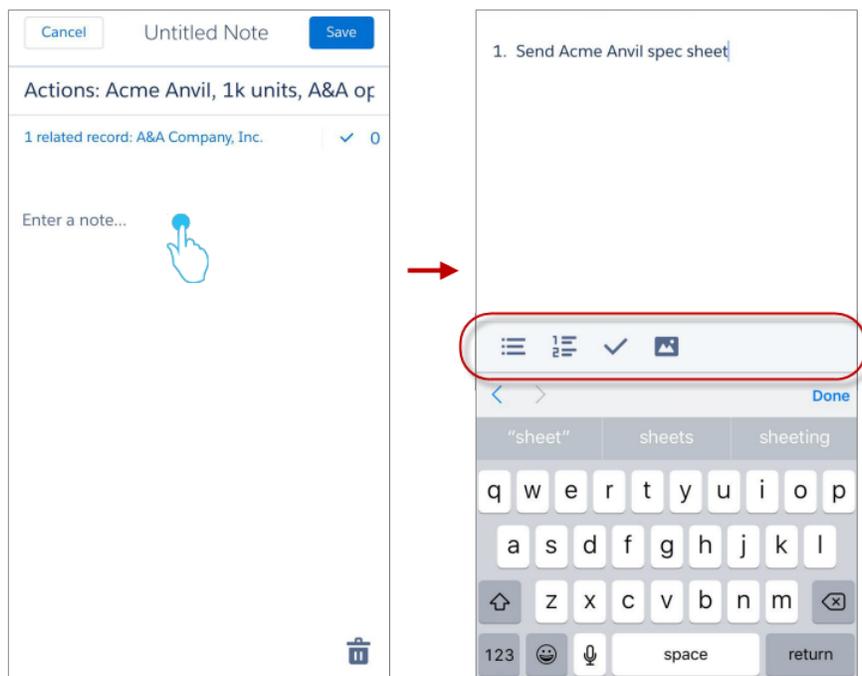
Salesforce1: Find Notes Faster by Sorting List Views

On the go professionals can find their notes more quickly and with less scrolling on small, mobile devices. Notes list views now include the same sorting options that are available for other list views in Salesforce1. Users can control the organization of notes lists by sorting according to a desired column of information, in ascending or descending order. This feature is available in all versions of the Salesforce1 mobile app.

Salesforce1: New Notes Formatting Bar in Salesforce1 for iOS

With version 10.0 of the Salesforce1 downloadable app for iOS, users can still apply rich text formatting to notes. But now the formatting bar is hidden until a user is actually entering text. Which means there's more room to see content when simply reviewing a note. And being able to see more on a mobile device is always a good thing. (This change doesn't apply to Salesforce1 for Android or the Salesforce1 mobile browser app. The notes formatting bar remains visible at the top of notes accessed in these apps.) This feature requires that Notes, the enhanced note-taking tool, is enabled for your org.

To apply rich text formatting to a note in Salesforce1 for iOS, simply tap the body of the note. The formatting bar appears above the keyboard.



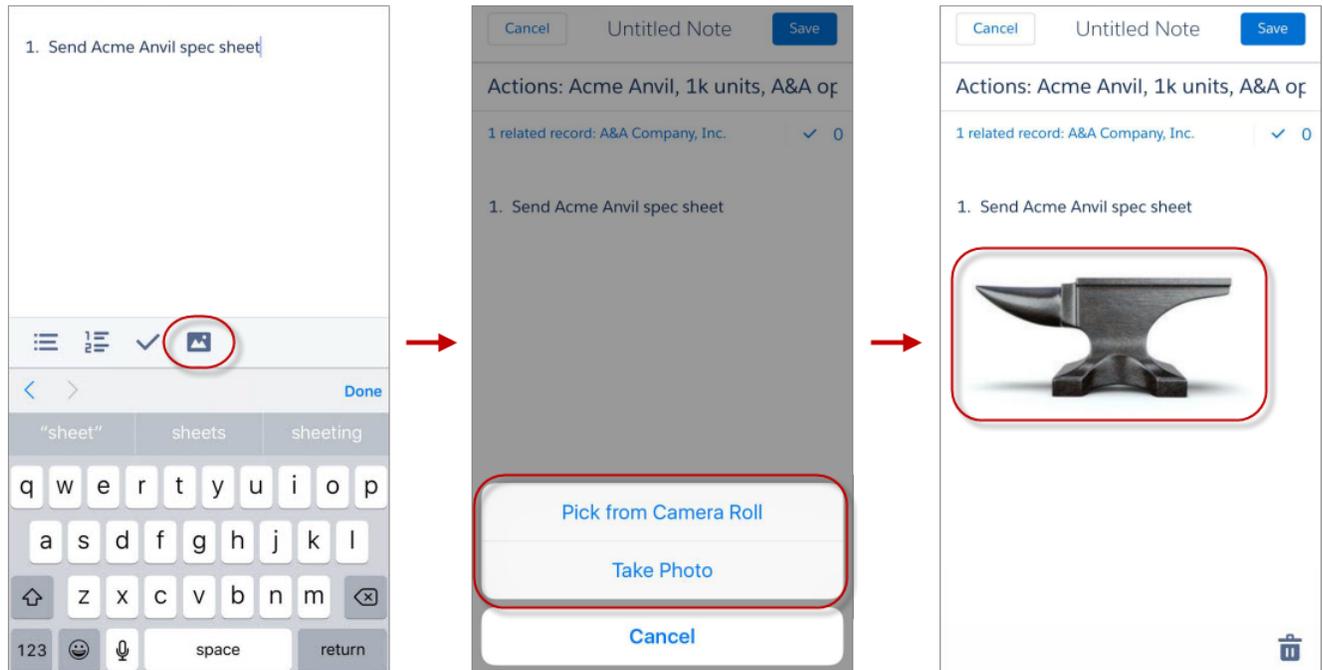
SEE ALSO:

[Salesforce1: Just Picture It—Visual Notes in Salesforce1 for iOS](#)

Salesforce1: Just Picture It—Visual Notes in Salesforce1 for iOS

Quickly take notes without typing a word! Now Salesforce1 for iOS users can add images directly to Salesforce notes, by taking a picture with the mobile device's camera or selecting an existing image on the device. Transcribe scribbles and diagrams from a whiteboard, save the contact information from a new lead's business card, document a problem with a product display—the options are limitless. This feature is available in the Salesforce1 downloadable app for iOS, version 10.0 or later, and requires that Notes, the enhanced note-taking tool, is enabled for your org.

Tap the body of the note then select  in the formatting bar.



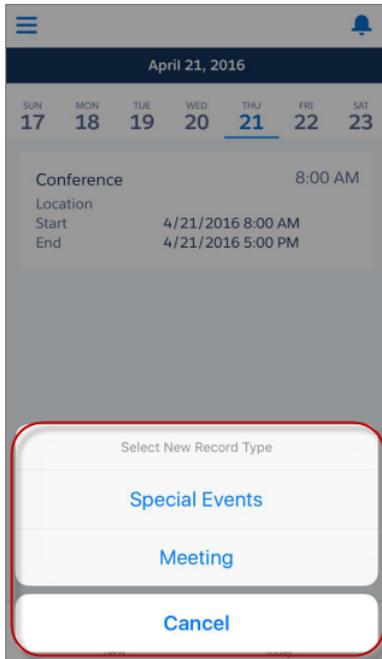
Salesforce1: See Further Into the Future from the Events Weekly View

Who doesn't want more time? Well, here's more "time" for your Salesforce1 users. To improve on-the-go meeting management, the mobile app's weekly view of Salesforce events now shows up to 12 future weeks. (Previously users were limited to looking forward by four weeks.) This expanded weekly view helps users keep track of their schedule for the entire quarter, plus there's no more waiting to get back to the office to set up those meetings for further down the road. This feature is available in all versions of the Salesforce1 mobile app.

See [See Salesforce Events in a Weekly View](#) for more information about the Events weekly view in Salesforce1.

Salesforce1: Choose Between Record Types When Creating Events

If your org has defined record types for events, your Salesforce1 users can now create any of the custom events that they have permission to work with. Previously users were limited to creating events with the default record type. This feature is available in all versions of the Salesforce1 mobile app (and Lightning Experience too).

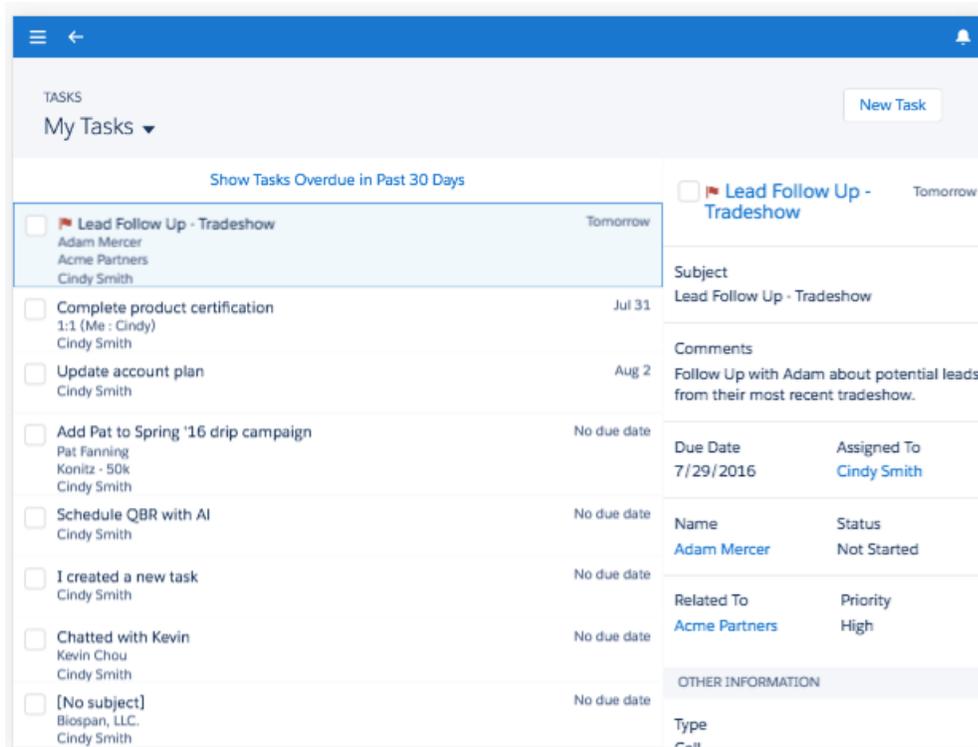


Salesforce1: See the Forest and the Trees on Task Lists in the Downloadable Apps (Tablets Only)

Salesforce1 downloadable app users working on tablets no longer need to switch back and forth between task lists and task details. Now users can see a task list, plus the details of a selected task, together on the same page. Just tap a task in the list on the left and review the task information on the right. This feature was previously available in the Salesforce1 mobile browser app and is now also available in version 10.0 or later of the Salesforce1 downloadable apps.

EDITIONS

Tasks available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



SEE ALSO:

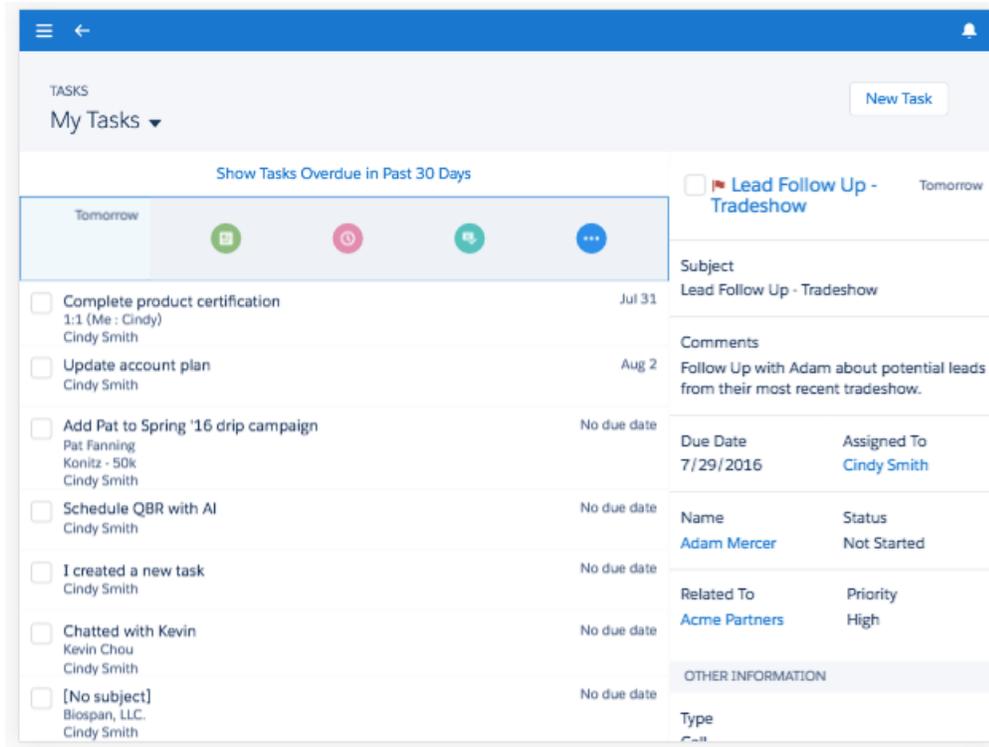
[Salesforce1: List Item Actions Replace the Action Bar on Task Lists \(Tablet Only\)](#)

Salesforce1: List Item Actions Replace the Action Bar on Task Lists (Tablet Only)

To give your mobile sales reps more room to work on their tasks, we removed the task list action bar when Salesforce1 is accessed on a tablet. But fear not, users can still take action on specific tasks using the handy list item actions that we added to Salesforce1 several moons ago. Simply swipe to the left on a task in the list to reveal the available actions. This change appears in all versions of the Salesforce1 mobile app, on tablets only.

EDITIONS

Tasks available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



SEE ALSO:

[Salesforce Help: List Item Actions in Salesforce1](#)

[Salesforce Help: How Predefined Actions Are Ordered in the Salesforce1 Action Bar and List Item Actions](#)

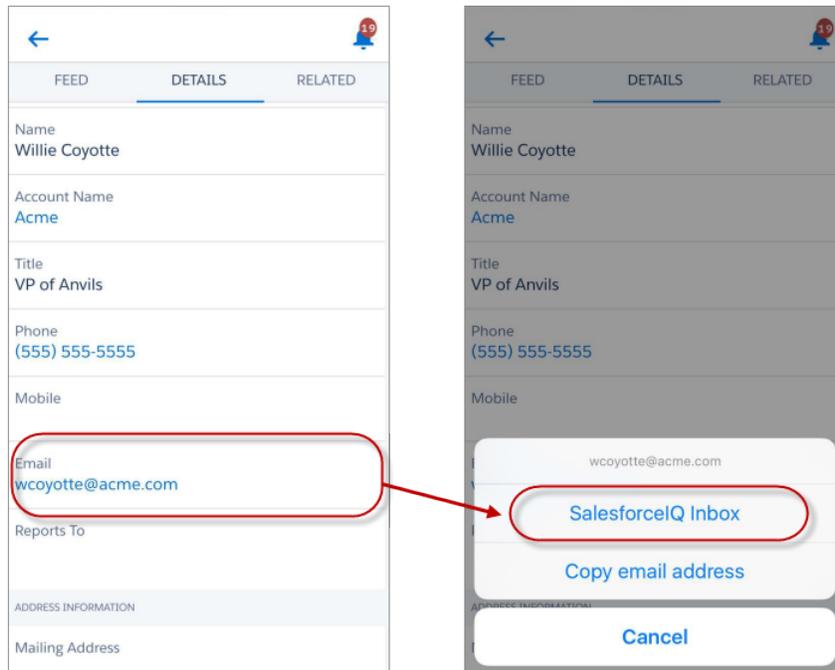
[Salesforce Help: Customize Actions with the Enhanced Page Layout Editor](#)

Salesforce1: Placeholder Labels Fill Out Empty Fields in the Task List

In the task list, tasks without subjects and due dates used to appear mostly blank, making it difficult for users to know what they were looking at. Now, the task list fills out these fields with placeholder information. Empty `Subject` fields now display the label “[No subject]” and the label is a link to the task’s detail page. Empty `Due Date` fields now display the label “No due date”. This enhancement is available in all versions of the Salesforce1 mobile app.

Salesforce1: Send Email with SalesforceIQ Inbox

Email is a critical tool for Sales teams. And now it’s easy for your reps to keep their inboxes connected with Salesforce from anywhere. Salesforce1 downloadable app users can send emails from SalesforceIQ Inbox, simply by tapping an email address. This feature is available in the Salesforce1 downloadable apps, version 10.0 or later.



 **Note:** In Salesforce1 for Android, this option is available only if SalesforceIQ Inbox is installed on the device. In Salesforce1 for iOS, if SalesforceIQ Inbox isn't already installed, the **SalesforceIQ Inbox** link opens the App Store so the user can install the app.

To learn more about SalesforceIQ Inbox, see [Introducing SalesforceIQ Inbox](#).

Salesforce1: Access Salesforce Knowledge Articles in Salesforce1 for iOS (Generally Available)

Salesforce Knowledge is now generally available in the Salesforce1 downloadable app for iOS, version 10.0 or later, as well as Salesforce1 for Android and the Salesforce1 mobile browser app. Agents can search for and read knowledge articles, see articles related to cases, and read comments in article feeds.

Users access the Articles home page from the Recent section of the Salesforce1 navigation menu. In Salesforce1 for iOS, the menu item is **Articles**. (It's also **Articles** in the mobile browser app, but it's **Knowledge Article Versions** in Salesforce1 for Android). To locate this item, it may be necessary to expand the Recent section by tapping **More**. Salesforce Knowledge is automatically included in the navigation menu as part of the Smart Search Items element. See [Salesforce1 Mobile App Navigation Menu](#) in the Salesforce Help for information about how the navigation menu is populated.

Users can search for articles from the Articles home page or using global search. When searching from the Articles home page, search results show promoted search terms, highlighted search terms, and snippets of relevant text, so users can quickly identify the best article and see how search results match search terms. These features are also available in global search results when using the Salesforce1 mobile browser app, but aren't available when using global search in the Salesforce1 downloadable apps.

EDITIONS

Salesforce Knowledge is available in **Performance** and **Developer** editions.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** editions.

SEE ALSO:

[Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Use Field Service Lightning On the Go

With Field Service Lightning available in Salesforce1, field technicians traveling between service appointments can view their schedule, navigate to service locations, and more. This feature is available in all versions of the Salesforce1 mobile app.

Here are some of the nifty things field technicians can do with Field Service Lightning in Salesforce1.

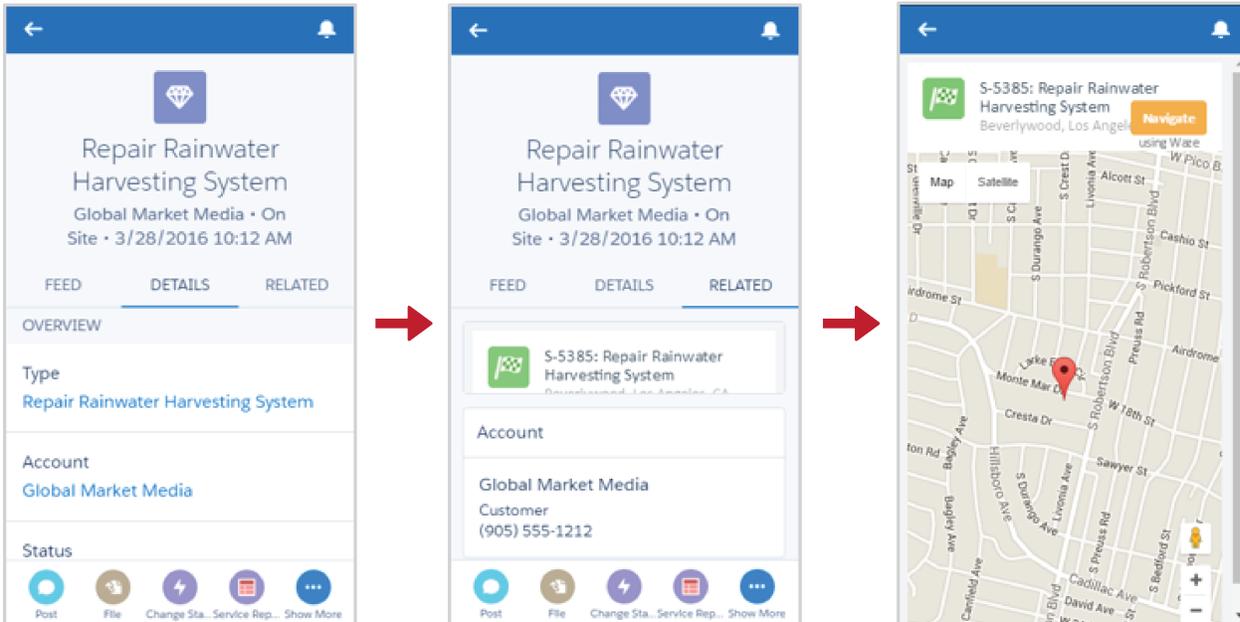
View Scheduled Services

View a list of services from the **Services** item in the Salesforce1 navigation menu. Technicians can set up customized list views from the full site ahead of time so they're able to focus on specific types of services, like those assigned to them or services with a certain status.

Tip: Since all a user's objects appear alphabetically in the Salesforce1 navigation menu, we recommend pinning the most-used Field Service Lightning items, such as **Services**, to the Recent section in the navigation menu for easier access. Do this from the search results screen in the full site.

Navigate to a Service Location

When viewing a service record in Salesforce1, technicians can locate the service address on a map. Select the **Related** tab on the service record, then select the address to navigate to the



Change a Service Status

Being in the field is no reason for your service records to get stale. Technicians can change a service status anytime. From the **Services** item, select **Change Status** in the action bar, and then select the new status. For example, after completing a service, a field technician can change the service status from *On Site* to *Completed*.

Note: The dispatcher console, which includes the service list, scheduling policy picker, Gantt view, and map, isn't available in Salesforce1.

To learn more about how Field Service Lightning can benefit your entire service organization, see [Achieve Greatness in the Field with Field Service Lightning \(Generally Available\)](#).

SEE ALSO:

[Salesforce1 Differences from the Full Salesforce Site](#)

EDITIONS

Field Service Lightning available for additional purchase in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce1: Streamline Field Service with Work Orders in Salesforce1 for iOS

Support technicians can now efficiently track repairs, standard maintenance, and other types of service while in the field. With Summer '16, work orders are now available in the Salesforce1 downloadable app for iOS, version 10.0 or later—as well as in Salesforce1 for Android, version 9.0 or later and the Salesforce1 mobile browser app.

Users access the Work Orders home page from the Recent section of the Salesforce1 navigation menu. To locate this item, it may be necessary to expand the Recent section by tapping **More**. Work Orders is automatically included in the navigation menu as part of the Smart Search Items element. See [Salesforce1 Mobile App Navigation Menu](#) in the Salesforce Help for information about how the navigation menu is populated.

To learn more about work orders, see [What Are Work Orders?](#) in the Salesforce Help.

SEE ALSO:

- [Knowledge Is Power for Field Techs](#)
- [Ensure Stellar Service with Milestones on Work Orders](#)
- [Get Around Work Order Hierarchies with Ease](#)
- [Enforce Required Support Steps on Work Orders](#)
- [Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Track Purchased Products with Assets in Salesforce1 for iOS

Support technicians and sales reps can now quickly check customers' assets (purchased products) from the field. With Summer '16, assets are now available in the Salesforce1 downloadable app for iOS, version 10.0 or later—as well as in Salesforce1 for Android, version 9.0 or later and the Salesforce1 mobile browser app.

Users access the Assets home page from the Recent section of the Salesforce1 navigation menu. To locate this item, it may be necessary to expand the Recent section by tapping **More**. Assets is automatically included in the navigation menu as part of the Smart Search Items element. See [Salesforce1 Mobile App Navigation Menu](#) in the Salesforce Help for information about how the navigation menu is populated.

To learn more about this object, see [Getting Started with Assets](#) in the Salesforce Help.

SEE ALSO:

- [View Child Assets and Maintenance History](#)
- [So Long, Kiddo: Delete Assets with Child Assets](#)

Salesforce1: Legacy Charts to Begin Phased Retirement in Winter '17, Full Retirement in Spring '17

Legacy Charts have been part of the Salesforce1 experience for many years. But with Spring '17, Enhanced Charts (the mobile version of Lightning Experience charts) will replace Legacy Charts in all versions of the Salesforce1 mobile app. Join us in wishing Legacy Charts the best in their retirement. Perhaps they'll take up golf?

Here's what the upcoming retirement of Legacy Charts means for your org.

- In Winter '17, Enhanced Charts will be turned on in Salesforce1 and all your Salesforce1 users will see Enhanced Charts instead of Legacy Charts. If you prefer to continue using Legacy Charts, then you can turn off Enhanced Charts in Setup.
- In Spring '17, Salesforce1 will only feature Enhanced Charts. You won't be able to toggle them on or off in Setup.

EDITIONS

Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

- Orgs created in or after the Summer '16 release, already feature Enhanced Charts in Salesforce1. The option to toggle Enhanced Charts on and off doesn't appear in Setup.
- Legacy Charts retirement doesn't affect charts in the full Salesforce site (Salesforce Classic and Lightning Experience).

If you haven't already turned on Enhanced Charts in Salesforce1, consider turning them on now. Give your mobile users interactive charts that they can tap on to see details, filter reports, and change chart types. To learn how, see [Show Enhanced Charts in Salesforce1](#) in the Salesforce Help.

For more information, see our [Legacy Charts Retirement](#) knowledge article.

Salesforce1: View Enhanced Charts on Tablets (As Well as Phones)

Your users run the Salesforce1 mobile app on phones and tablets. Shouldn't they have access to Enhanced Charts in Salesforce1 on both types of devices? Well, now they do! Enhanced Charts are available in all versions of the Salesforce1 mobile app, on tablets as well as phones.

Previously, Enhanced Charts were available on phones only. Now, when **Enable Enhanced Charts in Salesforce1** is turned on, all Salesforce1 users see Enhanced Charts on tablets and phones. This option is on the Reports and Dashboards Settings page in Setup.

EDITIONS

Enhanced Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

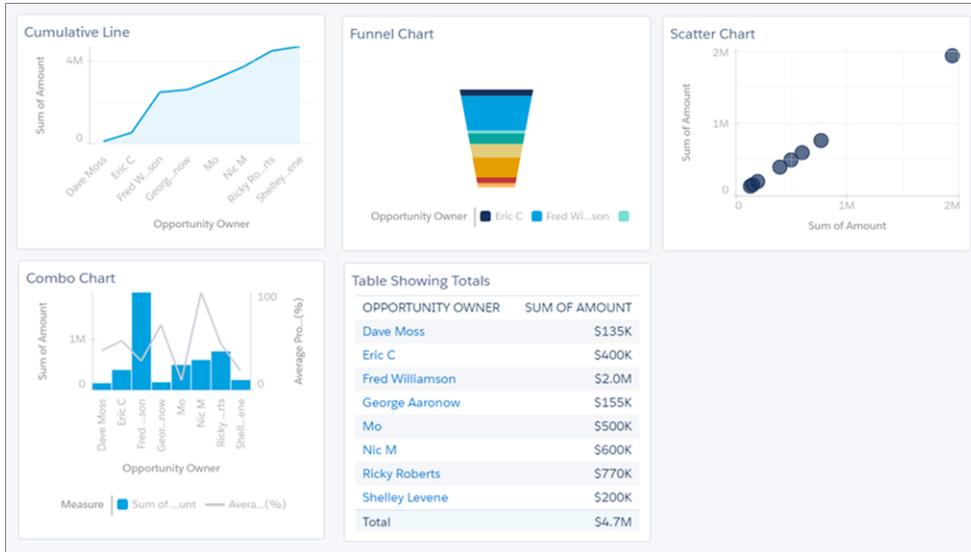


Salesforce1: Dress Up Your Data with New Enhanced Chart Types

Join us in welcoming cumulative line, funnel, scatter, combo, and table charts to all versions of the Salesforce1 mobile app! Funnel charts are available in both reports and dashboards. Cumulative line, scatter, combo, and table charts are available in dashboards only.

EDITIONS

Enhanced Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions



Salesforce1: Keep Donut, Pie, and Funnel Charts Readable by Combining Small Groupings

A chart with too many groupings can be hard to understand, especially on small mobile screens. To help make donut, pie, and funnel charts readable on phones and tablets, all versions of the Salesforce1 mobile app now support the **Combine Small Groups into "Others"** option. Set this option from the Salesforce Classic dashboard component editor. When enabled, all groupings that comprise less than 3% of the total are combined in a single grouping named Other.

EDITIONS

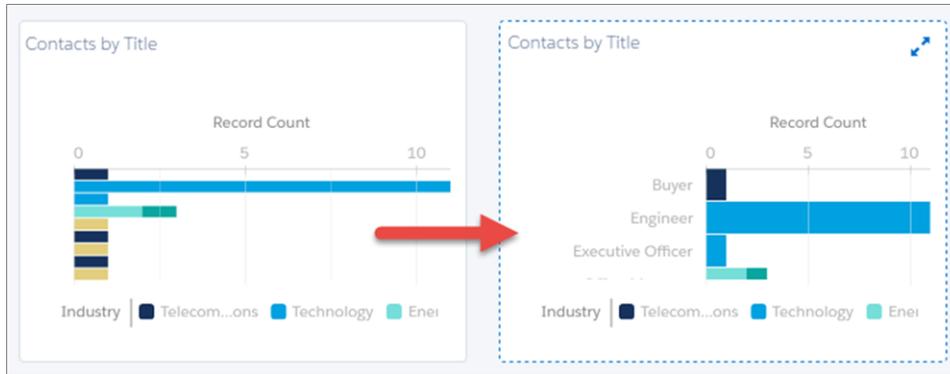
Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Salesforce1: Easily Read Data-Dense Charts in Dashboard Components

Sometimes a chart holds more data than we can adequately display inside a dashboard component, especially on mobile devices. If a Contacts component lists only four or five people, it's probably not a problem. But what if there are dozens of contacts? Problem solved! Simply tap a data-dense chart in a dashboard component to see a more readable, scrollable version. This feature is available in Enhanced Charts only, in all versions of the Salesforce1 mobile app.

EDITIONS

Enhanced Charts available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions



Salesforce1: Keep Filters When Drilling into Reports from Dashboards

Dashboard filters help users see data that matters to them. For example, Sarah, a sales rep, can filter a dashboard to show only her opportunities instead of the entire team's. Previously, if Sarah drilled into a report from a filtered dashboard component to get more details, the report opened without the dashboard filter applied. Now, when Sarah drills into a report from one of the filtered dashboard components, the report opens with the same filters applied. This enhancement is available in all versions of the Salesforce1 mobile app.

Filters are only kept when drilling into reports if the dashboard is filtered by tapping **Filter** in the dashboard action bar. Tapping a chart component in an enhanced chart and then drilling into the underlying report doesn't filter the report.

EDITIONS

Reports and Dashboards available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Salesforce1: View Custom Formula Field Images and Links in Salesforce1 Reports

Your users are used to seeing images and clicking links through custom formula fields in reports on the full Salesforce site. Previously, when they opened reports featuring images or links in Salesforce1, they saw HTML tags instead. Now, Salesforce1 reports with images and links derived from custom formula fields behave just like they do on the full Salesforce site. Viewing custom formula field images and links in reports is supported in all versions of the Salesforce1 mobile app, on tablets and phones.

Let's look at an example. On the full site, the custom formula field value

```
IMAGE("https://developer.salesforce.com/resource/images/trailhead-flogo.png", "image", 20, 16) displays an image in a report: . Previously, Salesforce1 displayed an HTML tag: . Now, custom formula fields in Salesforce1 reports behave just like they do in reports on the full Salesforce site. They both display an image.
```

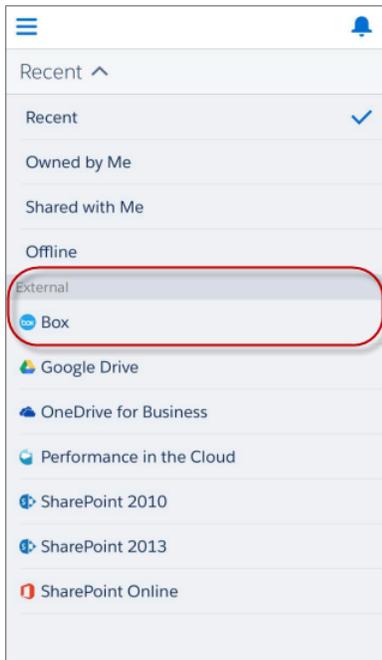
EDITIONS

Reporting on custom formula fields in Salesforce1 available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Salesforce1: Access and Share Box Files

If Salesforce Files Connect is set up for your org, your Salesforce1 users can now seamlessly access and share files from Box. Box is accessible in the Salesforce1 downloadable app for iOS, version 7.3 or later, the Salesforce1 downloadable app for Android, version 9.0 or later, and the Salesforce1 mobile browser app.

Salesforce1 users can browse and preview their Box files from Files home, share Box files with Salesforce users, feeds, or groups, and attach Box files to records.



Files Connect enforces the Box file-sharing rules, so users can choose to share only with specific people, with all people in the same Box domain, or to people outside the company.

By default, Box is an available external data source for all orgs in which Files Connect Cloud is supported. See [The Files Connect Setup Process](#) in the Salesforce Help for more details.

Salesforce1: Access Knowledge Articles from Communities

External users of communities that use the Salesforce Tabs + Visualforce template can now view articles from the navigation menu in the Salesforce1 mobile browser app. Community users can search for and read articles from the mobile app, but can't create, edit, delete, or archive them. The article fields that are available depend on the field-level security that's set on the article type. Community users can't access articles from the Salesforce1 downloadable apps.

EDITIONS

Files Connect is available in:
Enterprise, Performance, Unlimited, and Developer Editions

EDITIONS

Communities available in:
Enterprise, Performance, Unlimited, and Developer Editions

Salesforce Knowledge available in: **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud. It's available for an additional cost in **Enterprise** and **Unlimited** Editions.

Salesforce1: Run Flows from App Home Lightning Pages (Pilot)

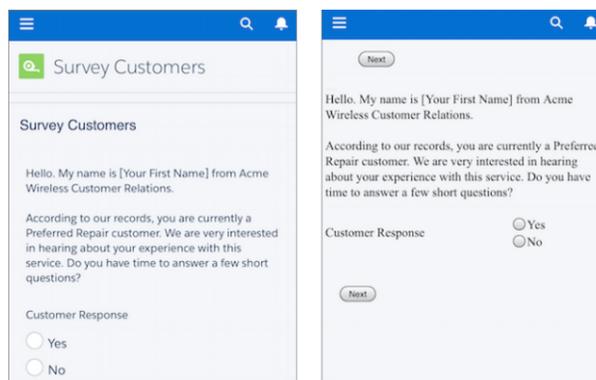
Let your users run Lightning-styled flows from the Salesforce1 mobile app by adding flows to App Home Lightning pages. It's easy to do with the point-and-click Lightning App Builder. App Home Lightning pages are supported in all version of the Salesforce1 mobile app.

Note: We provide the Flow Lightning Component to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. The Flow Lightning Component isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for the Flow Lightning Component in the [IdeaExchange](#).

Previously, you could add a flow to the Salesforce1 navigation menu by embedding it in a Visualforce tab. But that meant the page was styled like the Salesforce Classic interface. By adding flows to App Home pages in the Lightning App Builder, you get the Lightning styling for free!

Example:

A Flow in an App Home Page vs. a Visualforce Tab



When the App Home page is ready to go, remember to activate it. This allows you to add it to the Salesforce1 navigation menu, so your users can access the flow.

SEE ALSO:

[Give Your Lightning Experience and Salesforce1 Users the Power of Flows \(Pilot\)](#)

Salesforce1: Create and Edit Records While Offline Using the Salesforce1 Downloadable Apps (Beta)

No cellular signal? No problem! Salesforce1 downloadable app users can keep on truckin' with their work, whether they're in airplane mode 30,000 feet in the sky or deep underground in a subway tunnel. With Offline Edit, users are no longer tied to a network connection to keep their Salesforce data current. The beta version of this feature is available in version 10.0 of the Salesforce1 downloadable apps only.

Note: Version 10.0 of Salesforce1 for Android and Salesforce1 for iOS contains a beta version of Offline Edit, which means it's a high-quality feature with [known limitations](#). To enable this feature in your org, see [Enable Offline Edit for the Salesforce1](#)

EDITIONS

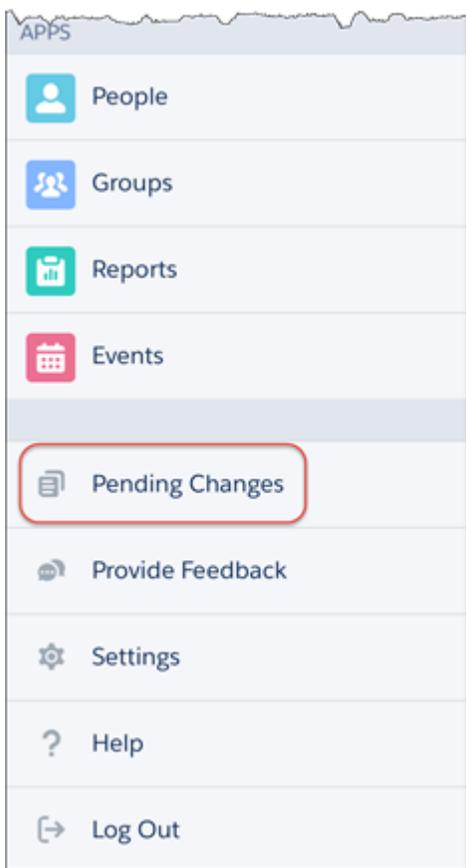
Available in: **Enterprise, Performance, Unlimited, and Developer Editions**

Downloadable Apps. Offline Edit isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular timeframe or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Offline Edit in the [IdeaExchange in the Success Community](#).

Offline Edit expands on the offline support your Salesforce1 downloadable app users are already using. As in previous releases, the downloadable apps cache recently accessed records so users can access important details without a network connection. And now when you enable Offline Edit, your users can also create records for cached objects and edit or delete cached records while offline.

Note: If your Android users started out with the Offline Edit pilot, Salesforce1 for Android, version 10.0 and Summer '16 take the experience up a level. Users can now create and update Notes, as well as delete recently accessed records, while offline. And Salesforce1 helps users resolve sync issues, such as conflicting changes to the same record made by a different user.

When creating, editing, or deleting records while offline, all changes are listed on the Pending Changes page. This page is available from the Salesforce1 navigation menu.



When the user's mobile connectivity is restored, the changes listed on the Pending Changes page are automatically synced with Salesforce. Salesforce1 helps the user resolve any problems that prevent pending changes from syncing—such as validation errors or conflicting changes to the same record made by a different user.

Because Offline Edit is a beta feature, let's look at some important details before you take the plunge. Including how to enable enhanced offline support for your org.

SEE ALSO:

- [Unsupported Devices for Offline Edit in Salesforce1](#)
- [Enable Offline Edit for the Salesforce1 Downloadable Apps](#)
- [Data and UI Elements That Are Available When Salesforce1 Is Offline](#)
- [Visual Indicators When Salesforce1 Users Update Data Offline](#)
- [Salesforce1 Offline Edit Limitations](#)
- [Salesforce Help: Work Offline with the Salesforce1 Mobile App](#)

Unsupported Devices for Offline Edit in Salesforce1

Some of the older mobile devices that are still supported by the Salesforce1 downloadable apps aren't quite up to the task when it comes to Offline Edit. While users can continue to run Salesforce1 on these devices, using Offline Edit isn't supported.

- iPhone 5
- iPhone 5c
- iPad mini 2
- iPad mini 3
- iPad 4

See [Requirements for the Salesforce1 Mobile App](#) in the Salesforce Help for devices that are supported.

Enable Offline Edit for the Salesforce1 Downloadable Apps

Offline Edit is available to all Salesforce1 customers as a beta feature. This feature requires version 10.0 of the Salesforce1 downloadable app for Android or Salesforce1 downloadable app for iOS. To get started, enable the feature for your org.

From Setup, enter *Salesforce1* in the Quick Find box, then select **Salesforce1 Offline**. On the Offline Settings page, select `Enable offline create, edit, and delete in Salesforce1 (Beta)`.

This option requires that caching in Salesforce1 is enabled.

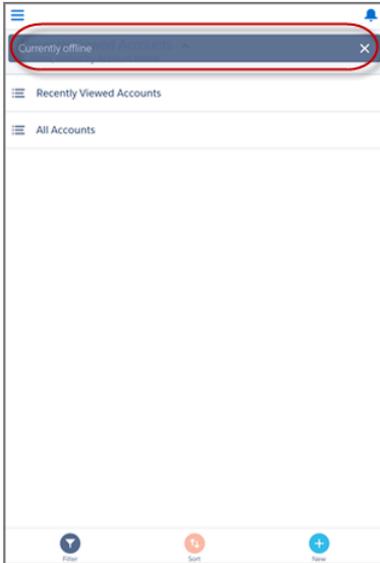
SEE ALSO:

- [Unsupported Devices for Offline Edit in Salesforce1](#)

Visual Indicators When Salesforce1 Users Update Data Offline

How do Salesforce1 downloadable app users know if they're suddenly working offline? How can users keep track of the records they've worked on while offline, and be confident that their updates make it back to Salesforce when they're online again? Let's look at the Salesforce1 visual indicators that answer these questions.

If a user's mobile device loses its network signal, a message briefly appears at the top of the screen.



Users can see all changes made while offline from the Pending Changes page. This page uses several indicators to show the status of offline changes.

-  : Displays while the mobile device is offline. Indicates that there are changes to sync when the device goes back online. After successfully syncing, records disappear from the Pending Changes page.
-  : Displays when the mobile device goes back online. Indicates that there are data conflicts that the user must resolve.
-  : Displays when the mobile device goes back online. Indicates that an unresolvable error occurred and the user's changes can't be saved.

These indicators also display on object home pages and in the highlights area on updated records.

See [Create, Edit, and Delete Records Salesforce1 While Offline \(Beta\)](#) in the Salesforce Help for more details about resolving problems when syncing pending changes back to Salesforce.

Data and UI Elements That Are Available When Salesforce1 Is Offline

With Salesforce1 caching and Offline Edit, users can work with many of their frequently accessed objects and records while offline. Here's the list of data and Salesforce1 user interface elements that are available offline.

Salesforce Data / Salesforce1 Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
Navigation Menu	Yes	n/a
Action Bar	Yes	Edit action: Yes Delete action: Yes Other actions: No
Global Search	Previous search results from current session	n/a
List Views	If viewed in current session	No

Salesforce Data / Salesforce1 Element	Available for Offline Viewing	Available to Create, Edit, or Delete Offline (Beta)
Records for Recent Objects	Yes, recently accessed records for the first five objects (excluding Files) in the Recent section of the Salesforce1 navigation menu	Yes, recently accessed records for the first five objects (excluding Files) in the Recent section of the Salesforce1 navigation menu
Records for Other Objects	If viewed in current session	If viewed in current session
Related Records	If viewed in current session	If viewed in current session
Salesforce Today	Main page and mobile event records, if viewed in current session	No
Salesforce Events	If viewed in current session	Create: No Edit and Delete: If viewed in current session
Tasks	Most recently accessed tasks from the first page of My Tasks list only	Most recently accessed tasks from the first page of My Tasks list only (The simplified New Task form must be disabled)
Notes	If viewed in current session	Create: Yes Edit: If viewed in current session Delete: No
Files	If viewed in current session	No
Dashboards (Enhanced Charts)	Most recently accessed only	No
Dashboards (Legacy Charts)	No	No
Feeds, Groups, and People	If viewed in current session	No
Notifications	If viewed in current session	n/a
Approvals (submit, approve, or reject)	No	No
Visualforce pages	No	No
Canvas Apps	No	No
Lightning Pages	No	No
Salesforce1 Settings	Yes	n/a



Note: A Salesforce1 session is the time between logging in and logging out of the app. Switching away from Salesforce1 doesn't end the session as long as the user doesn't log out.

Cached data is encrypted and stored in a secure, persistent data store.

As Offline Edit isn't generally available yet, there are some limitations that you should review and prepare your users to expect. See [Salesforce1 Offline Edit Limitations](#) for more information.

Salesforce1 Offline Edit Limitations

Offline Edit is available as a beta feature in version 10.0 of the Salesforce1 downloadable apps. As this offline support isn't generally available yet, there are some limitations that you should review and prepare your users to expect.

Create, Edit, and Delete Actions

- Create records using the **New** button on recently accessed object home pages. New record actions in an action bar (such as **New Task** or **New Contact**, or **New** on related lists) aren't supported offline.
- **Edit** and **Delete** actions in the action bar are available for cached records only.

All Other Quick Actions

- All other action bar icons, such as **Log a Call**, **Post**, or **Change Owner**, aren't supported offline.

Record Types for Recent Objects

- If your org has defined more than 15 record types for any of a user's recent objects (that is, the first five objects listed in the Recent section of the user's Salesforce1 navigation menu), only the first 15 record types are available when creating a record offline. And only records matching those 15 record types are editable while offline.

Lookups and Picklists

- Dependent lookups and picklists for a cached record aren't supported when offline, unless the user interacted with these elements before the record was cached.
- Lookup filters aren't supported when offline. Users can enter the name of the related lookup record when editing data offline but the app doesn't search for related looked records until the user's mobile device is back online.
- Complex page layouts, with a very large number of fields or many picklists, can result in records that are too large for Salesforce1 to cache. If a user doesn't see recently accessed records for an object when offline, this may be the reason why. If this becomes a problem for your users, we recommend re-evaluating the affected object's page layout to see if you can optimize it for mobile use.

Notes

- Notes that include images aren't available offline.
- Images can't be added to notes when working offline.
- Users can't relate notes to records when working offline.

Tasks

- Users can only create tasks offline if the simplified New Task form for Salesforce1 is disabled.
 1. From Setup, enter *Activity Settings* in the *Quick Find* box, then select **Activity Settings**.
 2. Deselect **Show simpler New Task form in Salesforce1**.
 3. Click **Submit**.
- Selecting or deselecting checkboxes on tasks isn't supported when offline.

Communities

- Salesforce Communities aren't supported when offline.

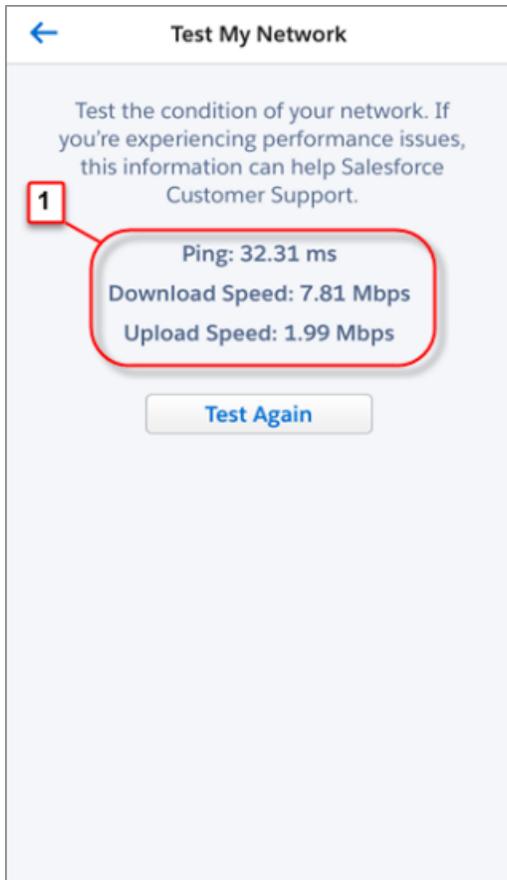
SEE ALSO:

[Salesforce1 Differences from the Full Salesforce Site](#)

Salesforce1: Test Current Network Conditions

Do your users ever ask why the Salesforce1 mobile app is snappy in some locations but a little sluggish in others? Obviously the condition of a network can affect how Salesforce1 performs. Now, users can test current network conditions directly from the app. This feature is available in the Salesforce1 downloadable app for iOS, version 10.0.1 or later.

If a user experiences issues with the latest Salesforce1 for iOS app, have him test his network so you can rule it out as the source of the problem. To test a network, open the Salesforce1 navigation menu, then select **Settings > Test My Network**. From here, users can test ping, download speed, and upload speed (1).



Here's what each test tells you about your user's network condition.

This Test ...	Tells You ...
Ping	How long it takes for the app to send a request to Salesforce and then get a reply. In general, lower ping times are better than higher ones. If there's no result at all, the network may not be connected to the Internet. Results are reported in milliseconds.
Download Speed	How long it takes the app to get data from Salesforce. In general, higher download speeds are better than lower ones. Results are reported in bits per second.

This Test ...	Tells You ...
Upload Speed	How long it takes the app to send data to Salesforce. In general, higher upload speeds are better than lower ones. Results are reported in bits per second.

Salesforce1: Get Enhanced Security for Salesforce1 for iOS with Mobile Device Management (MDM)

Are you concerned about users running Salesforce1 on unapproved devices? Are you fielding too many login problems from your mobile users? With the Salesforce1 downloadable app for iOS, version 10.0 or later, you can combine Salesforce1 with a Mobile Device Management suite and reap the benefits of enhanced security and a streamlined login process for your users. You get control over the distribution of Salesforce1 and over your users' devices. Enhanced security functions include certificate-based authentication, automatic custom host provisioning, and the ability to clear a user's clipboard whenever Salesforce1 is in the background. (Most of these options are also available for Salesforce1 for Android, as of version 9.0.)

 **Note:** SAML 2.0 (security assertion markup language) must be enabled and configured for your organization.

To get started, the first step is to configure your Mobile Device Management (MDM) suite. There are several MDM solutions in the market place. When you decide on the right product, work with your MDM provider to complete the configuration for your org.

When your MDM suite is up and running for your org, you're ready to implement the enhanced security features of the Salesforce1 for iOS app. Security options include:

Certificate-Based Authentication

Simplify Salesforce1 provisioning and your day-to-day mobile administration tasks by eliminating the need for your users to enter usernames and passwords to access Salesforce1. When you use MDM and X.509 identity certificates, your users can authenticate more efficiently. Or you can include a second factor in the login process.

You can also use your MDM suite to push the Salesforce1 app to your users—guaranteeing that the app is getting installed on company-managed devices only.

Automatic Custom Host Provisioning

Reduce mobile login issues by automatically configuring the login hosts available in Salesforce1. This spares your mobile users from needing to manually type long login host URLs—typically a frustrating and error-prone activity. And you can set up additional custom login hosts if you have users who access multiple Salesforce orgs.

You can also lock down the list of login hosts that users can access, which prevents users from adding their own hosts. (Requires Salesforce1 for iOS version 10.0.2 or later.)

Clear Clipboard Contents

You can add an extra layer of security by clearing the contents of a mobile device's clipboard whenever Salesforce1 is put into the background. Your users are probably copying and pasting sensitive data as a part of their day-to-day Salesforce1 activities. This enhancement ensures that any Salesforce data that winds up on the clipboard can't be used outside of Salesforce1.

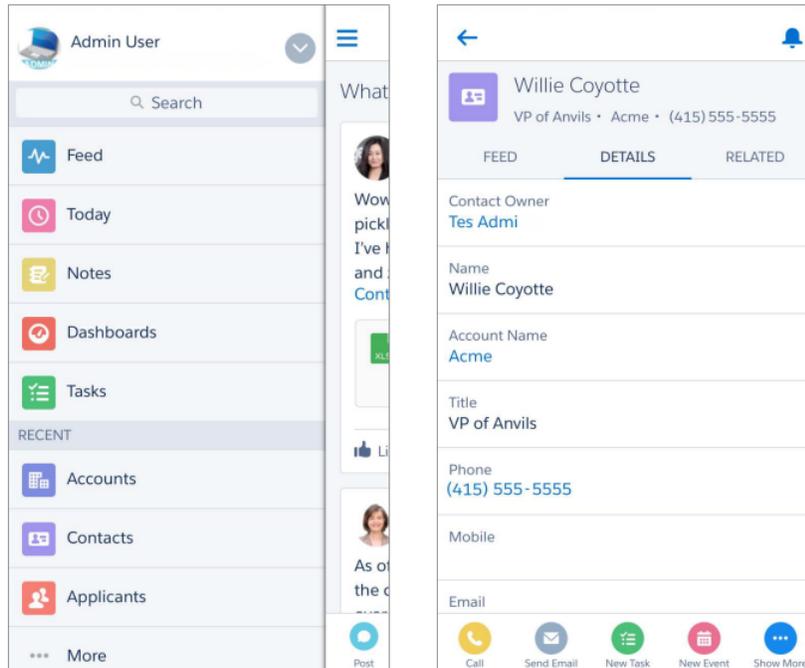
To enable these options, configure key-value pair assignments through your MDM suite. See the MDM chapter in the [Salesforce1 Mobile Security Guide](#) for full details.

Salesforce1: Downloadable Apps Don't Share Authentication With In-App Browsers

The Salesforce1 downloadable apps don't share authentication information with in-app browsers when accessing external URLs—that is, URLs that are outside the Salesforce1 `one.app` domain. With version 10.0 or later of the Salesforce1 downloadable app for iOS, the in-app Safari browser identifies itself with a unique user agent string and doesn't have access to cookies or other authentication information from Salesforce1. Navigation mechanisms that open external URLs (for example, Visualforce pages or components that call `sforce.one.navigateToSubject()`), usually result in the user needing to log in again from the in-app browser to see the page. The in-app browser in pre-10.0 versions of Salesforce1 for iOS didn't enforce the need for re-authentication.

Salesforce1: New Color Palette for Salesforce1 for iOS

The Salesforce1 downloadable app for iOS, version 10.0 introduces a new color palette that provides a consistent look and feel with Lightning Experience. Salesforce1 for iOS now uses white and cool-toned grays, injected with a hint of Salesforce blue, to create a lively and modern mood. The sparing use of color helps keep your content center stage and eliminates visual distractions for your users. (This new color palette is also used in Salesforce1 for Android, version 9.0 or later but isn't yet available in the Salesforce1 mobile browser app.)



Custom branding of Salesforce1 for iOS is still supported and any custom branding that you've already applied is still there for your iOS users after they upgrade to version 10.0. If your org hasn't already added its own unique stamp to Salesforce1, the new, neutral background of the mobile app gives you a great canvas from which to highlight your company's brand.

Salesforce1: Copy and Paste Text on Record Detail Pages

Typing on mobile keyboards can be error-prone and frustrating. So any time users can copy from existing data instead of typing, it's a good thing. Salesforce1 now includes support for the standard Android and iOS copy, cut, and paste gestures when viewing, creating, and editing record details. For example, a sales rep can copy field values from an account detail page and paste the values to fields when editing a contact or creating an opportunity. Pasting copied data is supported on edit pages and when using create and update quick actions. This feature is available in all versions of the Salesforce1 mobile app.

Salesforce1: We've Switched to iOS and Android Date and Time Selectors

We've replaced the original Salesforce1 date and time selectors with the date and time selectors provided by Android and iOS. So now Android users work with the interface they're used to, iOS users work with the interface they're used to, and no one has to keep track of another interface. This change applies to all versions of the Salesforce1 mobile app when run on iOS and Android devices.

The OS-specific selectors appear when interacting with fields that require date or time values, such as when setting a due date on a task, start and end dates on an event, or the close date on an opportunity.

*Subject
WWDC 2016

All-Day Event

*Start
Jun 13, 2016, 9:00 AM

*End
Jun 13, 2016, 6:00 PM

Related To

Name

< > Clear Done

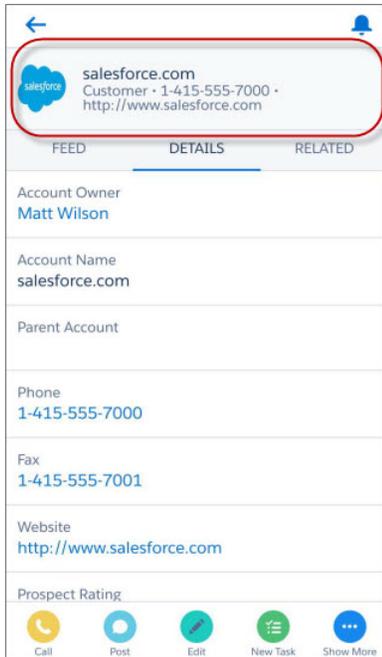
Fri Jun 10	6	57	
Sat Jun 11	7	58	
Sun Jun 12	8	59	
Mon Jun 13	9	00	AM
Tue Jun 14	10	01	PM
Wed Jun 15	11	02	
Thu Jun 16	12	03	

Salesforce1: Close Popup Windows Like in Lightning Experience

To better align the Salesforce mobile experience with the Lightning Experience interface, Salesforce1 users now close popup windows by tapping **Cancel** instead of an **X** icon in the upper-right corner of the window. This change appears in all versions of the Salesforce1 mobile app.

Salesforce1: See More Record Data Without Scrolling

We rearranged and shortened the highlights area on record detail pages so Salesforce1 users see more data without scrolling. This feature is available in all versions of the Salesforce1 mobile app.



This change doesn't apply to user profile or group records.

Salesforce1 Differences from the Full Salesforce Site

The Salesforce1 mobile app doesn't have all the functionality of the full Salesforce site (Lightning Experience or Salesforce Classic). The mobile app also includes some features that aren't available in the full site. For the new and enhanced features included in this release, check if there are any differences between Salesforce1 and the full site.

 **Note:** For complete details about the differences for all features available in Salesforce1, see [What's Not Available in the Salesforce1 Mobile App](#) in the Salesforce Help.

List Views

The Search box in the List View Controls menu in Lightning Experience, which allows users to search for a specific list view, isn't available.

Account Insights

When navigating to other records, more insights can become available. It takes longer for those insights to appear in the News app.

Account Autofill

Account suggestions aren't available when typing a company in the `Account Name` field.

Contacts to Multiple Accounts

Only the list item actions that are specific to the Account Contact Relationship object are available on the Related Accounts and Related Contacts related lists. So users see actions to edit or remove the account-contact relationship, but not to edit or delete the contact or account record, as is possible in Salesforce Classic.

From the Related Contacts related list, users can navigate to a contact record, but not an account record. Similarly, from the Related Accounts related list, users can navigate to an account record, but not a contact record.

In the Related Accounts related list, the `Account Name` field appears only if the user has access to the account. If they don't have access to the account, only the Account Contact Relationship fields appear.

Account Teams

Users can add, edit, or delete only one account team member at a time.

When the account owner is changed, the account team is retained.

The Display Access button isn't available.

Opportunity Teams

Users can add, edit, or delete only one opportunity team member at a time.

When the opportunity owner is changed, the opportunity team is retained.

The Clone and Display Access buttons aren't available.

Events and Calendars

When viewing events in Salesforce1, users can see a maximum of 12 weeks in the future and 4 weeks in the past.

Users can't create calendars from standard or custom objects, like they can in Lightning Experience.

Integrated Email

Salesforce1 doesn't display emails in the improved layout that's available in Lightning Experience.

Voice

The telephony features in Lightning Experience aren't available.

Salesforce Knowledge

Issue	Android Downloadable App, v8.0 or later	iOS Downloadable App, v10.0 or later	Mobile Browser App
Only published articles are available—not draft or archived articles.	■	■	■
Articles can't be created, edited, translated, or archived.	■	■	■
Articles can't be linked to cases. (But links that are set up from the full site can be viewed in Salesforce1 on the Related tab.)	■	■	■
Smart links aren't supported.	■	■	■
Article ratings aren't supported.	■	■	■
Tables are sometimes cut off on the right side when included in article rich text fields.	■		■
Compact layouts display the article type API name instead of the article type name. So users see the article type API name in the highlights area when viewing an article.	■	■	
When searching from the Articles home page, only articles in the user's language are returned and only if that language is an active Knowledge language (from Setup, Customize > Knowledge > Knowledge Settings). To see articles in another language, users can change to an active Knowledge language. From My Settings , use the Quick Find search box to locate the Language & Time Zone page.	■	■	
In global search, search results show articles in the language specified for the device, regardless of the active Knowledge language.	■		
Filtering search results by data categories, article type, validation status, or language isn't available.	■	■	■

Issue	Android Downloadable App, v8.0 or later	iOS Downloadable App, v10.0 or later	Mobile Browser App
In global search, articles don't appear in the list of recent records.	■	■	
In global search results, search highlights and snippets don't appear. These features are available in all versions of Salesforce1 when searching from the Articles home page.	■	■	
Knowledge articles aren't available when accessing communities via the Salesforce1 mobile app.	■	■	

Work Order Milestones

The milestone tracker is not available.

To manage milestones and entitlement processes, use the full Salesforce site.

Linked Articles

In Salesforce1, linked articles can't be accessed from feed items.

In Salesforce1, linked articles are view only. Technicians on the go can search the Knowledge base and read attached articles, but they can't attach or detach articles. To manage linked article settings and attach or detach articles, use the full Salesforce site.

The Linked Work Orders and Linked Work Order Line Items related lists on articles aren't available in Salesforce1.

Field Service Lightning

The dispatcher console, which includes the service list, scheduling policy picker, Gantt view, and map, isn't available in Salesforce1.

Mute from Feed Item Detail

Muting a feed item from its detail view isn't available.

Inline Images in Community Feed Posts

The option to add inline images to a feed post isn't available for Community members using Salesforce1.

General User Interface

Error messages that now stack in Lightning Experience don't stack in the Salesforce1 mobile browser app. Instead, messages appear one at a time.

SEE ALSO:

[Salesforce1 Offline Edit Limitations](#)

Salesforce1 App Development Overview

Several Force.com platform enhancements support Salesforce1 development.

- [API Support](#)

API Support

The Force.com APIs support Salesforce1 development. Unless otherwise noted, these enhancements for Salesforce1 development were made available in API version 37.0.

Improve App-Level Messaging with Powerful, Accessible Toasts

Jazz up your app's popup messaging with new attributes on the `force:showToast` API event. The new toasts entity is designed for mobile and desktop apps, and includes support for new features and enhanced user interface design.

SOS SDK: An Improved Interface and Two-Way-Video

SOS SDK for iOS and Android, the Service Cloud's mobile support solution, just got better. With improvements to the SOS interface and two-way video, your customers can get all the help they need, right from your mobile app.

The new Halo UI from SOS shows customers a small video feed of the agent, with several action buttons surrounding the agent video feed. And the new and improved two-way video interface makes resolving cases easier than ever for agents and customers alike.

For more details, see [SOS Gets a Makeover](#) and [Get a Little Closer: Two-Way Video with a Slick, New Interface](#).

EDITIONS

SOS is available for an additional cost in: **Enterprise, Performance, Unlimited, and Developer** Editions with the Service Cloud

Salesforce Classic Mobile: Free Version No Longer Available for New Orgs and Some Existing Orgs

With Summer '16, the free, restricted version of Salesforce Classic Mobile (also known as Mobile Lite or Salesforce Classic Lite) is no longer available for new orgs or for existing orgs that don't have this option enabled. But if your org has the free version of Salesforce Classic Mobile turned on when Summer '16, there's no change for you or your users.

For new orgs and existing orgs that are affected by this change, the **Enable Salesforce Classic Lite** option is removed from the Salesforce Classic Mobile Settings page in Setup.



Note: Don't disable the **Enable Salesforce Classic Lite** checkbox, even temporarily, if you want your users to retain access to the free version of Salesforce Classic Mobile. If you disable this option, the checkbox is immediately removed from the Salesforce Classic Mobile Settings page and unlicensed users are unable to use the Salesforce Classic Mobile app. Furthermore, if you deselect this option while users are running the app, the Salesforce data on their devices is erased the next time the devices synchronize with Salesforce.

If you disable the free version of Salesforce Classic Mobile in error, contact Salesforce Customer Support for assistance restoring access for unlicensed users.

EDITIONS

Available in: **Performance, Unlimited, and Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

SalesforceA: More User Management Options with Version 3.2 for iOS

Version 3.2 of SalesforceA for iOS is now generally available. You can now assign and remove users' permission sets on the go!

IN THIS SECTION:

[Assign and Remove Permission Sets on the Go](#)

When you view a user in SalesforceA, you can now manage the user's permission sets. A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles. This option is available in SalesforceA for iOS, version 3.2 only.

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

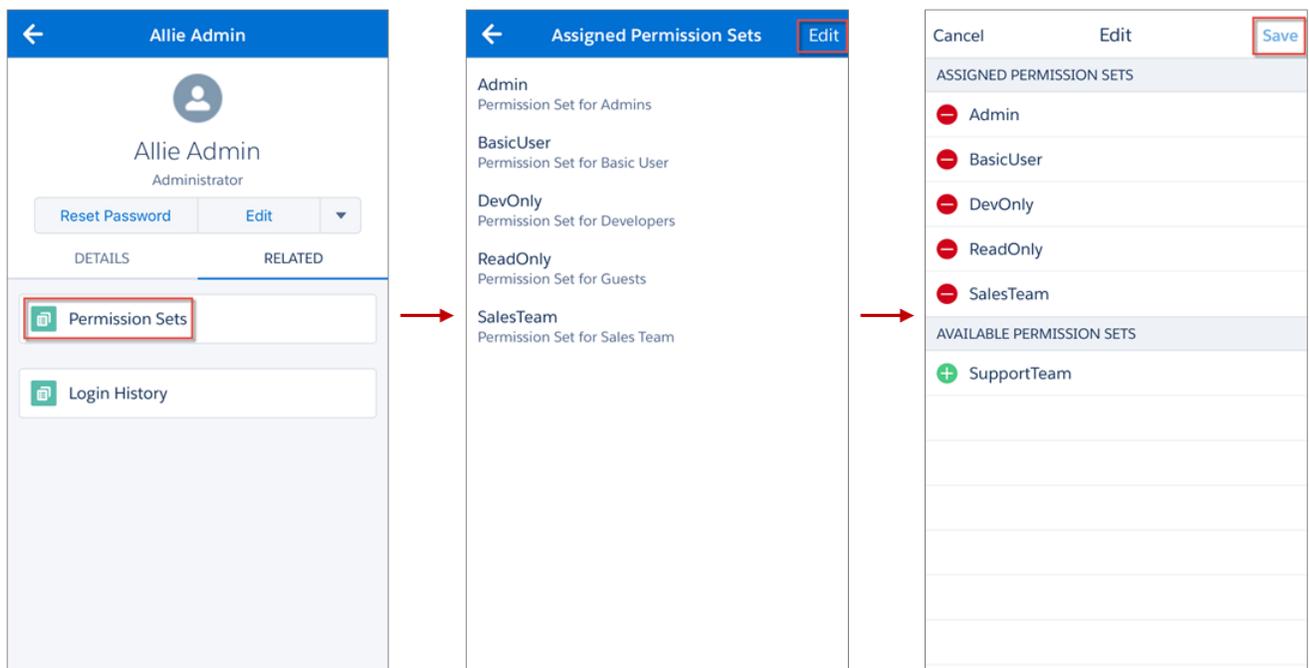
USER PERMISSIONS

- To use SalesforceA:
- "Manage Users"

Assign and Remove Permission Sets on the Go

When you view a user in SalesforceA, you can now manage the user's permission sets. A permission set is a collection of settings and permissions that give users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend users' functional access without changing their profiles. This option is available in SalesforceA for iOS, version 3.2 only.

1. From the user record, tap the **Related** tab.
2. Tap the **Permission Sets** card.
3. Tap **Edit**.
4. Assign or remove permission sets, then tap **Save**.



Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets. You can assign permission sets to various types of users, regardless of their profiles. See [Permission Sets](#) in the Salesforce Help for more information.

Communities: Pre-Moderation, Profile-Based Page Visibility, Global Search, and More

Greater control, more flexibility, and enhanced customizations—that's what you see throughout Communities in Summer '16. With pre-moderation, community managers can approve posts before they're published and freeze members who post inappropriate content. Profile-driven page visibility in Community Builder lets admins target community pages to members with specific profiles. And global search makes it easy for community members to search all the records available to them through the community. The list goes on...

EDITIONS

Available in: **Enterprise**,
Performance, Unlimited,
and **Developer** Editions

 **Note:** Lightning Experience doesn't support the global header, so internal users in your org can't switch between the Salesforce org and their communities from Lightning Experience.

IN THIS SECTION:

[Enhance Security with LockerService for Communities \(Critical Update\)](#)

This critical update enables LockerService security for Lightning components in Communities only. It's separate from the general LockerService critical update, which activates the LockerService security enforcements throughout your Salesforce org, but not in Communities.

[It's Time to Update Your Community Templates](#)

Effective Summer '16, we no longer support Koa, Kokua, or Napili template versions prior to Winter '16 (October 2015). To continue receiving Salesforce support for your template, update it to Summer '16. When you update your template, you also benefit from the latest Community Builder and template features. Why miss out on new Lightning components, page creation, custom layouts, and more?

[New Requirements for Allowing Guest Community Users to Log a Case](#)

To ensure your guest community users can securely log cases directly through contact support, enable Guest Access to the Support API and add NewCase to the quick actions.

[Chatter and Files in Community Templates](#)

Your community's feeds are going to look better than ever, with richer content and more flexibility. Make profiles and groups more engaging with high-resolution photos. Manage problem users with freeze, and set profile visibility. Insert inline images and code snippets in the publisher, and do more with file attachments.

[Community Templates](#)

We've taken flexibility up a notch for communities using the Napili template. Get creative with the new Tabs component, and move Featured Topics on any page you wish. Create broadcast groups for sending out messages. The Related Articles List component shows members articles that interest them. And with global search, community members can now search all the data they have access to.

[Community Builder](#)

Make your community's pages work harder for you. Create one version of a page for your customers and another for your partners, and control who sees each page based on their profile. Yes, you read that right! We've also enhanced Page Management by adding page duplication and search.

[Community Management](#)

Community managers love helping members make connections to get the most out of the community. But community managers hate policing the community for trolls and spammers. So we've added tools to make their job more about what they love and less about what they hate. Set up moderation rules to review and approve member-generated content. Establish rate limiting rules to monitor and limit how frequently content is created. You can even target specific users. Actionable Insights make it easier to manage spam attacks. Hey Mr. Spammer, your days are numbered.

Community Insights

Insights are now actionable! Community managers can act on their community activity directly from the report page. We also renamed the Insights section and reorganized some reports. To top it off, the updated Salesforce Communities Management package includes new Insights for reporting on posts pending review and frozen members.

Community Dashboards and Reporting

Easier reporting all around—that's what we're bringing you with this release. In communities using Salesforce Tabs + Visualforce, your groups now have their own built-in dashboard called Groups Engagement. All dashboards in Community Management refresh automatically, and you can edit them more easily. You can also tailor reports for your community.

Other Changes in Communities

Other important changes to Communities include security enhancements, support for end-user languages, and easier navigation between Community Builder and the Developer Console.

Enhance Security with LockerService for Communities (Critical Update)

This critical update enables LockerService security for Lightning components in Communities only. It's separate from the general LockerService critical update, which activates the LockerService security enforcements throughout your Salesforce org, but not in Communities.

LockerService for Communities will be activated everywhere in the Spring '17 release (scheduled for February 2017). Use this critical update to test LockerService in Communities independently from the rest of your Salesforce org prior to the auto-activation date.

LockerService enforces a number of security features in your code, which are detailed in the [general Lightning LockerService Security critical update](#). In addition, LockerService for Communities affects the markup used in the `<head>` of your community's pages.

Restrictions to page `<head>` markup in Community Builder

Inline scripts are not permitted. For example:

```
<script>
function doSomething() { }
</script>
```



Tip: To access the page `<head>` in Community Builder, click **Settings > Advanced > Edit Head Markup**.

Activate the Critical Update

We recommend that you test this update in a Developer Edition org to verify correct behavior of your custom Lightning components before enabling it in your production org.

To activate this critical update:

1. From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
2. For "Enable Lightning LockerService Security for Communities", click **Activate**.
3. Refresh your browser page to proceed with LockerService enabled for Communities.



Note:

- This critical update doesn't affect communities using the Salesforce Tabs + Visualforce template.
- IE11 is supported for Communities. However, because IE11 doesn't support CSP, we recommend using other supported browsers instead for enhanced security.
- Unlike the general LockerService critical update, prior to the auto-activation date, LockerService for Communities is *not* automatically enabled for:

- New orgs created after the Summer '16 release
- Developer Edition orgs
- Existing orgs without custom Lightning components

It's Time to Update Your Community Templates

Effective Summer '16, we no longer support Koa, Kokua, or Napili template versions prior to Winter '16 (October 2015). To continue receiving Salesforce support for your template, update it to Summer '16. When you update your template, you also benefit from the latest Community Builder and template features. Why miss out on new Lightning components, page creation, custom layouts, and more?

 **Important:** If you don't update your template, it doesn't affect your community. However, if issues arise with outdated templates, Salesforce Customer Support can't assist you.

If your community uses the Spring '16 version of the templates, sit back and relax. We automatically update your template version to Summer '16, so you can start adding the latest features to your community straight away.

If your community uses a Koa, Kokua, or Napili template that is earlier than Winter '16, read on because you have some housekeeping tasks.

 **Tip:** If you're not sure which template version your community uses, check out the Settings area in Community Builder.

The impact of updating a template depends on the version your community is using.

Template Type and Version	What to Expect When Updating to Summer '16
Winter '16 Koa, Kokua, or Napili	<ul style="list-style-type: none"> • Your customizations are maintained for all pages, except login pages. • Login pages retain branding but lose custom code or component customizations.
Prior to Winter '16 Koa, Kokua, or Napili	<p>Most component customizations and properties are overwritten. However:</p> <ul style="list-style-type: none"> • For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over. • For Napili, topic definitions carry over. <p>Most branding properties defined using the Branding Editor in Community Builder are maintained. However, sometimes your community's colors are reset to the default value. After you update the template, check the branding properties and update the ones that were reset.</p>

For information on component compatibility with older template versions, see "Which Components Can I Use with Each Template?" in the [Using Templates to Build Communities](#) guide.

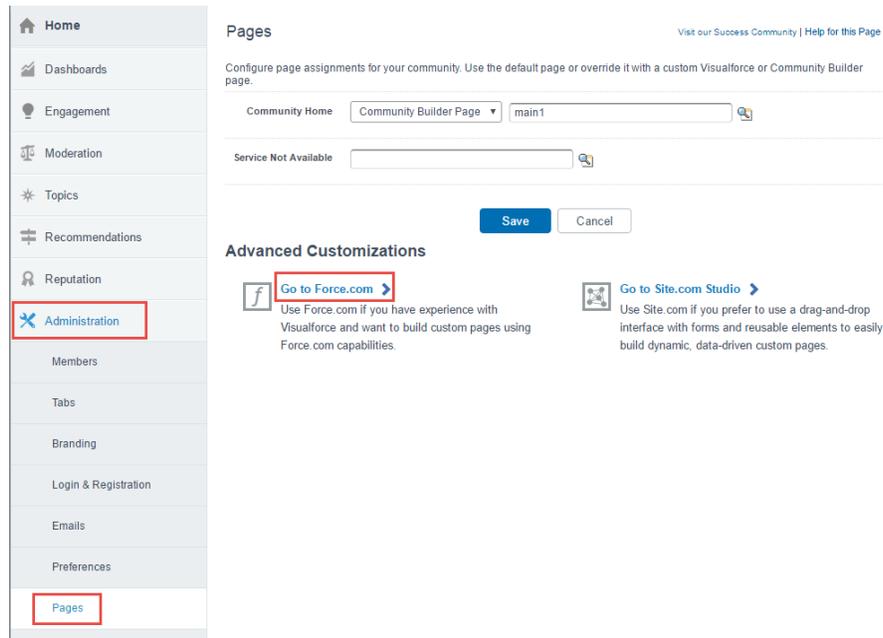
SEE ALSO:

[Salesforce Help: Update Your Community's Template in Community Builder](#)

New Requirements for Allowing Guest Community Users to Log a Case

To ensure your guest community users can securely log cases directly through contact support, enable Guest Access to the Support API and add NewCase to the quick actions.

1. From Setup, enter *Communities* in the *Quick Find* box, then select **All Communities**.
2. Select **Manage** next to the community you want your guest users to log cases via contact support.
3. On the left-hand panel, click **Administration**.
4. Click **Pages**.
5. Click **Go to Force.com**.



6. On the Sites Detail page, click **Edit**.
7. Enable **Guest Access to the Support API**.
8. Add *NewCase*, or a custom quick action to add cases, to the Selected Quick Actions.
9. Click **Save**.

 **Note:** You must take these steps on each community you have guest users enabled. It isn't global across all communities.

Chatter and Files in Community Templates

Your community's feeds are going to look better than ever, with richer content and more flexibility. Make profiles and groups more engaging with high-resolution photos. Manage problem users with freeze, and set profile visibility. Insert inline images and code snippets in the publisher, and do more with file attachments.

IN THIS SECTION:[Insert Inline Images in the Publisher](#)

Make your posts more fun and interesting to read! Community members in Napili-based communities can now add images within the flow of text in the rich text editor.

[Attach More Files to Your Posts](#)

Now you can attach not one, not five, but ten files to your posts. Hello, double digits! We've also made it easier to attach those files by preventing you from accidentally selecting too many.

[Add and Remove Files When Editing Posts](#)

Do you love being able to edit your posts, but wish you could add and remove files when you do? Stop dreaming and start editing! Fix that typo and while you're at it, remove that file you accidentally attached. Replace it with a new one. Add some more.

[Set Profile Visibility in Communities](#)

Your users can change their profile page in Communities just like they can in Salesforce Classic. No longer do they (or you) need to go to Salesforce Classic to update their name, title, photo, address, and so on.

[Improved Look and Feel for Compact Feed](#)

You'll like Compact Feed even more, with all the improvements we've made. When members ask the community a question, the new Compact Feed emphasizes the question and clearly shows which questions have a best answer. The increased action icon size, repositioned date and time, and added view counts are just cherries on top.

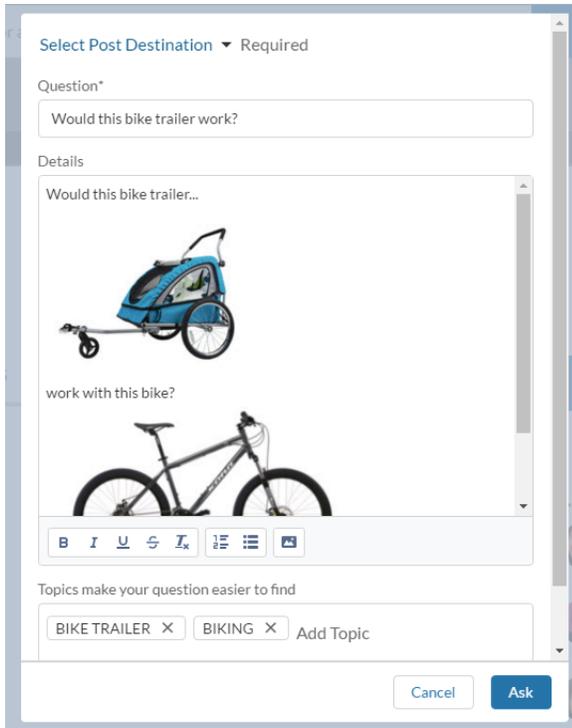
[Share, Revise, and Publish Formatted Code Snippets](#)

Good news for your community developers! Now there's an easy way to share and talk about code in a community feed. Code snippets let developers add code samples with syntax highlighting in the publisher's rich text editor. Your developers can also post code snippets using Chatter REST API and Chatter in Apex. Code snippets are available in communities based on the Napili template.

Insert Inline Images in the Publisher

Make your posts more fun and interesting to read! Community members in Napili-based communities can now add images within the flow of text in the rich text editor.

You've got something to say, and sometimes words aren't enough. Let's say you want to ask the community whether a certain bike trailer will work with your bike. Now you can use pictures to ask your question.



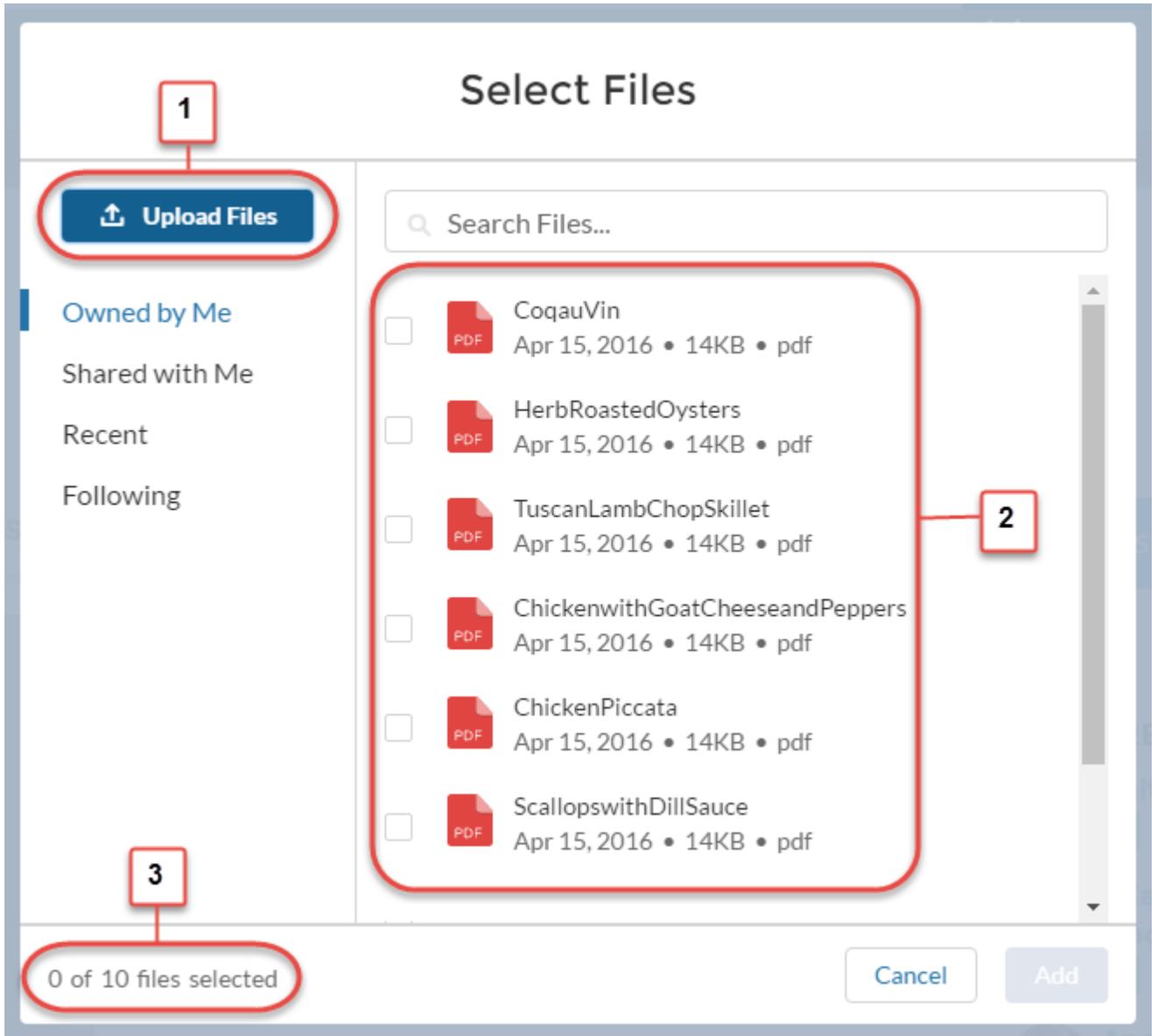
The screenshot shows a 'Select Post Destination' dialog box with a 'Required' dropdown. The 'Question*' field contains the text 'Would this bike trailer work?'. The 'Details' section contains the text 'Would this bike trailer...' followed by an inline image of a blue bike trailer, then the text 'work with this bike?' followed by an inline image of a bicycle. Below the details is a rich text editor with buttons for Bold (B), Italic (I), Underline (U), Link (L), Unlink (U), Bulleted List (List), Numbered List (List), and Image (Image). At the bottom, there is a 'Topics make your question easier to find' section with two tags: 'BIKE TRAILER' and 'BIKING', and an 'Add Topic' button. The dialog has 'Cancel' and 'Ask' buttons at the bottom right.

You're no longer limited to attaching image files to your posts. Just insert them in the rich text editor right where you want them. You can add up to ten inline images per post. Inserting inline images in posts can be done only from your desktop, but the images are displayed on both desktop and mobile.

Attach More Files to Your Posts

Now you can attach not one, not five, but ten files to your posts. Hello, double digits! We've also made it easier to attach those files by preventing you from accidentally selecting too many.

When you click that little paperclip to add files to your post, you still choose whether to upload files (1) or select them from the community (2). Do any combination of uploading and selecting. Choose up to ten. You can't go wrong! We'll show you how many you've added so far (3).



While questions and feed posts allow multiple files, answers and comments are still limited to one file each.

Add and Remove Files When Editing Posts

Do you love being able to edit your posts, but wish you could add and remove files when you do? Stop dreaming and start editing! Fix that typo and while you're at it, remove that file you accidentally attached. Replace it with a new one. Add some more.

With the new multiple file limit, you can add up to ten files per post. So if your question has five files attached, for example, now you can edit it to add more.

Set Profile Visibility in Communities

Your users can change their profile page in Communities just like they can in Salesforce Classic. No longer do they (or you) need to go to Salesforce Classic to update their name, title, photo, address, and so on.

Improved Look and Feel for Compact Feed

You'll like Compact Feed even more, with all the improvements we've made. When members ask the community a question, the new Compact Feed emphasizes the question and clearly shows which questions have a best answer. The increased action icon size, repositioned date and time, and added view counts are just cherries on top.

View counts easily gauge how interested people are in a post or how well-placed it is. The count tally increases any time a post is commented on, liked, or the post's detail page is viewed. In the Community Builder, the **Show Views** option in the Feed Compact property editor lets you show or hide view counts for Compact Feed items.

View counts take effect with the adoption of this release, but the count tally begins only after adoption. Compact feeds you created in the Spring '16 release are updated to include view counts.

Share, Revise, and Publish Formatted Code Snippets

Good news for your community developers! Now there's an easy way to share and talk about code in a community feed. Code snippets let developers add code samples with syntax highlighting in the publisher's rich text editor. Your developers can also post code snippets using Chatter REST API and Chatter in Apex. Code snippets are available in communities based on the Napili template.

Enable **Show Code Snippet Button** in the user profile or through a permission set. The button appears with the other rich text options.

Community Templates

We've taken flexibility up a notch for communities using the Napili template. Get creative with the new Tabs component, and move Featured Topics on any page you wish. Create broadcast groups for sending out messages. The Related Articles List component shows members articles that interest them. And with global search, community members can now search all the data they have access to.

 **Note:** For communities using the Winter '16 and later versions of the Napili template, you can add these features to your community immediately after the Summer '16 release. For older versions of Napili, you must [update your template](#) to Summer '16 before you can use the latest enhancements.

IN THIS SECTION:

[Give Community Members What They're Looking for with Improved Search](#)

Supercharge search beyond articles and discussions, and rejoice: Global search is now available in your community. Community members now see search results based on objects they can access (including custom ones!), as long as they're searchable. Other enhancements include improvements when searching for person accounts.

[Do More with Topics](#)

Add the Featured Topics component on any page, translate topic names and descriptions, easily filter articles without topics in Community Management, and more.

[Get Creative with Flexible, Customizable Tabs](#)

The new Tabs component makes it easy to group other components in a set of customizable tabs and add structure to your page. Add as many tabs as you need and whatever components you want, apart from another Tabs component. (You really *can* have too much of a good thing.) Use the Property Editor to rename and reorder the tabs. And choose whether to show or hide individual tabs to guest users in the community.

[Enhanced Navigation for Your Community Members](#)

You can now open external menu links in the same tab, which is a great way to keep navigation within your community and let members find their way around more easily.

[Discover Related Questions \(Beta\) and Articles](#)

When community members view articles, we show related articles to help them find what they're looking for. This feature was too great to limit to articles, so we shared the love with questions (Beta). The Related Article List and Related Question List components appear by default on the Article Detail page and Question Detail page, respectively. You can customize the component titles and the number of items in the lists in Community Builder.

[Exclude Internal Community Members from the Reputation Leaderboard Component](#)

We all know *that* guy, the one who has an answer for everything and doesn't hesitate to tell you and the world about it. If you have a community with a mixed audience of internal and external members, you can now exclude internal members from the Reputation Leaderboard component. In the component's Property Editor, select the `Exclude internal members` option and you're good to go.

[Add a Files List to Community Pages](#)

The new Files List component in Community Builder is here! Now you can let your community members view and manage all their files from one place.

[New Name for the Home Page Tabs Component](#)

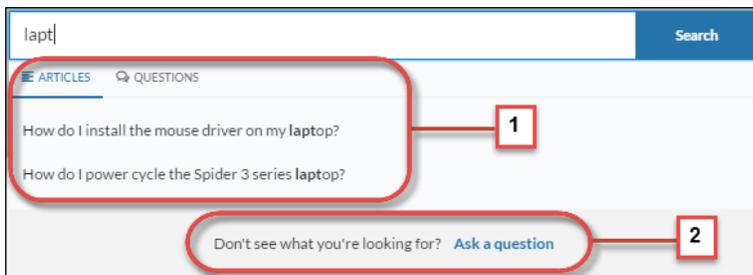
We've renamed the Home Page Tabs component to better reflect its function. The component is now called Featured Topics & Feeds.

Give Community Members What They're Looking for with Improved Search

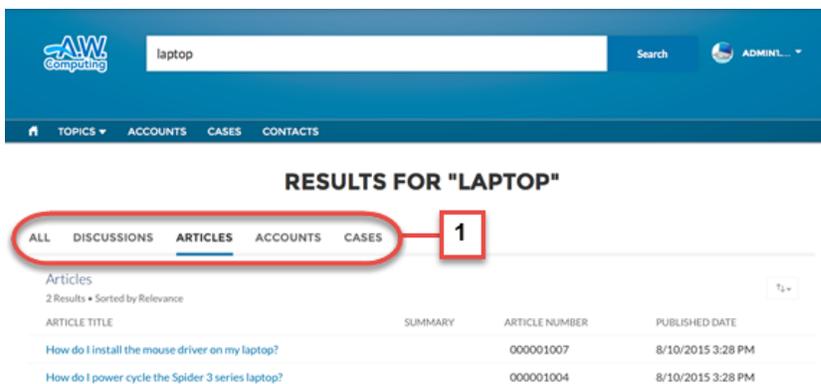
Supercharge search beyond articles and discussions, and rejoice: Global search is now available in your community. Community members now see search results based on objects they can access (including custom ones!), as long as they're searchable. Other enhancements include improvements when searching for person accounts.

We've made quite a few improvements to the Search Publisher component, so you can make the following customizations:

- As members enter search items, the search publisher has the option of showing suggested results in one list, rather than tabbed Articles and Discussions lists. Want to keep the tabbed lists? No worries, you can definitely keep them. (1)
- Want to turn off autocomplete? Not sure why you would, but now you can.
- Want to hide the footer that allows community members to ask a question or contact support? You now have the option of showing the footer or not, based on your community's needs. Previously, the footer was always on by default. (2)
- Before this release, when members were on a Topic Detail page and started entering a search term, the search was only limited to the topic. Now the search is done across the community, and the member has the option of only limiting it to the topic if needed.



 **Example:** Global search results shown in the community.



The Global Search Results component is the newest Lightning component in the Community Builder. With this component, members can see search results in one tab (All), and cases, accounts, contacts, and any other object exposed in the community to which they have access. (1) Community managers can easily determine which tabs, and thus which search results, they want community members to see.

 **Important:** To allow your users to find a custom object's records when they search, in Salesforce setup create a custom tab set to *Default On* or *Default Off*. Creating a custom tab enables the custom object's **Allow Search** setting.

Do More with Topics

Add the Featured Topics component on any page, translate topic names and descriptions, easily filter articles without topics in Community Management, and more.

IN THIS SECTION:[Add More Context to Your Topic Pages](#)

You now have two new arrows in your topics-related components quiver—Topic Description and Articles With This Topic. The Topic Description component gives community members context around the topic. It's populated with the description you enter on the Topic Management page in Community Management.

[Translate Topic Names and Descriptions for Communities with a Global Audience \(Generally Available\)](#)

Use the Translation Workbench to translate topic descriptions and navigational and featured topics in communities with a global audience.

[Easier Content Curation and Improved SEO with Topics](#)

The Topics section in Community Management just got better. Now you can add and edit descriptions to topics in one place, and easily filter your articles to see the ones that don't have topics. Topic descriptions are exposed in search engines, vastly improving your community's SEO.

[Give More Visibility to Your Featured Topics](#)

Showcase your community's featured components on any community page, because they're no longer shackled to the home page. Your featured topics can now be featured anywhere in the community.

[Endorse Members on Topics They Know About on the User Profile Page](#)

We've changed the User Profile Knowledgeable About component name to User Profile Knows About (less of a mouthful, right?), and added the ability to endorse members on new or existing topics right from their user profile pages. It just got way easier to endorse your bestie for cat videos right on her profile.

[Choose from More Topics When Setting Up Featured Topics](#)

Adding Featured Topics in Community Management just got easier! Find the topics you need in the drop-down menu of the Featured Topic page, which now loads up to 1,000 topics.

Add More Context to Your Topic Pages

You now have two new arrows in your topics-related components quiver—Topic Description and Articles With This Topic. The Topic Description component gives community members context around the topic. It's populated with the description you enter on the Topic Management page in Community Management.



Example: A topic detail page with the Topic Description (1) and Articles With This Topic (2) components.

The screenshot shows a community page for 'CAMPING GEAR'. At the top, there is a search bar with the text 'Search for articles and discussions' and a 'Search' button. Below the search bar is a navigation menu with 'TOPICS'. The main content area is titled 'CAMPING GEAR' and includes sub-navigation for 'Tents | Cooking Gear | Water Bottles | Outdoor Showers | Rain Gear'. There are two tabs: 'DISCUSSIONS' and 'ARTICLES'. The 'ARTICLES' tab is active, showing three article cards:

- Backpacking for Beginners**: First-time backpacker? Basic tips can go a long way to ensuring you and your group have a great time. 62 Views • Aug 31, 2014 • FAQ
- Backpacking: Before You Leave Home**: Backpacking requires a fair amount of planning to be successful. Before you leave home, make sure you have the following. 83750 Views • Aug 31, 2014 • FAQ
- How to Choose Climbing Ropes**: You could say that rope or 550 cord is the backbone of a campsite. It goes into everything from tents and shelters to cooking tripods and furniture. One of the best ideas I've seen in a long time is a "rope kit" - an organized collection of pre-cut ropes. Here's how to put one together. 16064 Views • Aug 3, 2015 • FAQ

On the right side, there is a sidebar with two components:

- DESCRIPTION**: Everything you ever wanted to know about gear! Tents, stoves, showers, and all in between. We've got you covered.
- ARTICLES WITH THIS TOPIC**:
 - Backpacking: Before You Leave Home
 - Return Policy for Camping Equipment
 - Backpacking for Beginners

At the bottom of the page, there is a message: 'Don't see what you're looking for?' and two buttons: 'ASK THE COMMUNITY' and 'CONTACT SUPPORT'.

If you don't fill out the topic description in Community Management, the card will simply not appear on the community page.

The Articles With This Topic component directs community members to articles of interest. Out of the box, the Articles With This Topic component is a tab on the Topic Detail page. It is also available as a standalone component for use on other parts of the page (2).

Translate Topic Names and Descriptions for Communities with a Global Audience (Generally Available)

Use the Translation Workbench to translate topic descriptions and navigational and featured topics in communities with a global audience.

Consider the following when using the Translation Workbench.

- There is no Metadata API support for translated topic names or descriptions.
- While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
- Modifying topic names from Community Management only changes the English community. All translated topic name and description changes must be made using the Translation Workbench.
- If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.

- When topic names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.

Easier Content Curation and Improved SEO with Topics

The Topics section in Community Management just got better. Now you can add and edit descriptions to topics in one place, and easily filter your articles to see the ones that don't have topics. Topic descriptions are exposed in search engines, vastly improving your community's SEO.

- Example:** In Community Management on the Topic Management page, easily add or edit descriptions. In Community Builder, use the Topic Description component to show the description on a Topic Detail page.

Topic Management

Click **New** to create topics or **Merge** to combine them. To rename or delete a topic, click the pencil icon.

The options you see depend upon your permissions. To access more features, talk to your administrator.

New **Merge** 🔍 Type topic name and press Enter...

*** Name**
Coffee Beans

Description
Where are your beans grown? Where are they roasted? This topic covers it all.

Save **Cancel** **Delete Topic**

- Example:** In Community Management on the Article Management page, filter out articles without topics so you can add those topics for better content organization in your community. The community manager can now ensure that new articles are assigned to the right topics, and are easily discovered by community members. The default All Articles filter loads all the articles in your org.

Article Management

Use topics to organize articles in your community. Search for articles, or filter by data categories, and assign topics.

🔍 Search articles...

Show **All Articles** ▼

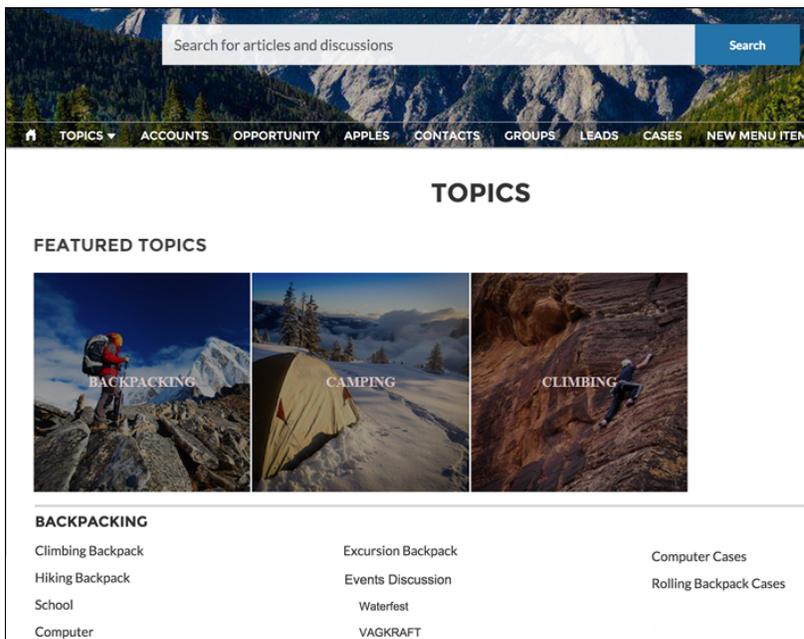
Data C **Articles Without Topics** Child Category **Select** ▼

Give More Visibility to Your Featured Topics

Showcase your community's featured components on any community page, because they're no longer shackled to the home page. Your featured topics can now be featured anywhere in the community.

The new Featured Topics component in the Community Builder gives you the freedom to display your community's designated featured topics, and the images that represent them, on any community page.

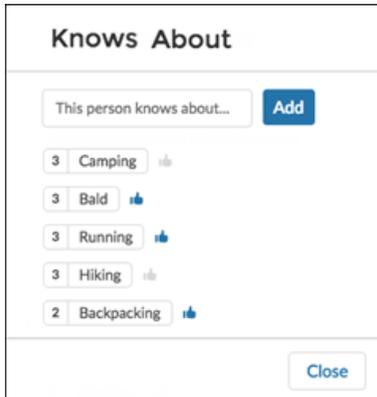
 **Example:** Featured Topics on the Topic Catalog page



Endorse Members on Topics They Know About on the User Profile Page

We've changed the User Profile Knowledgeable About component name to User Profile Knows About (less of a mouthful, right?), and added the ability to endorse members on new or existing topics right from their user profile pages. It just got way easier to endorse your bestie for cat videos right on her profile.

 **Example:** User Profile Knows About component in action in a community. You can now add new topics to endorse community members.



 **Note:** You can add endorsements only on other members' profiles, not on your own. Nice try though.

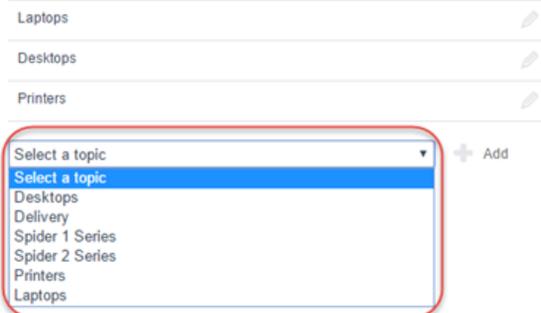
Choose from More Topics When Setting Up Featured Topics

Adding Featured Topics in Community Management just got easier! Find the topics you need in the drop-down menu of the Featured Topic page, which now loads up to 1,000 topics.

 **Example:** The drop-down menu now shows up to 1,000 topics to choose from.

Featured Topics

Featured topics are displayed prominently on your site's home page. You can have a maximum of 25.



Get Creative with Flexible, Customizable Tabs

The new Tabs component makes it easy to group other components in a set of customizable tabs and add structure to your page. Add as many tabs as you need and whatever components you want, apart from another Tabs component. (You really *can* have too much of a good thing.) Use the Property Editor to rename and reorder the tabs. And choose whether to show or hide individual tabs to guest users in the community.

If you're familiar with the [renamed Featured Topics & Feeds component](#) (previously Home Page Tabs), perhaps you've wanted to customize it to suit your unique needs. With the flexible Tabs component, now you can!

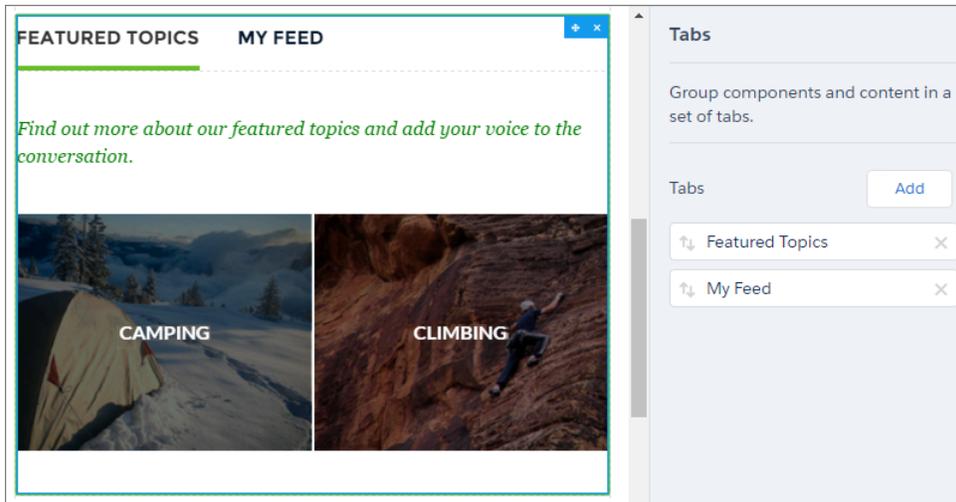
And check out the new [Featured Topics component](#), which is now independent of the Featured Topics & Feeds component. Combined with the Tabs component, it brings a new level of freedom when building your community's pages. Did we mention flexible?

 **Example:** Let's say you want your community members to see a customized Tabs component on the Home page instead of the standard Featured Topics & Feeds component.

First we delete the Featured Topics & Feeds component and drag a Tabs component onto the canvas. Then we add two tabs and name them Featured Topics and My Feed.

We add a Featured Topics and a Rich Text component to the first tab, and a Compact Feeds component to the second tab.

And with that we have a customized Home page for our community members!



Enhanced Navigation for Your Community Members

You can now open external menu links in the same tab, which is a great way to keep navigation within your community and let members find their way around more easily.

When editing the navigation menu, select **Open link in the same tab** for external URLs.

Discover Related Questions (Beta) and Articles

When community members view articles, we show related articles to help them find what they're looking for. This feature was too great to limit to articles, so we shared the love with questions (Beta). The Related Article List and Related Question List components appear by default on the Article Detail page and Question Detail page, respectively. You can customize the component titles and the number of items in the lists in Community Builder.

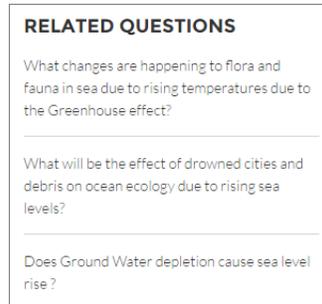
Note: This release contains a beta version of related questions, which means it's a high-quality feature with known limitations. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for related questions in the [Community Implementation](#) group in the Success Community.

Related questions are available within 24 hours after the release. To see related questions, your community must have a best answer for at least one question.

You can also discover related questions using [Chatter REST API](#) and [Chatter in Apex](#).

Example: Sample Related Articles List (Property Editor and component)

Sample Related Questions List (Property Editor and component)



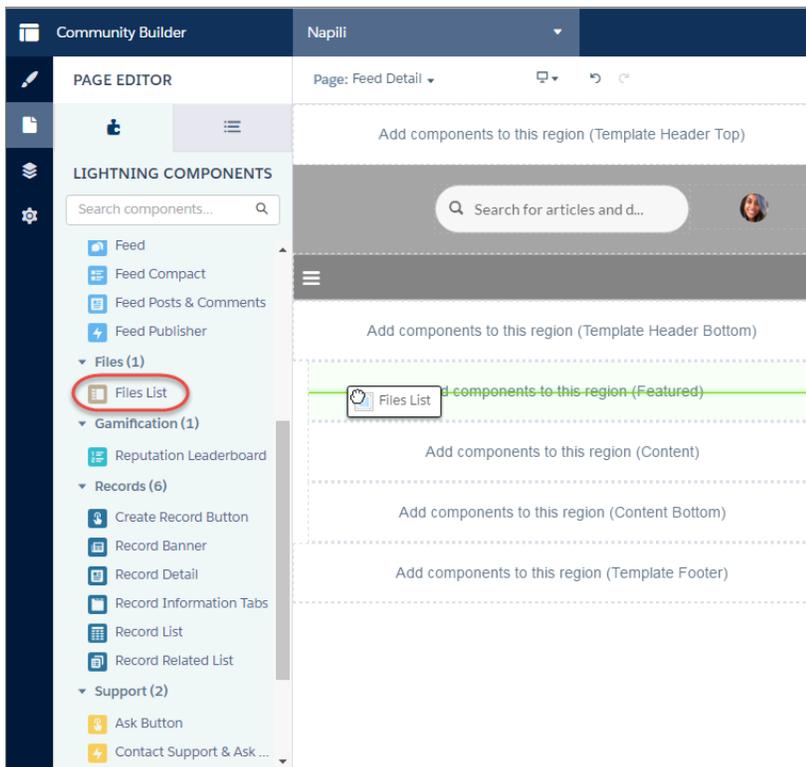
Exclude Internal Community Members from the Reputation Leaderboard Component

We all know *that* guy, the one who has an answer for everything and doesn't hesitate to tell you and the world about it. If you have a community with a mixed audience of internal and external members, you can now exclude internal members from the Reputation Leaderboard component. In the component's Property Editor, select the `Exclude internal members` option and you're good to go.

Add a Files List to Community Pages

The new Files List component in Community Builder is here! Now you can let your community members view and manage all their files from one place.

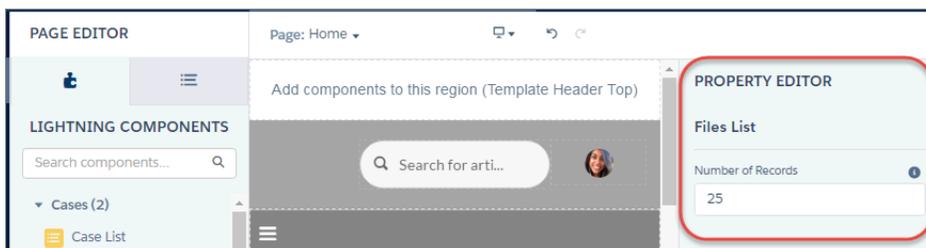
In Community Builder, drag the new Files List component onto a page. This gives your community members a one-stop view of all their files, while letting them do useful things like uploading and previewing.



The left panel has helpful filters for navigating files they own, files that have been shared with them, and more. From the previewer, members can take even more file actions.

Owned by Me	TITLE	OWNER	LAST MODIFIED DATE
Shared with Me	PartsWarrantyInfo	Anita Kedhar	4/18/2016 7:04 PM
Recent	wall-color-swatches	Anita Kedhar	4/18/2016 7:04 PM
Following	OwnersManual	Anita Kedhar	4/18/2016 7:04 PM
	refrigerator-door-handle	Anita Kedhar	4/18/2016 7:04 PM
	missing screws	Anita Kedhar	4/18/2016 7:03 PM
	floor plan	Anita Kedhar	4/18/2016 7:03 PM
	coffee grinder	Anita Kedhar	4/18/2016 7:03 PM
	blender blade	Anita Kedhar	4/18/2016 7:03 PM

Use the Property Editor to customize the Files List display. Choose the number of records to display on the page at once. Try out different settings to get the look you want.



New Name for the Home Page Tabs Component

We've renamed the Home Page Tabs component to better reflect its function. The component is now called Featured Topics & Feeds.

Community Builder

Make your community's pages work harder for you. Create one version of a page for your customers and another for your partners, and control who sees each page based on their profile. Yes, you read that right! We've also enhanced Page Management by adding page duplication and search.

IN THIS SECTION:

[Control Who Sees What with Profile-Based Page Visibility](#)

Create page variations that target specific audiences in your Napili community, and control who sees what depending on their profile. You've been able to create alternative versions of a page for several releases, but you could make only one the *active* or visible page. Now, with profile-based page visibility, you can make as many page variations visible as you like!

[Manage Pages More Easily with the Streamlined Page Manager](#)

Page management in Community Builder just got a face lift! Control page visibility, duplicate pages, and quickly find the page you need.

[Leverage Lightning Design Tokens to Brand Custom Components](#)

Psst! In case you haven't heard, Lightning design tokens are [generally available for Lightning components](#). Now developers can use a subset of the standard design tokens to make custom Lightning components compatible with the Branding Editor in Community Builder.

[Community Builder Settings Have a New Home](#)

We've reconfigured the Settings area. Now you can find the **Hide the header region and navigation** and **Show loading indicator as the page loads** settings in the new Theme section instead of the General section.

Control Who Sees What with Profile-Based Page Visibility

Create page variations that target specific audiences in your Napili community, and control who sees what depending on their profile. You've been able to create alternative versions of a page for several releases, but you could make only one the *active* or visible page. Now, with profile-based page visibility, you can make as many page variations visible as you like!

 **Note:** For communities using the Winter '16 and later versions of the Napili template, this functionality is available immediately after the Summer '16 release.

Let's say you have a financial services community and you want your clients and your brokers to see a different Home page based on their profile. You can create two variations of the Home page, each with content targeting a specific audience—clients and brokers in this case—and set the visibility of each page to different profiles. All members go to the same URL, but clients see Home A, whereas brokers see Home B.

Who Exactly Sees What?

All this magic happens in the Page Manager area, where we've added a Page Variations tab for each page. Choose from three visibility options that, when combined with a page's published status, determine whether a page is visible to community members.

Default: All users unless set by profile

When the page is published, it's visible to all valid community members, except members whose profiles are assigned to a different page variation. One default variation is required.

By Profile

When the page is published, it's visible only to users with the selected profiles.

None

Even if the page is published, it's not visible to users.

 **Example:** Here are several Home page variations with differing visibility and published statuses.

- Home A is visible only to Profile A members.
- Home B is visible only to Profile B members, but they can't see pending changes.
- Home C isn't visible.
- Home D is visible to all members, except Profile A or Profile B members.
- Home E isn't visible.

PAGE MANAGER +

Quick Find

NAPILI PAGES

- Article Detail
- Contact Support
- Create Record
- Error
- Feed Detail
- Home **Home**
- Question Detail
- Search
- Topic Catalog
- Topic Detail
- User Settings

Home

Edit Preview Delete

PROPERTIES **PAGE VARIATIONS**

Page Variations let you quickly create alternative versions of a page. Try out different page layouts and styles, or create variations that are aimed at distinct audiences.

You can start with a blank page variation or duplicate an existing one to jump-start the process.

New Page Variation

NAME	VISIBILITY ⓘ	STATUS	ACTIONS
Home A	By Profile: Profile A	Published	⌵
Home B	By Profile: Profile B	Published (changes pending)	⌵
Home C	By Profile: Profile C	Unpublished	⌵
Home D	Default: All users unless set by profile	Published	⌵
Home E	None	Published	⌵

Note: A page variation that was previously set as the active page is now set to default visibility. The visibility of all other page variations is set to None.

If the page was previously published, that status is applied to all its page variations. However, a published page variation with visibility set to None is never visible to your community members.

We've made quite a few changes to the Page Manager area to accommodate profile-based page visibility. But there's more to see, so ramble over to the [enhanced Page Manager](#) to learn more.

Manage Pages More Easily with the Streamlined Page Manager

Page management in Community Builder just got a face lift! Control page visibility, duplicate pages, and quickly find the page you need.

Note: For communities using the Winter '16 and later versions of the Koa, Kokuia, and Napili templates or the Spring '16 version of the Aloha template, this functionality is available immediately after the Summer '16 release.

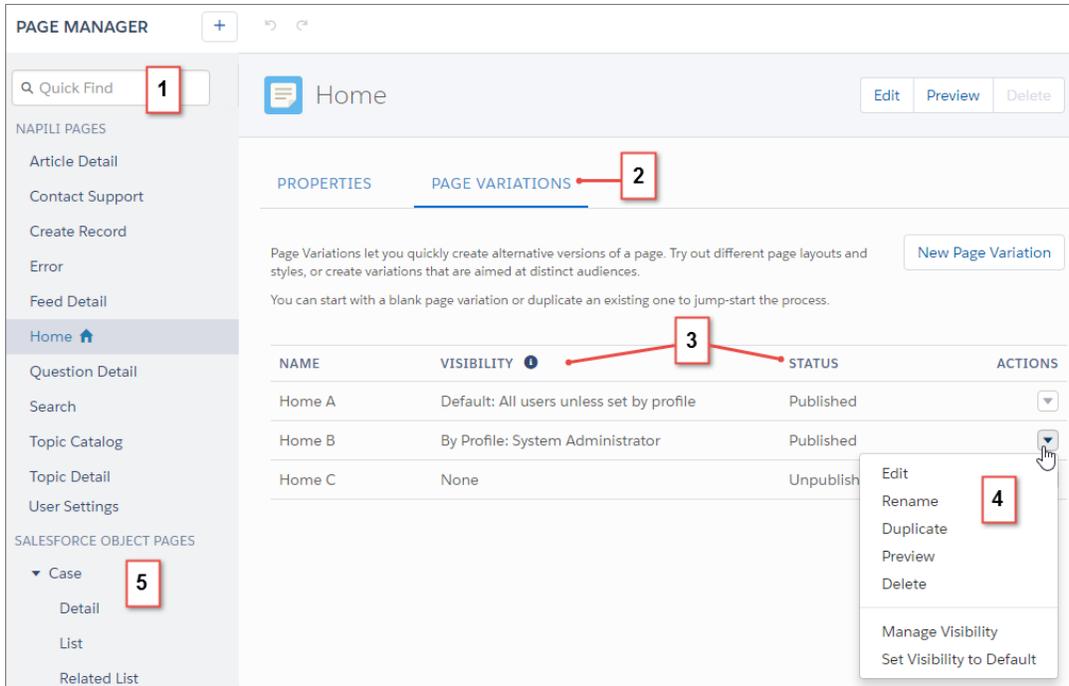
You've read about [profile-based page visibility](#), right? (If not, get on it!) So you know we've made some significant changes to the Page Manager area as a result.

As part of these enhancements, we've made Page Manager more intuitive and consistent by:

- Adding quick find (1)
- Moving the option to create and manage page variations to a separate Page Variations tab (2)

Note: All pages can now have page variations, including the Home and Error pages. If you previously created custom Home or Error pages, they appear in that page's Page Variations tab.

- Removing the Active Page property because now you can make *any* page variation visible in Napili
- Including Visibility and Status columns (3) so that you can tell at a glance which variations are live
- Adding the ability to duplicate page variations—no more starting from scratch! (4)
- Providing options to manage page visibility in Napili (4)
- Relocating the pages associated with an object to the page menu (5)

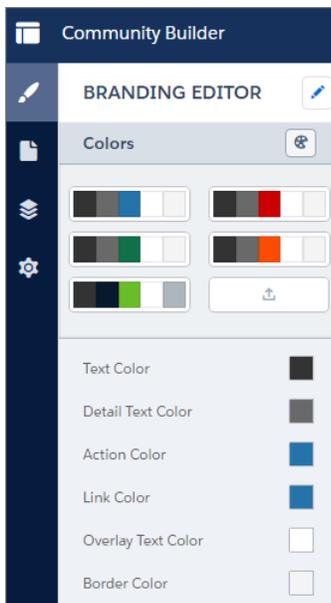


Leverage Lightning Design Tokens to Brand Custom Components

Psst! In case you haven't heard, Lightning design tokens are [generally available for Lightning components](#). Now developers can use a subset of the standard design tokens to make custom Lightning components compatible with the Branding Editor in Community Builder.

Each property in the Branding Editor maps to one or more standard design tokens. When you update a property in the Branding Editor, the system automatically updates any Lightning components that use the tokens associated with that branding property.

With just a couple of clicks in the Branding Editor, you can rebrand your entire community—custom Lightning components and all!



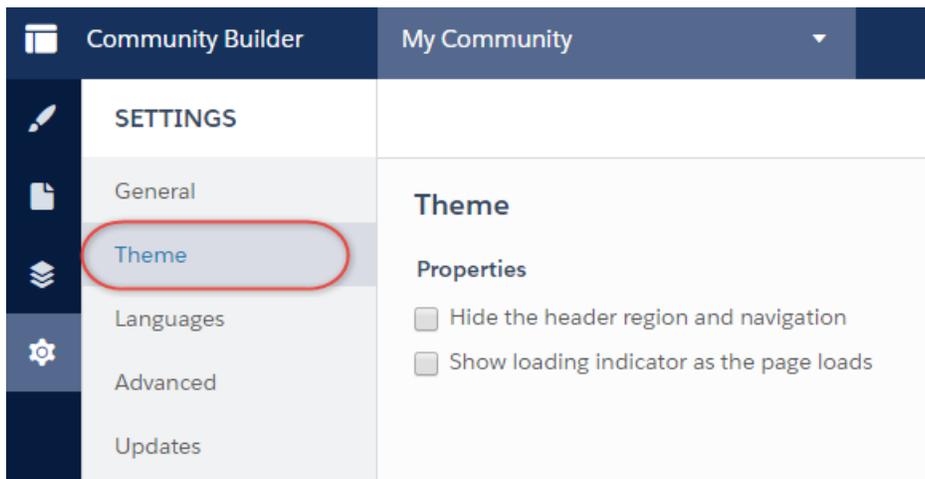
SEE ALSO:

[Lightning Components Developer Guide: Standard Design Tokens for Communities](#)

Community Builder Settings Have a New Home

We've reconfigured the Settings area. Now you can find the **Hide the header region and navigation** and **Show loading indicator as the page loads** settings in the new Theme section instead of the General section.

 **Note:** For communities using the Winter '16 and later versions of the Koa, Kokua, and Napili templates or the Spring '16 version of the Aloha template, this functionality is available immediately after the Summer '16 release.



Community Management

Community managers love helping members make connections to get the most out of the community. But community managers hate policing the community for trolls and spammers. So we've added tools to make their job more about what they love and less about what they hate. Set up moderation rules to review and approve member-generated content. Establish rate limiting rules to monitor and limit how frequently content is created. You can even target specific users. Actionable Insights make it easier to manage spam attacks. Hey Mr. Spammer, your days are numbered.

IN THIS SECTION:

[Pre-Moderation—Review Posts from Your Community Members \(Beta\)](#)

Your community managers and moderators are armed with another level of defense against spammers and malicious members. Set up your moderation rules to review and approve posts made by community members. Posts that are pending review aren't displayed in the community feed; only the author and your moderators can see the posts. Rules to review content help you make sure that non-compliant or inappropriate content isn't immediately visible to everyone in your community.

[Protect Your Community from Spammers with Rate Limiting Rules](#)

Rate rules monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

[Target Specific Members in Your Moderation Rules with Member Criteria](#)

Member criteria targets specific groups of community members based on their user profile, user type, user creation date, or whether they've successfully posted or commented in the community before. You can use member criteria in content rules and rate rules. Use member criteria in your rules to pinpoint use cases, such as reviewing posts only from customers created in the past 7 days.

[Manage Problem Members with Freeze](#)

Community moderators can freeze troublesome community members. Freezing members prevents them from logging in to any community or even Salesforce itself, thwarting their nefarious plans.

[Find Everything About Community Moderation in One Place](#)

We've made life easier for your community managers by putting the moderation setup and managing tasks in one place. We moved the moderation Insights reports from the Insights section to the Moderation section in Community Management.

[Moderate Private Messages in Your Community](#)

When your members flag an inappropriate message, your moderators can use Community Management to review the message—they can even see its contents! Moderators can then use an Insights report to remove the flag or delete the message.

Pre-Moderation—Review Posts from Your Community Members (Beta)

Your community managers and moderators are armed with another level of defense against spammers and malicious members. Set up your moderation rules to review and approve posts made by community members. Posts that are pending review aren't displayed in the community feed; only the author and your moderators can see the posts. Rules to review content help you make sure that non-compliant or inappropriate content isn't immediately visible to everyone in your community.

This feature is enabled by default for all Salesforce orgs with Communities enabled.



Note: This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

How do I set up moderation rules to review posts?

Keep in mind that you can only set up moderation rules to review and approve posts in groups and user profiles. You can't review and approve comments.

In communities that use the Napili template, moderation rules to review and approve apply to posts in groups and user profiles, including questions and answers.

You can create and manage rules to review content in Community Management under **Moderation > Rules**. Create a content rule and use Review as the moderation action. You can also set up rules to review and approve posts using the Metadata API or Tooling API.



Tip: Set up [member criteria](#) for even more specialized protection against spammers or new members! Member criteria targets specific groups of members based on their user profile, user type, user creation date, or whether they've successfully posted or commented in the community before. For example, you can set up your rule to review posts only from your customer users who were created in the past seven days. Or a rule to review every member's first post.

Which permissions do my moderators need?

To allow your community moderators and managers to review and approve posts, assign them the following user permissions.

Task	User Permissions Needed
Approve, edit, and delete posts that are pending review from the community feed:	"Can Approve Feed Post"
Approve, edit, and delete posts that are pending review from Community Management:	"Can Approve Feed Post" AND "Manage Communities" OR "Create and Set Up Communities" AND Is a member of the community whose Community Management page they're trying to access Download the Salesforce Communities Management package from the AppExchange, available shortly after the Summer '16 release, to get predefined Insights reports that can help you manage reviewing posts.

What's the end-to-end flow?

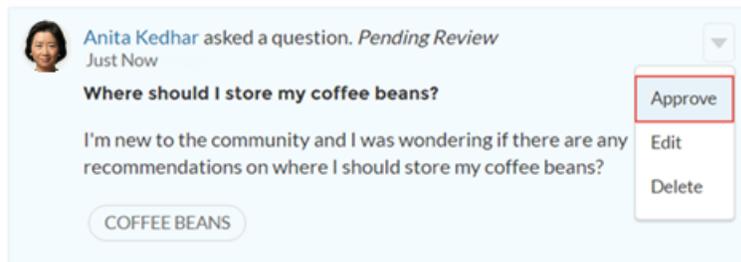
Set up your moderation rule to review member-generated content.

When a community member creates a post that meets the conditions of your rule, they see **Pending Review** in the header of the post. The background of the post is highlighted in a light-blue color.



While the post is in review, it's visible only to the author of the post and users with the "Can Approve Feed Post" permission. Other members of the community can't see posts that are awaiting review and approval. The post author can edit or delete the post while it's pending review but can't comment on it.

In the community feed, users with the "Can Approve Feed Post" permission see the Approve action in the drop-down menu. If the post is inappropriate, they can delete it. If the post has a typo, they can even edit it.



 **Tip:** Your community managers can use the new [Pending Insights report](#) to approve multiple posts from Community Management.

After a community manager or moderator approves the post, the author of the post receives an email. This email informs the author the post is approved and provides a link to the post in the community. Email notifications, such as @mentions notifications, are only sent after the post is approved.

You can also approve posts using [Chatter REST API](#) and [Chatter in Apex](#).

Are there limitations?

- You can only set up moderation rules to review and approve posts in groups and user profiles. You can't review comments, files, or private messages.
- Only communities using the Napili template see Pending Review in the header of the post. In communities that use a Salesforce Tabs + Visualforce template, posts in Pending Review status are displayed the same as regular posts (Pending Review isn't displayed), and users with the "Can Approve Feed Post" permission don't see the Approve action.

 **Important:** Members in a community with a Salesforce Tabs + Visualforce template can't see that their post is awaiting approval. However, they do receive an email when the post is approved.

- The Feed Compact component doesn't display Pending Review in the header of a post that is pending approval.
- You can't review or approve posts in private and unlisted groups, unless you are a member of the group.
- After a post is approved, it can't be sent for review again.
- After a post is sent to review, the author can't comment on that post. Like and share options aren't displayed in the UI. However they're still available via the API.
- A community member can edit the post while it's pending review or after it's approved. To prevent the author from editing the post, you can disable feed post editing for certain users.
- If a member attaches a file to a post sent for approval, the file is published. Even though the post isn't visible in the general community feed, the file is visible. The file appears in the list of Group Files and in related lists.

 **Example:** Here are some of the ways you can use rules to review member-generated content.

Self-Service Community

Does your community allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your community? Use member criteria that includes only your guest user profile and filters for members that have never contributed to the community.

Partner Community

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts that include keywords such as "acquisition" or "merger."

Employee Community

Does your community require HIPAA compliance? Set up your rules to review posts from all your employees.

SEE ALSO:

[Salesforce Help: Create Content Rules to Moderate Your Community \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Review and Approve Posts in Your Community \(Beta\) \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Feed Post and Comments Editing Overview](#)

Protect Your Community from Spammers with Rate Limiting Rules

Rate rules monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

What's a rate rule?

The easiest way to explain is to fill in the blanks:

When a member creates content ___ times in ___ minutes, I want to notify community moderators.

When a member creates content ___ times in ___ minutes, I want to freeze the member.

A rate limit determines how much content a member can create in your community in a specific time frame. Each rate rule specifies which types of member-generated content the rule applies to (such as posts and comments), the time frame (either 3 minutes or 15 minutes), and the amount of content that triggers the action.

There are two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to posts, comments, files, and private messages.



Tip: Set up [member criteria](#) for even more specialized protection against spammers! Member criteria targets specific groups of members based on their user profile, user type, user creation date, or whether they've successfully posted or commented in the community before.

Moderators receive an email for both actions because they need to know when the rate limit is reached and when a member is frozen. Emails are sent to users with the "Moderate Community Users" permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.

How do I set up rate rules?

Before creating your rate rule, keep these things in mind.

- Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules just don't apply to them.
- When members are frozen, they're frozen in *all* communities they're a member of.
- Make sure that you set up appropriate member criteria to use in your rate rule. For example, let's say you have a rate rule that uses member criteria to filter for members without community contributions. After a member's first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

You can create and manage rate rules in Community Management under **Moderation > Rules**.

Edit Rate Rule

Details ! = Required Information

Name

Unique Name

Description

Activate Rule

Rule Conditions

? Rate limiting rules don't apply to internal users.

Select the types of member-generated content and member criteria to use in this rule.

Applies To Post Comment Private messages Files

Member Criteria

Available Criteria		Selected Criteria
<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Customer Users Customer Users - Without Con Partner Users </div>	Add ▶ Remove ◀	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Chatter Free Users </div>

Rate Limits

Set up this rate rule to freeze a member or notify moderators when members create content too frequently within a specific time frame. If you select multiple types of member-generated content, like posts and private messages, the number you specify below is the combined total of content a member creates.

Content Creation Time Frame

Notify Moderators Moderators are notified when a member creates content 6 times in 3 minutes.

Freeze Members Members are frozen when they create content 10 times in 3 minutes.

Example: Let's use the following rate rule as an example.

Applies To: Posts and private messages

Member Criteria: Customer users created in the past 7 days

Content Creation Time Frame: 3 minutes

Notify Moderators: 6

Freeze Members: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✓	✗
6 posts	✓	✗
6 comments	✗	✗
8 posts and 2 private messages	✓	✓
10 posts	✓	✓
10 comments	✗	✗

A rate rule like this protects the community from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they help you reach out to members in need.

Here's a rule set up just for private messages.

Applies To: Private messages

Member Criteria: Customer users created in the past 3 days

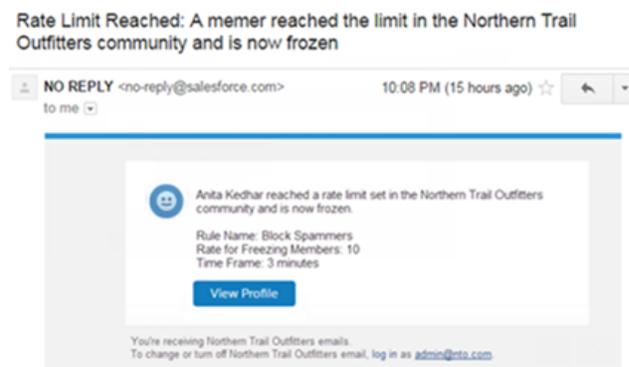
Content Creation Time Frame: 15 minutes

Notify Moderators: 1

Freeze Members: 3

This rate rule protects the community from spammers that attack via private messages. In the past, private message attacks were hard to detect and triage because they weren't visible in the community. Worry no more: Rate rules solve this problem.

If your rate rule is reached, your moderators receive an email.



A moderator can unfreeze members from their profile or through Community Management.

 **Tip:** Install the Salesforce Communities Management package from the AppExchange to get the new [Frozen Members Insights report](#).

SEE ALSO:

[Salesforce Help: Create Rate Limit Rules to Moderate Your Community \(can be outdated or unavailable during release preview\)](#)

Target Specific Members in Your Moderation Rules with Member Criteria

Member criteria targets specific groups of community members based on their user profile, user type, user creation date, or whether they've successfully posted or commented in the community before. You can use member criteria in content rules and rate rules. Use member criteria in your rules to pinpoint use cases, such as reviewing posts only from customers created in the past 7 days.

Before creating your member criteria, think about what you want to do.

- Do you want to protect your community from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that targets users without community contributions.
- Do you want to moderate your internal users' activity in your community? Set up member criteria to include only your internal users.

- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have community contributions.

You can create and manage member criteria in Community Management under **Moderation > Member Criteria**.

Edit Member Criteria

Details ! = Required Information

Name

Unique Name

Description

Include Members Based On

Select any combination of user types and user profiles. Members are included when they belong to any of your selections in this section.

User Types Internal Customer Partner

OR

User Profiles Search: for:

Available Profiles		Selected Profiles
<ul style="list-style-type: none"> Chatter Free User Chatter Moderator User Contract Manager High Volume Customer Portal User Marketing User Partner Community Login User Partner Community User Read Only Solution Manager Standard User System Administrator 	Add <input type="button" value="➤"/> <input type="button" value="➤"/> Remove <input type="button" value="➤"/>	<ul style="list-style-type: none"> Customer Community Plus Login User Customer Community Plus User Customer Community User

Filter Members Based On

Filter your members by their creation date or whether they've posted or commented in the community. If you selected user types or user profiles, members must also meet the conditions you select in this section.

Filter By None User creation date Members without community contributions

Days since user was created

 **Example:** Let's look at the following conditions.

User Types: Partner

User Profiles: Customer Community Plus Login User, Customer Community Plus User, Customer Community User

Filter By: User creation date is set to 7 days since the user was created

This member criteria applies to:

- Partner users created in the past 7 days
- Customer Community Plus Login User created in the past 7 days
- Customer Community Plus User created in the past 7 days
- Customer Community User created in the past 7 days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

When you select user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters.

SEE ALSO:

[Salesforce Help: Create Member Criteria to Moderate Your Community \(can be outdated or unavailable during release preview\)](#)

Manage Problem Members with Freeze

Community moderators can freeze troublesome community members. Freezing members prevents them from logging in to any community or even Salesforce itself, thwarting their nefarious plans.

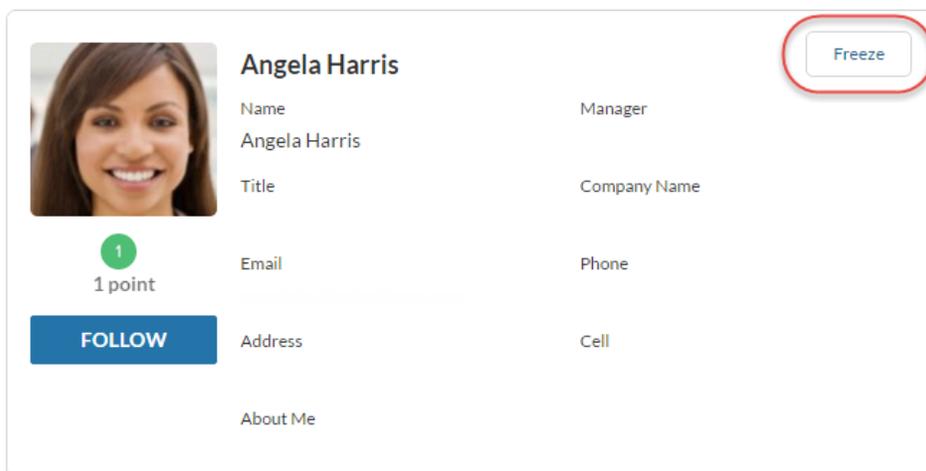
Who can freeze members depends on a couple things. Users with the "Moderate Community Users" or "Manage Users" permission can freeze external members on their user profile page or in Community Management. Users with the "Manage Users" permission can freeze internal users in Community Management.

To freeze a member from their profile page, a moderator simply clicks the **Freeze** button. Although a frozen member's profile is still visible, that person can't log in, let alone post. To unfreeze a member, go back to their profile and click the **Unfreeze** button.

 **Note:** In Napili Aura templates, the freeze action is only available in versions 35 and higher. The freeze button appears on external users profiles.

To freeze a member in Community Management, use the [new Members Insights report](#).

 **Example:** The **Freeze** button on a member's profile page.



Find Everything About Community Moderation in One Place

We've made life easier for your community managers by putting the moderation setup and managing tasks in one place. We moved the moderation Insights reports from the Insights section to the Moderation section in Community Management.

We also removed the Flagged Files and Flagged Posts pages from the Moderation section. These pages displayed a list of flagged files and posts to users with special permissions. Instead, you use the moderation Insights reports to manage flagged files and posts. Insights reports are more powerful than the old pages, and your community managers will love the increase in their efficiency.

So when you want to *protect* and *moderate* your community, head over to the Moderation section in Community Management to accomplish the following tasks.

- Set up moderation criteria like keyword lists and member criteria
- Set up moderation rules to block, flag, replace, and review member-generated content
- Monitor flagged member-generated content
- Review and approve pending posts from members
- Unfreeze members
- Review all moderation events that occurred in the community

 **Tip:** You can get preconfigured Insights reports in the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release. This package provides preconfigured Insights that map to the Flagged, Pending, Members, and Audit Trail pages in the Moderation section. You see these pages only after you install the package.

We made the following changes to navigation.

Updated Navigation	Description
 Moderation	
Flagged	New Insights reports replace the Flagged Posts and Flagged Files pages. Use this page to see flags on posts, comments, files, and private messages.
Pending	New Insights report. Use this page to review and approve posts.
Members	New Insights report. Use this page to manage your frozen members.
Audit Trail	New Insights report. Use this page to see all moderation activity in the community.
Content Criteria	Updated. Called Criteria last release. Use this page to set up keyword lists to use in moderation rules.
Member Criteria	New setup page to create member criteria to use in moderation rules.
Rules	No changes. Use this page to set up content rules and rate rules.

To get the new Insights reports, install the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release.

 **Note:** If you previously installed the Salesforce Communities Management package, your mapped Insights reports appear in the updated locations. However, you must manually remove the Moderation label and the associated folder mapping on the **Engagement > Settings** page.

Moderate Private Messages in Your Community

When your members flag an inappropriate message, your moderators can use Community Management to review the message—they can even see its contents! Moderators can then use an Insights report to remove the flag or delete the message.

To view flagged private messages, moderators and managers need the “Moderate Communities Chatter Messages” permission. Moderators see the contents of private messages only in communities they’re a member of.

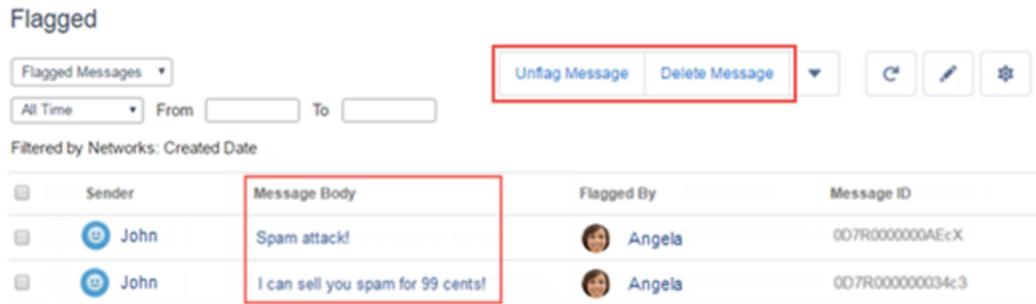
Previously, to moderate flagged private messages, you had to use the API and assign your users the “Manage Chatter Messages” permission. This permission gave users access to *all* private messages in your internal Salesforce org. Yikes! So if you previously assigned your moderators the “Manage Chatter Messages” permission, replace it with the “Moderate Communities Chatter Messages” permission.

 **Tip:** Want a preconfigured Insights report to moderate your private messages? Install the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release.

When you combine the “Moderate Communities Chatter Messages” permission with actionable Insights and a predefined Insights report, you might feel compelled to send us fan mail. (Please do.)

The package provides a predefined Flagged Messages Insights report that you can use in Community Management to:

- View the contents of flagged private messages in communities you’re a member of
- Unflag messages
- Delete messages



Flagged

Flagged Messages ▾

All Time ▾ From To

Filtered by Networks: Created Date

Sender	Message Body	Flagged By	Message ID
 John	Spam attack!	 Angela	007R00000000AEcX
 John	I can sell you spam for 99 cents!	 Angela	007R0000000034c3

Community Insights

Insights are now actionable! Community managers can act on their community activity directly from the report page. We also renamed the Insights section and reorganized some reports. To top it off, the updated Salesforce Communities Management package includes new Insights for reporting on posts pending review and frozen members.

IN THIS SECTION:

[Actionable Insights—Your Community Manager’s Dreams Come True](#)

First, we brought you Insights reports. They helped your community managers monitor recent activity and locate the source of activity to take further action. Now we’ve finished what we started. Three cheers for truly actionable Insights! Insights now let you take action on your community activity directly from the report. Why is this improvement so awesome? Because instant gratification feels good.

[Community Management Insights Section Is Now Called Engagement](#)

We want to make it easier for your community managers to do their job, so we rearranged some Insights reports to align with their task-based goals.

[Manage Pending Posts, Flagged Items, and Frozen Members with Preconfigured Insights](#)

The Salesforce Communities Management package available on the AppExchange provides even more Insights reports around moderation. You get reports to manage posts that are pending approval, review posts that have been flagged, and manage frozen members. You even get an audit trail report to track all your moderation activity.

[See the Contents of Posts, Comments, and Private Messages Directly in Insights Reports](#)

We want to save you time. So we now display the contents of posts, comments, and private messages directly in Insights reports. Seeing the contents of these flagged items means you can quickly identify whether the content is inappropriate and act immediately.

Actionable Insights—Your Community Manager’s Dreams Come True

First, we brought you Insights reports. They helped your community managers monitor recent activity and locate the source of activity to take further action. Now we’ve finished what we started. Three cheers for truly actionable Insights! Insights now let you take action on your community activity directly from the report. Why is this improvement so awesome? Because instant gratification feels good.

Want to delete that spammer’s nasty post? Select the offending post, click **Delete Post**, and you’re done. But wait... you say that spammer left 20 nasty posts? Select them all and click **Delete Post**! You can select up to 100 rows at a time.

Pending

Posts Pending Approval

Last 30 Days From 3/1/2016 To 3/30/2016

Filtered by Networks: Created Date

Approve Post Delete Post

<input type="checkbox"/>	Member	Body	Created On +
<input checked="" type="checkbox"/>	John	I love spam!	3/22/2016
<input checked="" type="checkbox"/>	John	Knock knock. Who's there? Spam!	3/22/2016
<input checked="" type="checkbox"/>	John	Spam attack!	3/22/2016
<input checked="" type="checkbox"/>	John	Have you heard about Spam?	3/22/2016
<input checked="" type="checkbox"/>	John	What's a sandwich made of spam called? Spamwich!	3/22/2016

We’ve created the following standard actions that you can use with your Insights reports:

- Approve Post
- Flag Post, Flag Comment, and Flag File
- Unflag Post, Unflag Comment, Unflag File, and Unflag Private Message
- Delete Post, Delete Comment, Delete File, and Delete Private Message
- Freeze Member and Unfreeze Member

These actions are available in all orgs with Communities—you don’t have to install a package to get them. All you need is a report to use them with. But don’t worry, we’ve got you covered there, too!

Tip: Install the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release. This package provides preconfigured Insights reports that work with our preset actions.

If you previously installed the Salesforce Communities Management package, you see actions for the report.

Each Insights report has different actions. From the Insights report, click to edit the actions assigned to the report. You can edit these actions at any time, but keep in mind that an Insights report must have at least one action.

Edit Insights Actions

Select the actions you want to use with your Insights report. Keep in mind that each Insights report can have different actions.

The screenshot shows the 'Edit Insights Actions' interface. It consists of two main columns: 'Available Actions' on the left and 'Selected Actions' on the right. The 'Available Actions' list includes 'Flag Post' and 'Unflag Post'. The 'Selected Actions' list includes 'Approve Post', 'Delete Post', 'Freeze Member', and 'Unfreeze Member'. Between the columns are 'Add' and 'Remove' buttons. To the right of the 'Selected Actions' list are 'Up' and 'Down' buttons. At the bottom of the interface are 'Save' and 'Cancel' buttons.

Actions that appear on the Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the Freeze Member and Unfreeze Member actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to the Edit Insights Actions page, we let you know which actions are no longer appropriate. Actions that appear on the Edit Insights Actions page are all the available and appropriate actions for your report. This same logic is used to display custom actions.

So how do we make this magic happen? Visualforce pages drive Insights actions. Let's look at the Freeze Member action as an example. This action appears when the report returns data about a user. Behind the scenes, a Visualforce page for this action links to the user object using a standard controller. When your report returns data about a user, all Visualforce pages related to the user object display in the list of available Insights actions.

To create your own custom action, use a Visualforce page. For example, you can create a custom action to delete all activity for a member. If a spammer attacks your community, use this custom action to remove all the spammer's posts and comments with one click! Talk about power!

SEE ALSO:

[Salesforce Help: Create Custom Actions for Community Management Insights \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Visualforce Pages as Global Custom Actions](#)

[Visualforce Developer Guide: Standard Controllers](#)

[Visualforce Developer Guide: Standard List Controllers](#)

Community Management Insights Section Is Now Called Engagement

We want to make it easier for your community managers to do their job, so we rearranged some Insights reports to align with their task-based goals.

So when you want to *engage* and *encourage* growth in your community, head over to the Engagement section in Community Management to accomplish the following tasks:

- Welcome new members
- Help members find the right content and get their questions answered
- Connect members with other members and groups
- Identify curation needs, such as merging topics
- Identify, grow, and retain MVPs in the community

 **Tip:** You can get preconfigured Insights reports in the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release. This package provides preconfigured Insights that map to the pages in the Engagement section.

The Insights reports related to moderation are now in the Moderation section. These reports didn't align with engaging a community, so we moved them. When your community managers want to protect and moderate the community, they can find what they need in the [Moderation](#) section in Community Management.

We made the following changes to navigation.

Updated Navigation	Description
 Engagement	
Adoption	No changes.
Activity	Updated. Called Engagement in the last release.
Groups	Minor update. Called Group in the last release.
Topics	No changes.
Files	Updated. Called Content in the last release.
Self-Service	No changes.
Custom	Updated. Called Moderation in the last release. We moved the Insights report related to moderation to the Moderation section. You can use this page for anything you want now.
Custom 1	No changes.
Custom 2	No changes.
Custom 3	No changes.

 **Note:** If you previously installed the Salesforce Communities Management package, your mapped Insights reports appear in the updated locations. However, we can't update the Insights page labels to match our changes. We recommend that you update your Insights page labels in the Engagement section to match the changes noted in the table.

Manage Pending Posts, Flagged Items, and Frozen Members with Preconfigured Insights

The Salesforce Communities Management package available on the AppExchange provides even more Insights reports around moderation. You get reports to manage posts that are pending approval, review posts that have been flagged, and manage frozen members. You even get an audit trail report to track all your moderation activity.

 **Tip:** The Summer '16 version of the Salesforce Communities Management package will be available on the AppExchange shortly after the release.

If your community takes advantage of moderation rules to review posts, use the Pending Insights report to review and approve posts directly from the report page.

Pending

Posts Pending Approval ▾

Last 30 Days ▾ From 3/1/2016 To 3/30/2016

Filtered by Networks: Created Date

<input type="checkbox"/>	Member	Body	Created On +
<input type="checkbox"/>	John	I love spam!	3/22/2016
<input type="checkbox"/>	John	Knock knock. Who's there? Spam!	3/22/2016
<input type="checkbox"/>	John	Spam attack!	3/22/2016
<input type="checkbox"/>	John	Have you heard about Spam?	3/22/2016
<input type="checkbox"/>	John	What's a sandwich made of spam called? Spamwich!	3/22/2016

If your community takes advantage of rate-limiting rules that freeze members when they create content too frequently, use the Members Insights report to monitor frozen members and unfreeze them if they aren't spammers.

Members

Frozen Members ▾

Last 30 Days ▾ From 3/1/2016 To 3/30/2016

Unfreeze Member

Filtered by Networks: Created Date

<input type="checkbox"/>	User Type	Member	Last Login
<input type="checkbox"/>	Standard	Anita Kedhar	3/20/2016 11:43 PM
<input type="checkbox"/>	Standard	John	3/29/2016 11:42 PM
<input type="checkbox"/>	Standard	Angela	3/29/2016 2:05 AM

Take a look at one of the Flagged Insights reports to track comments, files, messages, and posts that have been flagged as inappropriate.

Flagged

Visit our Success Community | Help for this Page ?

Flagged Posts ▾

All Time ▾ From To

Unflag Post Delete Post ▾

Filtered by Networks: Created Date

<input type="checkbox"/>	Title	Content	Created On +	Moderated By
<input type="checkbox"/>	-	Hope to see everyone at the Coffee Cake Cookoff this weekend!	6/8/2016	Eric Ware
<input type="checkbox"/>	What's going on with my coffee filter?	I've had some recent issues with my coffee filter and starting to get a little annoyed. I dropped...	6/8/2016	Joe Santana
<input type="checkbox"/>	I just purchased the Tea strainer and am confused how it works...	This is the first time that I'm trying to strain a new type of tea leaf and it just doesn't work ...	6/8/2016	Lisa Wong
<input type="checkbox"/>	Help! Am I going crazy here?	I've been following the brewing instructions for making the perfect latte and just can't seem to ...	6/8/2016	Joe Santana
<input type="checkbox"/>	Need help picking a grinder for my Espresso machine	recently purchased the Platinum Pourover system. looking for coffee grinders that do an amazing j...	6/8/2016	Eric Ware
<input type="checkbox"/>	What's going on with my coffee filter?	I've had some recent issues with my coffee filter and starting to get a little annoyed. I dropped...	6/8/2016	Eric Ware
<input type="checkbox"/>	I just bought my coffee machine and it's stopped working.	I just bought my coffee machine and it's stopped working. Very annoyed ! Can you help?	6/8/2016	Lauren Boyle

To track all your moderation activity in one place, use the Moderation Audit trail Insights report.

Audit Trail Visit our Success Community | Help for this Page

Moderation Audit Freeze Member Unfreeze Member

Custom From To 🔄 ✎ ⚙️

Filtered by Networks: Created Date

Offender	Moderated On	Registered On	Item Type	Action
Lauren Boyle	6/8/2016	6/8/2016	Feed Item	ModerationRuleReview
Lauren Boyle	6/8/2016	6/8/2016	Feed Item	Flagged
Eric Ware	6/8/2016	6/8/2016	Feed Item	ModerationRuleReview
Eric Ware	6/8/2016	6/8/2016	Feed Item	ModerationRuleFlag
Eric Ware	6/8/2016	6/8/2016	Feed Item	Flagged
Eric Ware	6/8/2016	6/8/2016	Feed Item	ModerationRuleBlock
Eric Ware	6/8/2016	6/8/2016	Feed Item	DeletedFlaggedItem
Lauren Boyle	6/8/2016	6/8/2016	Feed Item	ModerationRuleReview
Eric Ware	6/8/2016	6/8/2016	Feed Item	Flagged

Note: In this release, we rearranged and renamed some of the Insights reports to align with the task-based goals of your community managers. If you previously installed the package, your mapped Insights reports appear in the updated locations. However, we can't update existing Insights page labels to match our new page labels. Check out the new navigation and labels in the [Engagement](#) and [Moderation](#) sections. Update your page labels to match.

See the Contents of Posts, Comments, and Private Messages Directly in Insights Reports

We want to save you time. So we now display the contents of posts, comments, and private messages directly in Insights reports. Seeing the contents of these flagged items means you can quickly identify whether the content is inappropriate and act immediately.

Flagged

Flagged Messages Unflag Message Delete Message

All Time From To 🔄 ✎ ⚙️

Filtered by Networks: Created Date

Sender	Message Body	Flagged By	Message ID
John	Spam attack!	Angela	007R0000000AECX
John	I can sell you spam for 99 cents!	Angela	007R000000034c3

Tip: Install the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release. If you previously installed the package, only reports that include the Content or Body fields display the contents. You can add these fields to your existing reports.

To see the contents of private messages, users need the “Moderate Communities Chatter Messages” permission.

With [actionable Insights](#), we’re saving you even more time. Now that you can see the flagged content directly in the report, you can take direct action from the report. For example, you can delete multiple posts from spammers at once directly in the Insights report.

Community Dashboards and Reporting

Easier reporting all around—that’s what we’re bringing you with this release. In communities using Salesforce Tabs + Visualforce, your groups now have their own built-in dashboard called Groups Engagement. All dashboards in Community Management refresh automatically, and you can edit them more easily. You can also tailor reports for your community.

IN THIS SECTION:

[Community Management Dashboards Now Refresh Automatically](#)

All dashboards in Community Management now refresh every 24 hours. No more manual refresh required. If you access the dashboard after a recent refresh, it displays the globally cached data from the last refresh. If the dashboard hasn’t been refreshed for 24 hours, it’s refreshed automatically when you access it in Community Management.

[Edit Your Community Management Dashboards More Easily](#)

You can now click Edit directly on a dashboard page in Community Management to customize a dashboard. Clicking Edit takes you to your Salesforce org. Fewer clicks means happy community managers. Previously, you had to go to the **Dashboards > Settings** page to access the Edit link.

[New Custom Report Types for Community Moderation](#)

You can now create reports that track posts that are pending review and frozen members in your community. You can also create custom report types to view the contents of flagged posts, comments, private messages, and the names of flagged files.

[Take Control of Sharing Wave Analytics for Communities](#)

Sharing Wave Analytics with your community just got easier with a new option in the Wave sharing dialog. Now you have more control over which Wave apps are shared, and you can easily see the sharing status of an app.

[Group Engagement Info in a Beautiful Package](#)

See the engagement and activity of your group in a clean and clear dashboard. Group managers can see activity such as likes, questions, answers, and total posts in one spot.

Community Management Dashboards Now Refresh Automatically

All dashboards in Community Management now refresh every 24 hours. No more manual refresh required. If you access the dashboard after a recent refresh, it displays the globally cached data from the last refresh. If the dashboard hasn’t been refreshed for 24 hours, it’s refreshed automatically when you access it in Community Management.

Edit Your Community Management Dashboards More Easily

You can now click Edit directly on a dashboard page in Community Management to customize a dashboard. Clicking Edit takes you to your Salesforce org. Fewer clicks means happy community managers. Previously, you had to go to the **Dashboards > Settings** page to access the Edit link.

New Custom Report Types for Community Moderation

You can now create reports that track posts that are pending review and frozen members in your community. You can also create custom report types to view the contents of flagged posts, comments, private messages, and the names of flagged files.

Create a custom report type using the following objects and then create your report.

- Report on frozen members:
Networks > Network Members > User Login
- Report on posts that are pending review:
Networks > Unpublished Feed Entities > Feed Posts
- Report on feed items that your members edited:
Networks > Feed Revisions
- View the flagged content in reports, such as the body of a flagged post:
Networks > Network Moderations > Content Documents
Networks > Network Moderations > Feed Posts
Networks > Network Moderations > Feed Comments
Networks > Network Moderations > Private Messages



Tip: You can get preconfigured Insights reports and dashboards in the Salesforce Communities Management package available on the AppExchange shortly after the Summer '16 release.

Take Control of Sharing Wave Analytics for Communities

Sharing Wave Analytics with your community just got easier with a new option in the Wave sharing dialog. Now you have more control over which Wave apps are shared, and you can easily see the sharing status of an app.



Note: Only users with a Customer Community Plus or Partner Community license can use this feature. This feature is supported in communities but not in portals.

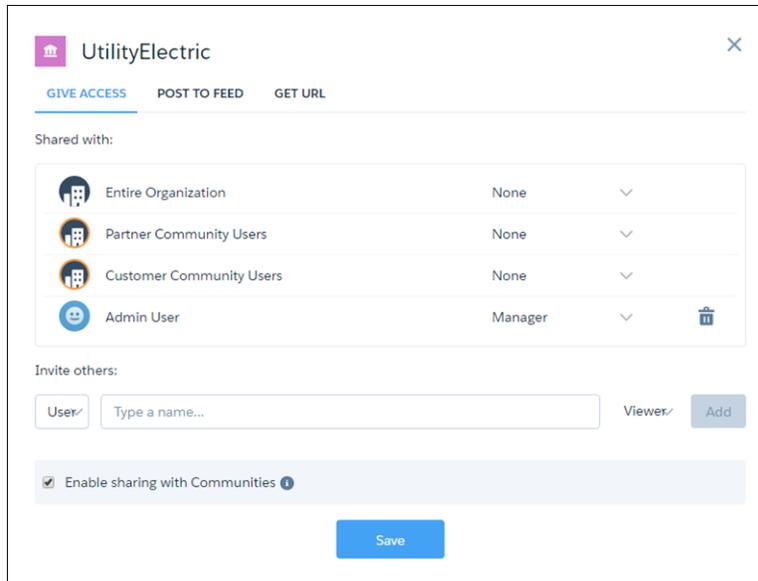
After you've set up Wave for Communities (see [Enable Wave Analytics in Your Community](#)), there's one more step for sharing. From your Wave app, select **Share**. The new sharing dialog includes the option to **Enable sharing with Communities**. If this option isn't selected, then the app and its dashboards aren't accessible to community users and groups.

EDITIONS

Wave Analytics is available in: **Developer Edition**

Wave Analytics is available for an extra cost in:

Enterprise, Performance, and Unlimited Editions



After selecting **Enable sharing with Communities**, you can change the access for community partner and customer users to **Viewer**. Not only do you have more finely grained control over sharing, but you can also see at a glance whether your apps are shared with communities.

SEE ALSO:

[Share Wave with Communities More Easily and Securely](#)

Group Engagement Info in a Beautiful Package

See the engagement and activity of your group in a clean and clear dashboard. Group managers can see activity such as likes, questions, answers, and total posts in one spot.

For more details, check out [Group Activity Info Is Just a Click Away](#)

Other Changes in Communities

Other important changes to Communities include security enhancements, support for end-user languages, and easier navigation between Community Builder and the Developer Console.

IN THIS SECTION:

[Chatter Answers: Change in Availability in Summer '16](#)

Starting in Summer '16, Chatter Answers isn't available in new orgs.

[Communities Now Supports End-User Languages](#)

Salesforce Communities now supports end-user languages for communities with a global reach. Add the languages you want to show in Site.com Studio, under Site Configuration. Guest members can choose their language with the Language Picker once you use the component in your community.

[Allow Internal Users to Log In Using the Community Login Page](#)

If you have an employee community, enabling this feature is a great idea because now your internal users can use their internal credentials on the community login page. After they enter their credentials, they land in the community. And if they navigate to the internal org from the community, they don't have to log in again!

[Delegated External User Admin Permission Now Available for Napili-Based Community Members](#)

Members part of a community using the Napili template can now use the Delegated External User Administration permission to easily manage contacts related to accounts. These tasks were previously available only to external users of Salesforce Tabs + Visualforce communities.

[Navigation Between Community Builder, Developer Console, and Your Community Just Got Easier](#)

Don't you hate when you're working in Community Builder but have to navigate back to Salesforce to access the Developer Console? We do too! So we made accessing the Developer Console easier by adding a link to the profile menu. And users who have access to Community Builder can now get to it from their profile menu in any community.

[Smoother Navigation from Links for Community Members](#)

Members using a Community Builder-based community now have a seamless UI experience, even when clicking URLs not supported by the template.

[Communities Offers Better Identity Verification](#)

Enhanced security features give you better control over identity verification and two-factor authentication in your community.

[Build Your Group Membership in a Flash](#)

Adding members to your group one by one (by one) is a thing of the past. Now, group owners and managers can use an attractive dialog to add multiple members to groups easily and quickly. The dialog presents a recently used list of users for convenience, but search can find any member in the org.

[Broadcast Groups Now in Community Templates](#)

You asked and we listened. By popular request, broadcast groups are now available in community templates. Broadcast groups allow owners and managers to post, but restrict group members to commenting on existing posts.

[Add Profile Tabs in Templates](#)

Make your user profiles parallel to those in Salesforce Classic by adding the same tabs.

Chatter Answers: Change in Availability in Summer '16

Starting in Summer '16, Chatter Answers isn't available in new orgs.

Orgs created before Summer '16 continue to have access to Chatter Answers. As an alternative, we encourage you to use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, you can ask questions to create forum-type discussions and find answers without ever needing to leave Chatter. You can also create cases from questions in Chatter, incorporate Chatter Questions into self-service communities, and find help on the go with the Salesforce1 mobile app.

If you're interested in switching from Chatter Answers to Chatter Questions, contact your Salesforce representative. To learn more about Chatter Questions, see [Chatter Questions](#).

Communities Now Supports End-User Languages

Salesforce Communities now supports end-user languages for communities with a global reach. Add the languages you want to show in Site.com Studio, under Site Configuration. Guest members can choose their language with the Language Picker once you use the component in your community.

The end-user languages also work with fields that support multi-language support.

 **Note:** Salesforce Communities does not support right-to-left languages.

 **Example:** The Language Picker showing various languages.



SEE ALSO:

[Salesforce Help: Which Languages Does Salesforce Support?](#)

Allow Internal Users to Log In Using the Community Login Page

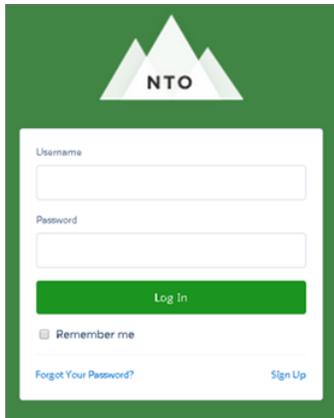
If you have an employee community, enabling this feature is a great idea because now your internal users can use their internal credentials on the community login page. After they enter their credentials, they land in the community. And if they navigate to the internal org from the community, they don't have to log in again!

Previously, internal users had to log in using their internal credentials and access the community through the global header or the link on the All Communities page in Setup.

To enable this feature, select the **Allow internal users to log in directly to the community** option on the Login & Registration page in Community Management.

The **Are you an employee? Log In** link is not displayed on the community login page when the **Allow internal users to log in directly to the community** option is enabled.

 **Note:** The **Forgot Your Password** link on the community login page doesn't work for your internal users. If they need a new password, they can use the **Forgot Your Password** link on the login page for your internal org or contact the admin.



Delegated External User Admin Permission Now Available for Napili-Based Community Members

Members part of a community using the Napili template can now use the Delegated External User Administration permission to easily manage contacts related to accounts. These tasks were previously available only to external users of Salesforce Tabs + Visualforce communities.

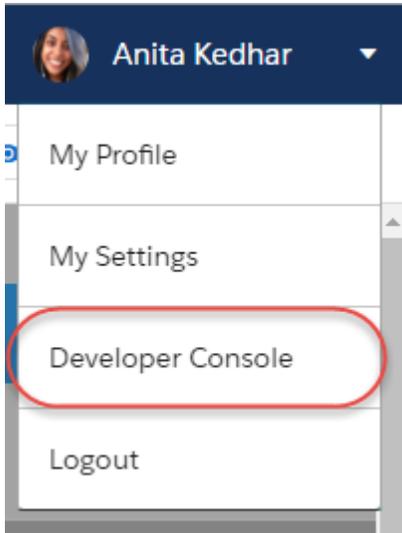
SEE ALSO:

[Salesforce Help: Delegate External User Administration](#)

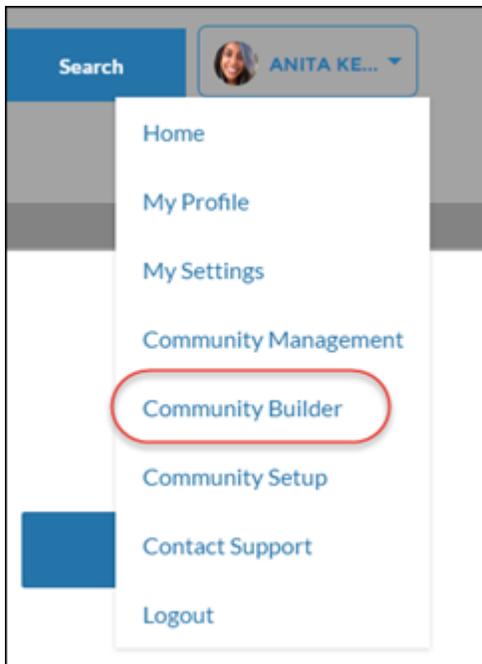
Navigation Between Community Builder, Developer Console, and Your Community Just Got Easier

Don't you hate when you're working in Community Builder but have to navigate back to Salesforce to access the Developer Console? We do too! So we made accessing the Developer Console easier by adding a link to the profile menu. And users who have access to Community Builder can now get to it from their profile menu in any community.

 **Example:** Link to the Developer Console from the profile menu of the Community Builder.



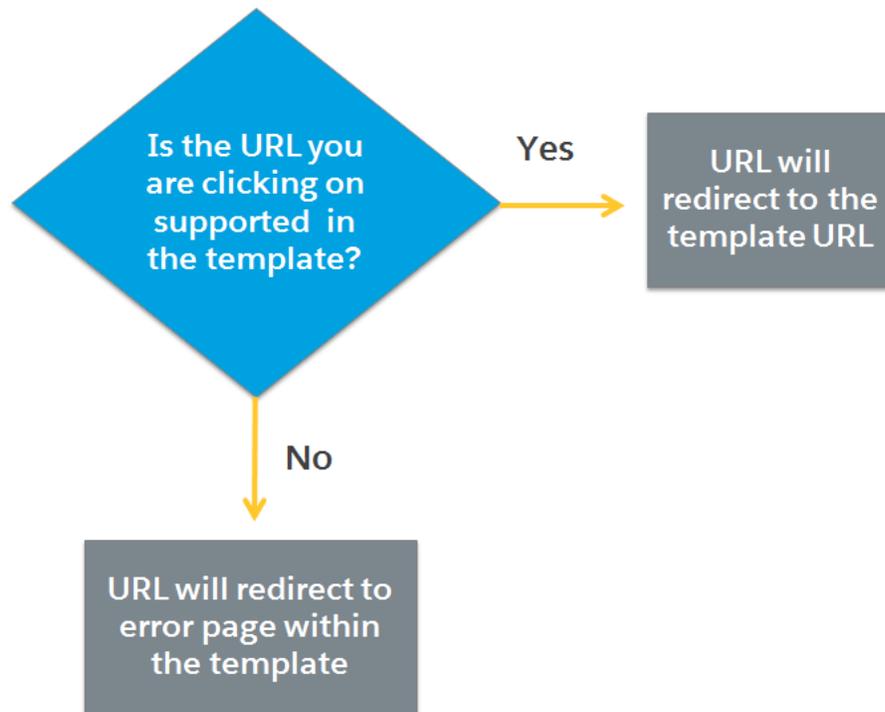
 **Example:** Link to the Community Builder from the profile menu of a community.



Smoother Navigation from Links for Community Members

Members using a Community Builder-based community now have a seamless UI experience, even when clicking URLs not supported by the template.

For Community members:



Now, community members stay in the community, even if the link they click isn't supported.

Community Managers: Need access to a dashboard that isn't supported in your community template? Admins and community managers are still able to access features not supported by the community template, but supported in the Salesforce Tabs + Visualforce user interface.

 **Note:** Links from communities that use a Salesforce Tabs + Visualforce template continue to redirect to a branded page within the community.

Communities Offers Better Identity Verification

Enhanced security features give you better control over identity verification and two-factor authentication in your community.

Set up these features in your community's parent Salesforce org. Although setup of these features is available in both Lightning Experience and Salesforce Classic, Communities is not supported in Lightning Experience, except in Setup.

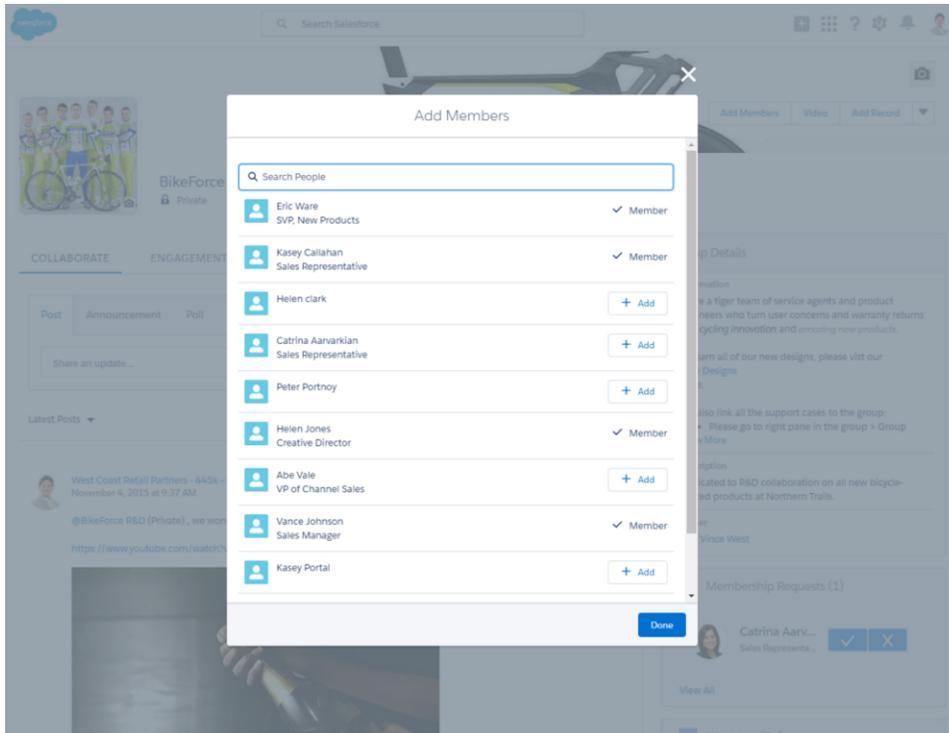
- [Save the Day by Generating a Temporary Verification Code for Users in Distress](#)
- [Email Notifications to Users Confirm Added Verification Methods](#)
- [See How Your Users Are Verifying Their Identity](#)

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Build Your Group Membership in a Flash

Adding members to your group one by one (by one) is a thing of the past. Now, group owners and managers can use an attractive dialog to add multiple members to groups easily and quickly. The dialog presents a recently used list of users for convenience, but search can find any member in the org.



Broadcast Groups Now in Community Templates

You asked and we listened. By popular request, broadcast groups are now available in community templates. Broadcast groups allow owners and managers to post, but restrict group members to commenting on existing posts.

Add Profile Tabs in Templates

Make your user profiles parallel to those in Salesforce Classic by adding the same tabs.

More info right here: [Change Tabs in Lightning Experience and Templates](#)

Chatter: Improved Look and Feel, Group Activity Info, Larger Group and Profile Photos

Enjoy Chatter's improved look and feel in Lightning Experience, access group activity information in a handy tab, and upload bigger, high-resolution photos to your groups and profile. There are several other improvements to feeds, groups, and more.

IN THIS SECTION:

Feeds

Enjoy the improved Chatter look and feel in Lightning Experience and more scrolling, liking, and muting possibilities in the feed.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

Groups

See what's been happening in your group with one click, use larger and high-resolution group images, add a bunch of members at the same time, and get engagement information for groups in a report.

User Profiles

Upload bigger, high-resolution photos and make your profile shine and add tabs to your profiles in Lightning Experience and templates.

Other Changes in Chatter

Smaller changes that improve your experience with Chatter.

Feeds

Enjoy the improved Chatter look and feel in Lightning Experience and more scrolling, liking, and muting possibilities in the feed.

IN THIS SECTION:

[Streamlined Look and Feel for Chatter in Lightning Experience](#)

Enjoy reduced visual noise, a cleaner distinction between threads, and useful controls in more familiar locations. This feature is available in Lightning Experience only.

[Scroll, Scroll, Scroll Your Feed Gently down the Screen](#)

The **View More** button in your feed is almost a thing of the past. In Lightning Experience, we removed all but the first **View More**, providing a smooth, continuous flow all the way to the last post. Scroll with ease in your browser or on your phone. This feature is available in Lightning Experience.

[See Who Liked Your Post in Lightning Experience](#)

If you've been wondering who liked your post in Lightning Experience, wonder no more! We present the **People Who Like This Post** card. This feature is available in Lightning Experience.

[Mute a Feed Item from Its Detail View](#)

You have another way to stop noisy notifications in your email and hide irrelevant posts in your feed: mute a feed item from its detail view. Good-bye hundreds of "congratulations," "happy birthdays," and "me, too's." Hello, meaningful and relevant posts and notifications. This feature is available in Salesforce Classic only.

[More URLs Get Rich Media Previews](#)

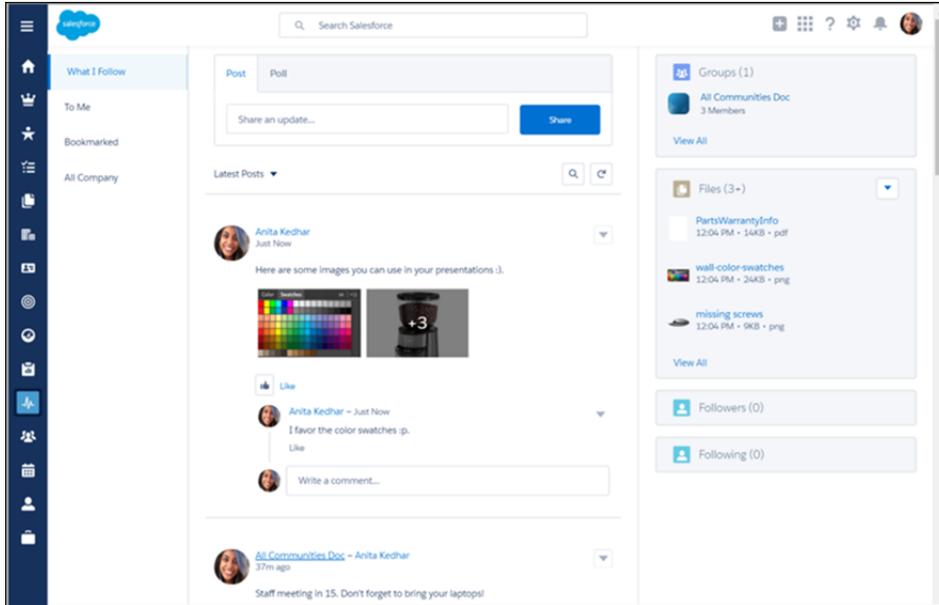
More URLs than ever show previews when you attach a link to a post. We expanded our list of supported URLs from 60 to over 400. And you still get rich previews when the URLs are shortened with third-party shorteners, like bitly, goog.le, and tinyurl.com. This feature is available in both Lightning Experience and Salesforce Classic. Rich media support is also available on your Android and iOS devices in group and record feeds.

[Keep Feed Tracking Updates for Less Time](#)

Want to reduce noise in your feeds? How about shortening the time feed tracking updates appear in them? Ask Salesforce Support about lowering the default number of days feed tracking updates are stored.

Streamlined Look and Feel for Chatter in Lightning Experience

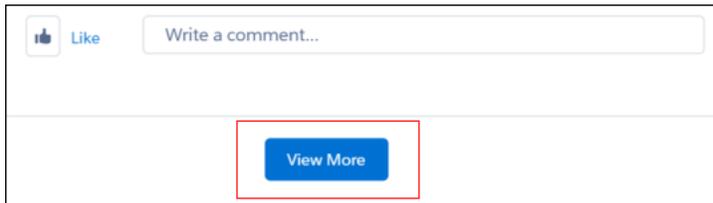
Enjoy reduced visual noise, a cleaner distinction between threads, and useful controls in more familiar locations. This feature is available in Lightning Experience only.



Chatter's new three-column layout moves filters and groups to the left column, where many of you were used to seeing them in Salesforce Classic. Items in the feed are more closely grouped with their comments, making it easier to scan and pick out the thread you're looking for. A limited set of comments reduces the noise of a long discussion. See all comments by clicking, for example, **4 more comments**.

Scroll, Scroll, Scroll Your Feed Gently down the Screen

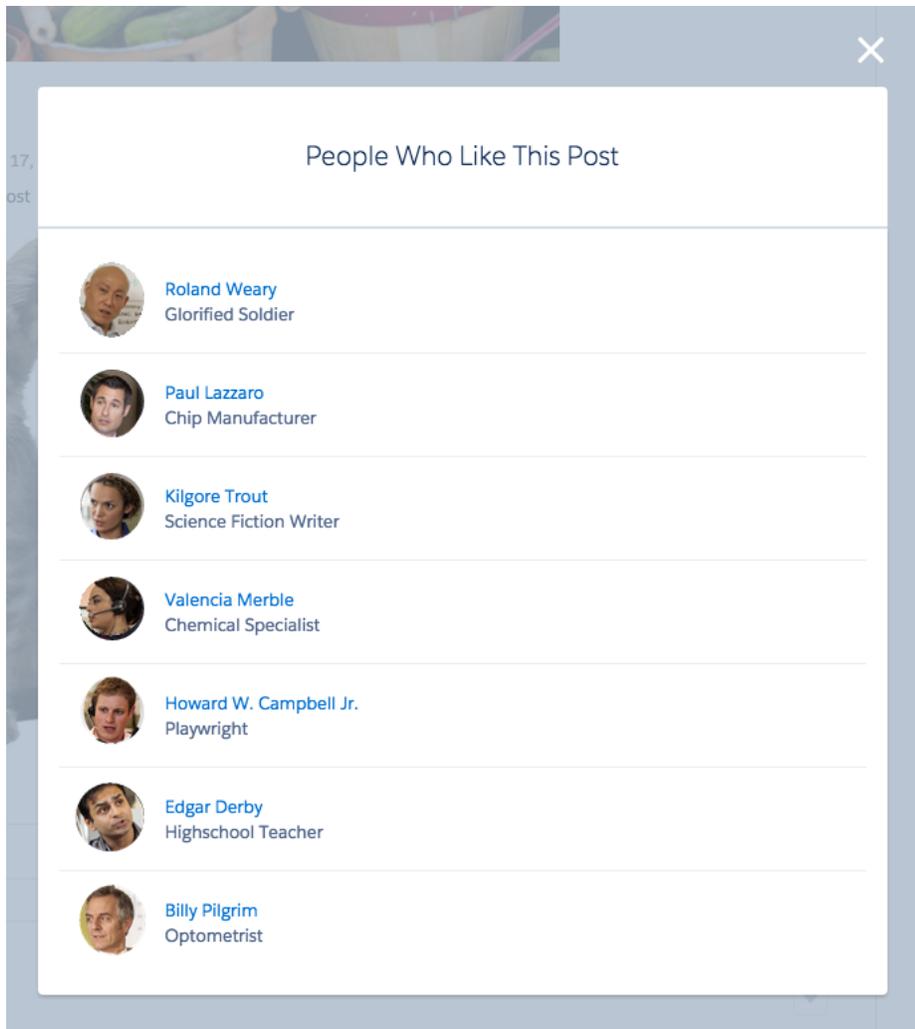
The **View More** button in your feed is almost a thing of the past. In Lightning Experience, we removed all but the first **View More**, providing a smooth, continuous flow all the way to the last post. Scroll with ease in your browser or on your phone. This feature is available in Lightning Experience.



See Who Liked Your Post in Lightning Experience

If you've been wondering who liked your post in Lightning Experience, wonder no more! We present the **People Who Like This Post** card. This feature is available in Lightning Experience.

The **People Who Like This Post** card is available only on posts. It's not available on comments.

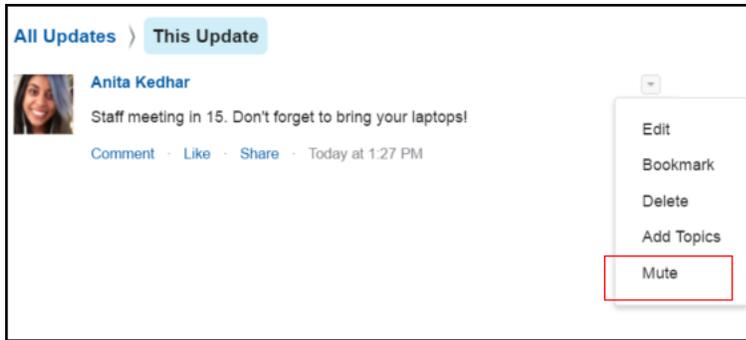


Click the link to the right of  to open the **People Who Like This Post** card. You can see exactly who liked a post and, if you like, jump to their profile.

Mute a Feed Item from Its Detail View

You have another way to stop noisy notifications in your email and hide irrelevant posts in your feed: mute a feed item from its detail view. Good-bye hundreds of “congratulations,” “happy birthdays,” and “me, too’s.” Hello, meaningful and relevant posts and notifications. This feature is available in Salesforce Classic only.

First, go to the post’s detail view. You can get to detail view directly from the email notification by clicking the **View/Comment** button, or from the feed by clicking the post’s date stamp. From the drop-down menu, select **Mute**.



The post no longer appears in your feed on the **Home** and **Chatter** tabs. You can restore the post and its notifications by applying the **Muted** filter and selecting **Unmute** from the post's drop-down menu.

More URLs Get Rich Media Previews

More URLs than ever show previews when you attach a link to a post. We expanded our list of supported URLs from 60 to over 400. And you still get rich previews when the URLs are shortened with third-party shorteners, like bitly, goog.le, and tinyurl.com. This feature is available in both Lightning Experience and Salesforce Classic. Rich media support is also available on your Android and iOS devices in group and record feeds.

 **Note:** For a look-up list of supported URL domains, see ["URL Domains for Rich Link Previews in Feeds."](#)

Keep Feed Tracking Updates for Less Time

Want to reduce noise in your feeds? How about shortening the time feed tracking updates appear in them? Ask Salesforce Support about lowering the default number of days feed tracking updates are stored.

Feed tracking tracks changes to objects and fields and posts them as updates in Chatter. Users who follow a record, see the feed updates in their Chatter feed. Feed tracking updates are useful for noting who did what when. But why keep them any longer than you want to? The feed tracking time limit affects only updates that no one has liked or commented on. The default is 45 days.

Groups

See what's been happening in your group with one click, use larger and high-resolution group images, add a bunch of members at the same time, and get engagement information for groups in a report.

IN THIS SECTION:

[Group Activity Info Is Just a Click Away](#)

The dazzling group member engagement data available in Salesforce Classic with a click of a link is available in Lightning Experience in a handy tab. Group managers can see activity such as likes, questions, answers, and total posts in one spot by clicking the Engagement tab.

[Get Engagement Info for All Groups in One Report](#)

Any group member can run the Groups Engagements report. But wait, there's more! Members can run the Group Engagements Report for all group IDs simply by leaving the field blank. Just the members, posts, questions, and answered counts display. To see the full counts for a group, search for just that group's ID.

[Add Record Types to Groups \(Beta\)](#)

Customize your group by creating record types to meet specific group needs and choosing which profiles can use them.

Email on Announcement Beta Continues and Expands to Communities

Email on Announcement is still available as beta and is now ready for Community users to check it out. Contact Salesforce Support to join the party. And do note that anyone you give permission to use this feature has the potential to spam all members. To prevent announcement overload, train your users to be careful with their new power.

Add Group Members in a Bunch

Gone are the days of building your group membership one member at a time. Use a new dialog to add members in multiples.

Group Pics Go Big

You can now use larger, high-resolution photos for your group image. If your old image appears fuzzy, just hover over or click it, click **Update** or **Update Photo**, and upload an image to fix it.

Group Activity Info Is Just a Click Away

The dazzling group member engagement data available in Salesforce Classic with a click of a link is available in Lightning Experience in a handy tab. Group managers can see activity such as likes, questions, answers, and total posts in one spot by clicking the Engagement tab.

Who sees what and where is determined, in part, by role. In Salesforce Classic, users with the correct perms see members, posts, questions, and answered counts. Owners, admins, and admins with rights to modify an unlisted group see those four counts plus Show Group Report and Group Engagements. In Lightning Experience, all community members can see all the engagement information.



Get Engagement Info for All Groups in One Report

Any group member can run the Groups Engagements report. But wait, there's more! Members can run the Group Engagements Report for all group IDs simply by leaving the field blank. Just the members, posts, questions, and answered counts display. To see the full counts for a group, search for just that group's ID.

To run the report, in Salesforce Classic or communities using Salesforce Tabs + Visualforce, go to a group and click **Group Report**.

Add Record Types to Groups (Beta)

Customize your group by creating record types to meet specific group needs and choosing which profiles can use them.

 **Note:** This release contains a beta version of record types for groups, which means it's a high-quality feature with known limitations. For information on enabling this feature in your org, contact Salesforce. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Email on Announcement Beta Continues and Expands to Communities

Email on Announcement is still available as beta and is now ready for Community users to check it out. Contact Salesforce Support to join the party. And do note that anyone you give permission to use this feature has the potential to spam all members. To prevent announcement overload, train your users to be careful with their new power.

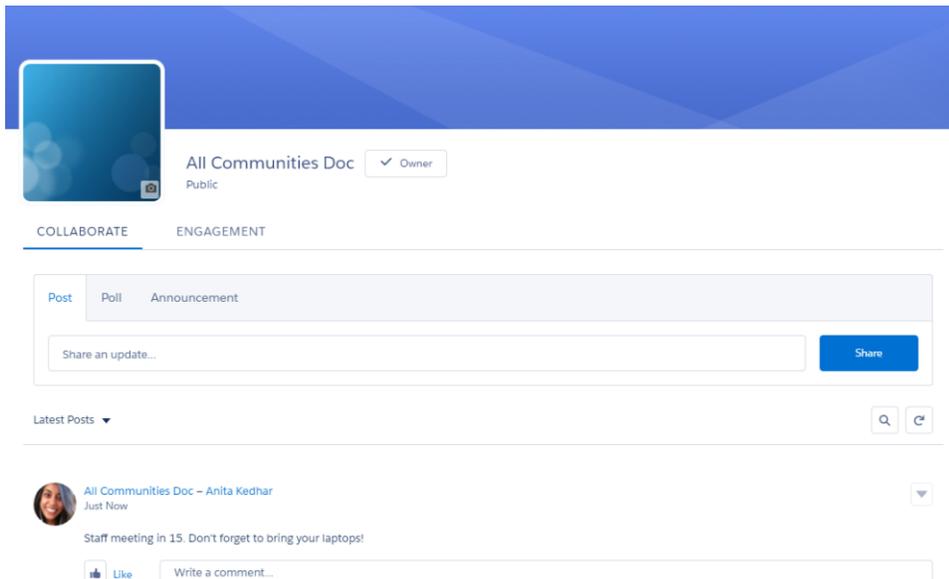
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Gone are the days of building your group membership one member at a time. Use a new dialog to add members in multiples.

For more information, see [Build Your Group Membership in a Flash](#).

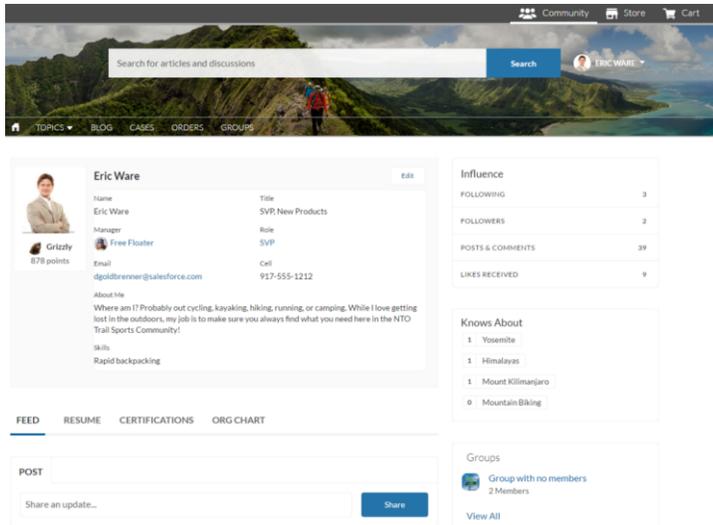
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User Profiles

Upload bigger, high-resolution photos and make your profile shine and add tabs to your profiles in Lightning Experience and templates.



Other Changes in Chatter

Smaller changes that improve your experience with Chatter.

IN THIS SECTION:

[Include Salesforce1 Download Badges in Chatter Email Notifications](#)

All Chatter email notifications from your internal org now include App Store and Google Play badges for the Salesforce1 downloadable apps. Use badges to help increase user adoption of the Salesforce1 mobile app. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

[Control When Email Digests Are Sent with API-Only Chatter Digests](#)

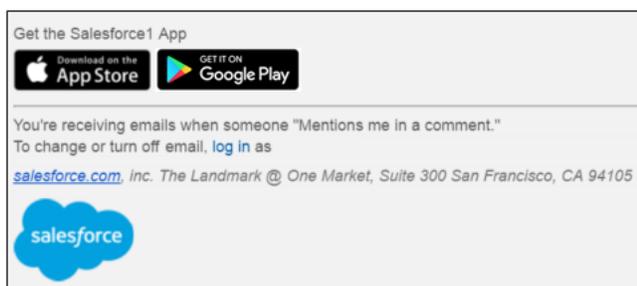
Not a big fan of the Chatter email digest schedules? Use the API to send out daily and weekly digests when you want.

[Update IE to Support TLS1.1 for Chatter Desktop Client for Windows](#)

We're upgrading all Salesforce instances from TLS 1.0 to TLS 1.1 for added security in web server communication. Chatter Desktop users need to adjust their Internet Explorer browser settings before January 2017.

Include Salesforce1 Download Badges in Chatter Email Notifications

All Chatter email notifications from your internal org now include App Store and Google Play badges for the Salesforce1 downloadable apps. Use badges to help increase user adoption of the Salesforce1 mobile app. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.



 **Note:** Download badges don't appear in email notifications from communities.

A recipient's language setting affects whether a download badge appears: if a translation in the recipient's language isn't available, then the badge doesn't appear.

If you don't want to include download badges in email notifications, go to Setup, and in the **Quick Find** box enter *Email Settings*, then select **Email Settings** and deselect **Show Salesforce1 mobile app download badges**.

Control When Email Digests Are Sent with API-Only Chatter Digests

Not a big fan of the Chatter email digest schedules? Use the API to send out daily and weekly digests when you want.

Contact Salesforce to enable API-only Chatter digests. After it's enabled, in Setup enter *Email Settings* in the **Quick Find** box, then select **Email Settings** and **Allow API-only Chatter Digests**.

 **Warning:** Enabling API-only Chatter digests disables the scheduled digests for your org. You must call the API for your users to receive their digests.

We recommend scheduling digest jobs by implementing the Apex `Schedulable` interface with the new `submitDigestJob(period)` method. See [Chatter in Apex release notes](#) for a code example. To monitor your digest jobs from Setup, enter *Background Jobs* in the **Quick Find** box, then select **Background Jobs**.

 **Example:**

All Background Jobs [Help for this Page](#) 

Use this page to monitor background jobs. Please contact salesforce.com if you need to abort a job.

View: All Background Jobs ▼ [Create New View](#)

Action	Submitted Date +	Job Type	Job Sub Type	Status	Percent Complete	Errors	Submitted By	Completion Date
	4/8/2016 1:19 PM	Chatter Unified Digest		Completed	100%	<input type="checkbox"/>		4/8/2016 1:43 PM
	4/8/2016 1:19 PM	Chatter Group Digest		Completed	100%	<input type="checkbox"/>		4/8/2016 1:32 PM

Update IE to Support TLS1.1 for Chatter Desktop Client for Windows

We're upgrading all Salesforce instances from TLS 1.0 to TLS 1.1 for added security in web server communication. Chatter Desktop users need to adjust their Internet Explorer browser settings before January 2017.

For information about how to adjust, see [Knowledge Article 000221755, "Enabling TLS 1.1 and TLS 1.2 in Internet Explorer"](#).

Files: Assign Topics to Files, Browse External Files in Lightning Experience, Connect to Box

Add topics to files, set file access by record, check out external files in Lightning Experience, and much more.

IN THIS SECTION:

[Make Files More Visible with Topics](#)

Topics aren't just for opportunities, events, orders, feed posts, and all those other objects anymore! Now you can add them to your files, too. Adding topics to files is available via API, and in Salesforce Classic. Searching for topics and viewing the feed items they're associated with is available in Salesforce Classic and Salesforce1.

[Toggle Between "Viewer" and "Set by Record" File Access](#)

Files attached to records now have a new way to set access via Sharing Settings. Instead of being limited to *Viewer* access only, you can set access to *Set by Record*. This feature is available in Salesforce Classic only.

[Delete Files Included in Content Packs](#)

File owners can now delete a file without having to first remove it from a content pack, which saves time and streamlines file management. Deleting a file from Salesforce removes all versions of that file from all content packs, including content packs the user doesn't have access to, like those in Private Libraries. This feature is available in Salesforce Classic only.

[Browse External Files from Files Home in Lightning Experience](#)

The Files Connect functionality you love in Salesforce Classic is now available in Lightning Experience. You can browse your external sources from Files home, where you can open, share, and download external files and file references.

[Connect to Box from Salesforce \(Generally Available\)](#)

Let your users access, share, and search Box content right from Salesforce. Salesforce users can share Box files with other Salesforce users, Chatter groups, and records. Files Connect enforces the Box file-sharing rules, so users can choose to share a file only with specific people, with all people in the same Box domain, or to people outside the company. This feature is available in both Lightning Experience and Salesforce Classic.

[Control Whether a Files Connect External Object Is Searchable](#)

Now you can decide whether to let users find an external object's records via SOSL and Salesforce global searches. Validate and sync an external data source to automatically create external objects, then select the new `Allow Search` option for each external object your users need to search. This feature is available in both Lightning Experience and Salesforce Classic.

[Customize File Downloads \(Pilot\)](#)

Using an Apex callback, customize the behavior of files when users download them. ContentVersion supports modified file behavior such as antivirus scan and information rights management (IRM), after the download operation.

EDITIONS

Files and Files Connect for cloud-based external data sources are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in the same editions.

Make Files More Visible with Topics

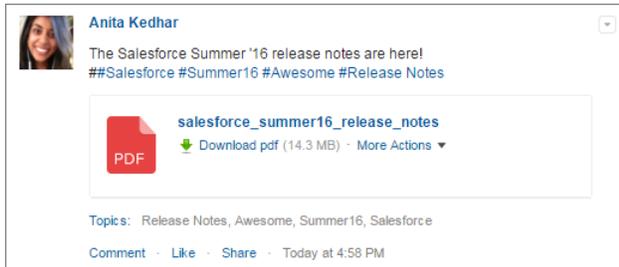
Topics aren't just for opportunities, events, orders, feed posts, and all those other objects anymore! Now you can add them to your files, too. Adding topics to files is available via API, and in Salesforce Classic. Searching for topics and viewing the feed items they're associated with is available in Salesforce Classic and Salesforce1.

Are you one of those cool people who likes to keep up on what's trending? Do you want to know what people are talking about and knowledgeable about? Then you probably know about the power of topics. You add them to your accounts, leads, and other records.

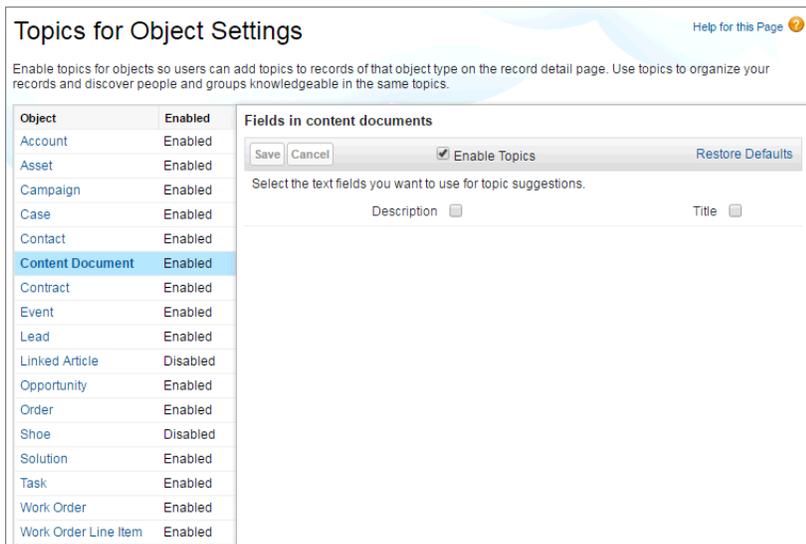
Or you might add them to your Chatter feed posts. In a sea of information, topics bring organization and visibility to help you find what you're looking for. When searching for a topic, you'll see all the records it's assigned to. This now includes...wait for it...files!

How, you ask? There are two ways:

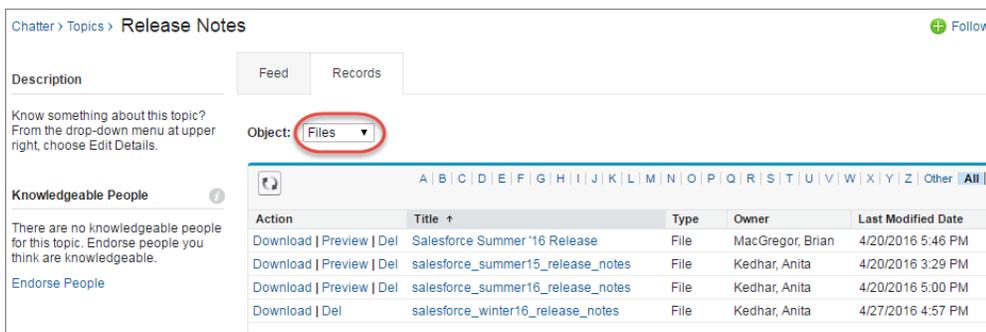
- In Chatter feeds, simply add topics to questions or posts that contain files. They'll get added to those files.
- For developers, add topics to files with [Chatter REST API](#) and [SOAP API](#).



Topics for files are enabled by default on the **Topics for Object** Settings page in Setup, under the object name `Content Document`. From there, you can select fields to use for topic suggestions.



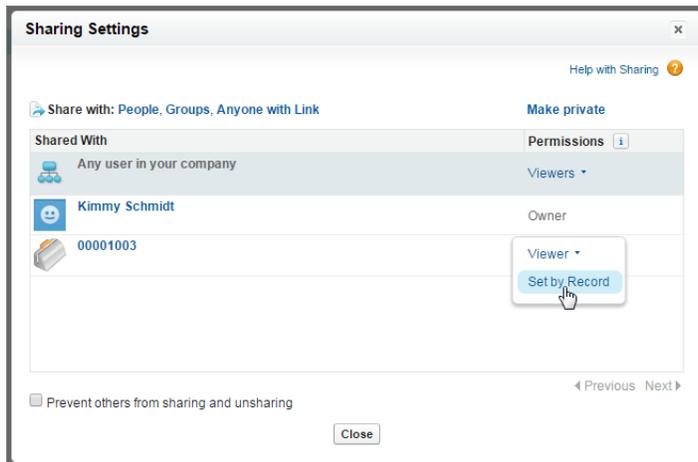
To find files and everything else that's associated with a particular topic, click on the topic in a feed, or go to **Chatter > Topics**. Find the topic you want, go to the **Records** tab, and select **Files** (or the **Feed** tab if the topic isn't associated with any records other than files). In Salesforce1, there's no **Records** tab, but you can view the topic's posts and files when you tap on a topic.



Toggle Between "Viewer" and "Set by Record" File Access

Files attached to records now have a new way to set access via Sharing Settings. Instead of being limited to *Viewer* access only, you can set access to *Set by Record*. This feature is available in Salesforce Classic only.

We introduced the *Set by Record* file sharing status via API only in [Spring '16](#). Now, a toggle is available in the Sharing Settings interface in Salesforce Classic.



Users who have access to a file via a record it's attached to can now have their access set at the record level. When access is set to *Set by Record*, users with view access to the record also have view access to the file; and those who can edit the record can also edit the file. If you have at least *Collaborator* access to the file and any access to the record, you can change this setting again at any time in the file sharing settings. Just look for the record name, and change the access level to *Viewer* or *Set by Record*.

Why is this helpful? Because it lets you grant edit access to a file to those who have read/write access on the record it's attached to.

 **Example:** Let's say you've attached the file *sales_training.pptx* to an account. You want Bruno Mars to be able to edit the account and the file, so you give him read/write access to the account. By default, account and other records grant only *Viewer* access to the files attached to them. Previously, you could only change this *Viewer* access via API. Now you can toggle to *Set by Record* in **Sharing Settings**, which lets Bruno edit not just the record but that sales training deck.

Delete Files Included in Content Packs

File owners can now delete a file without having to first remove it from a content pack, which saves time and streamlines file management. Deleting a file from Salesforce removes all versions of that file from all content packs, including content packs the user doesn't have access to, like those in Private Libraries. This feature is available in Salesforce Classic only.

The file owner and users with delete permission can delete files.

Admins can enable this setting from the Salesforce CRM Content settings page in Setup. The setting is disabled by default.

Browse External Files from Files Home in Lightning Experience

The Files Connect functionality you love in Salesforce Classic is now available in Lightning Experience. You can browse your external sources from Files home, where you can open, share, and download external files and file references.

Select the external data source from the left navigation of Files home. On the right is a list of external files. You can open, share, and download these files from the row-level action or from the file preview.

When you share an external file, a file reference is created. In Lightning Experience, only one file reference is created for an external file, preventing duplicates. Deleting a file reference removes the file reference from Salesforce, but doesn't delete the file in the external source.

SEE ALSO:

[Salesforce Help: Access and Share External Files Using Files Connect \(can be outdated or unavailable during release preview\)](#)

Connect to Box from Salesforce (Generally Available)

Let your users access, share, and search Box content right from Salesforce. Salesforce users can share Box files with other Salesforce users, Chatter groups, and records. Files Connect enforces the Box file-sharing rules, so users can choose to share a file only with specific people, with all people in the same Box domain, or to people outside the company. This feature is available in both Lightning Experience and Salesforce Classic.

Integrate your external content by including it in global Salesforce searches. Box supports SOSL queries, but SOQL queries are not supported.

In all orgs where Files Connect Cloud is supported, Box is an available external data source by default. To enable Box for users, see the "Files Connect Setup Process" in the Salesforce Help.

SEE ALSO:

[Salesforce Help: The Files Connect Setup Process \(can be outdated or unavailable during release preview\)](#)

Control Whether a Files Connect External Object Is Searchable

Now you can decide whether to let users find an external object's records via SOSL and Salesforce global searches. Validate and sync an external data source to automatically create external objects, then select the new `Allow Search` option for each external object your users need to search. This feature is available in both Lightning Experience and Salesforce Classic.

For more information, see [Control Whether an External Object Is Searchable](#).

Customize File Downloads (Pilot)

Using an Apex callback, customize the behavior of files when users download them. `ContentVersion` supports modified file behavior such as antivirus scan and information rights management (IRM), after the download operation.

 **Note:** We provide File Download Customization to selected customers through a pilot program that requires agreement to specific terms and conditions. File Download Customization is subject to change and isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

This feature lets you customize the behavior of files when users download (or attempt to download) them. For example:

- Prevent a file from being downloaded based on the user profile, device being used, file type and size, or IP address.
- Apply IRM control to track information such as the number of times a file has been downloaded.
- Flag suspicious files before download and redirect them for antivirus scanning.

The new `sfc` namespace contains Apex objects for customizing the behavior of Salesforce Files after they are downloaded. `ContentDownloadHandlerFactory` provides an interface for customizing file downloads. The `ContentDownloadHandler`

class defines values related to whether download is allowed, and what to do otherwise. The `ContentDownloadContext` enum is the context in which the download takes place.

Search: Find What You're Looking For Faster

The search experience continues to evolve with users' needs. In Lightning Experience, a more consistent search scope bar order aids navigation on the search results page. We're delivering improved person account and inactive user search results. And spell correction expands to more objects.

For more information, see "Find Information with Search" in Salesforce Help.

EDITIONS

Available in: **All Editions**
except Database.com

IN THIS SECTION:

[Search Scope Bar Order Matches the Navigation Menu in Lightning Experience](#)

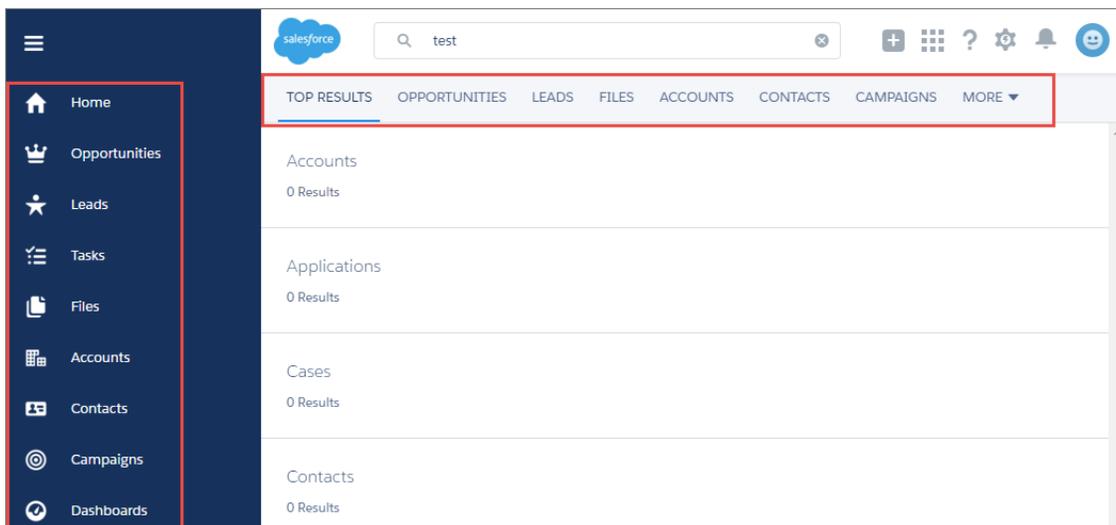
The search scope bar shows searchable objects in the same order they appear in the collapsible navigation menu at the left of the UI. No layout changes required. The familiar order lets users find what they want faster. This feature is available in Lightning Experience only.

[Search: Other Changes](#)

We've enhanced the overall search experience.

Search Scope Bar Order Matches the Navigation Menu in Lightning Experience

The search scope bar shows searchable objects in the same order they appear in the collapsible navigation menu at the left of the UI. No layout changes required. The familiar order lets users find what they want faster. This feature is available in Lightning Experience only.



Top Results is still first in line because it gives users a quick snapshot of the most relevant results for their most frequently used objects.

Don't see an object that's included in the navigation menu in the search scope bar? Check the More drop-down. It lists the objects that couldn't fit in the search scope bar. Still no luck? Most likely the object in the navigation menu isn't searchable, so it doesn't show up in the search scope bar.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Search: Other Changes

We've enhanced the overall search experience.

IN THIS SECTION:

[Search for People Based on Address and Title](#)

It's easier to get more specific, relevant results for the people you're looking for. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. It isn't available in external communities.

[Spell Correction Expanded to More Objects](#)

When users enter a search term that doesn't yield results because of incorrect spelling, they see results that match a corrected spelling of the search term. Spell correction expands to Business Account, Asset, Attachment, Campaign, Case, Contact, Lead, Note, Opportunity, User, and Task objects for English only. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

[Improved Currency Formatting in Search Results in Lightning Experience](#)

We've changed the way that currency displays in search results. For example, instead of USD1000, users see \$1,000.00. This feature is available in Lightning Experience and the Salesforce1 mobile browser app only.

[Inactive Users Show Up in Search Results in Lightning Experience](#)

No more browsing if you need to find an inactive user. This feature is available in Lightning Experience and the Salesforce1 mobile browser app only.

[Encrypt Your Search Index](#)

The index files that support search for your organizations's users can now be encrypted.

Search for People Based on Address and Title

It's easier to get more specific, relevant results for the people you're looking for. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. It isn't available in external communities.

Use the new searchable fields in Salesforce Classic for advanced search, sidebar search, and global search:

- `Address` and `Title` on the People object
- `Address` and `Title` on the User Object

In Lightning Experience and the Salesforce1 mobile browser app:

- `Address` and `Title` on the People object

For more information, see "Searchable Objects and Fields" in Salesforce Help.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Spell Correction Expanded to More Objects

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SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Encrypt Your Search Index

The index files that support search for your organizations's users can now be encrypted.

When you search databases and file systems, the search engine breaks down your search term into smaller parts and looks for matches in the index. Now the files in this index are encrypted using an org-specific AES-256 bit encryption key. This allows us to extend Shield Platform Encryption-strength security to your org-specific search index files.

The beauty of this pilot lies in its effortlessness: there's nothing for admins to set up, and end users won't see anything different in the UI.

 **Note:** The encrypted search index feature is available through a pilot program. For information about joining this pilot, contact your Salesforce account executive.

SEE ALSO:

[Shield Platform Encryption](#)

Data.com: Prospect for Accounts in Lightning Experience, Critical Insights on Opportunities, and More

More key Data.com features are available in Lightning Experience. Data.com Prospector users can check out critical information on companies associated with their opportunities. They can prospect for new companies right from the Accounts page, and access company and industry insights from an account or opportunity. Data.com Premium Clean customers automatically enrich leads with critical company information such as revenue, employee count, and industry. Data.com is available in Salesforce Classic and Lightning Experience.

Data.com delivers leading business data inside Salesforce. Using the Data.com product suite, your sales and marketing teams have all the information they need to convert leads, close deals, and maintain customer relationships. If you want complete, accurate, and relevant customer information, then check out Data.com.

The Data.com Prospector and Data.com Clean product offerings have been simplified. Previously both products were offered with two different levels of data access, corporate and premium. These two levels continue for existing customers. For new customers, there is now a single Data.com Prospector and a single Data.com Clean product offered, each with the full premium data set.

Data.com duplicate management is still included for all Sales Cloud Professional Edition licenses and above, including customers without a Data.com license.

 **Note:** The Data.com database does not contain data from all the countries where Salesforce is used. Data.com documentation may be translated into languages used in countries not represented in the Data.com database.

You can now purchase a Data.com Prospector license as an add-on to your Force.com license. Force.com doesn't work with the Salesforce Lead object.

IN THIS SECTION:

[Data.com Prospector](#)

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts to get the right data to identify and close deals. From Company Hierarchy, you can view corporate hierarchical relationships in an easy to navigate visual interface. Access valuable insights with the click of a button from your Accounts page. Need more contacts? Find the latest contacts for an account with one click, then select and add the contacts you want.

[Data.com Clean](#)

Data.com Clean keeps your records complete and up-to-date. In this release, check out our new *Company Info for Leads* clean rule, which lets Data.com Premium Clean customers automatically add vital company information to Salesforce leads. And, we bid farewell to Data.com Social Key. Data.com Clean features are available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Data.com](#)

Data.com Prospector

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts to get the right data to identify and close deals. From Company Hierarchy, you can view corporate hierarchical relationships in an easy to navigate visual interface. Access valuable insights with the click of a button from your Accounts page. Need more contacts? Find the latest contacts for an account with one click, then select and add the contacts you want.

EDITIONS

Data.com Prospector is available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

[Get Prospecting Insights from Your Opportunity and Account Detail Page](#)

Your sales reps are always crunched for time, and while Salesforce Classic continues to provide valuable Prospecting Insights, your reps can now access insights in the Lightning Experience.

[Find and Add New Accounts from the Account Page in the Lightning Experience](#)

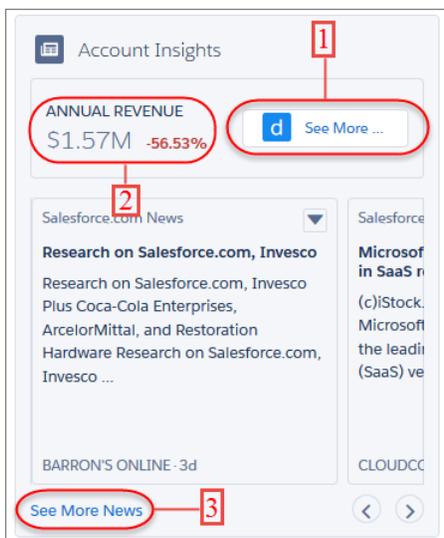
Sales reps can add accounts to your org in just a few clicks. Filter by annual revenue, company name or website, country, location type, or state. With a Data.com Prospector license, reps get the data they need when they need it.

Get Prospecting Insights from Your Opportunity and Account Detail Page

Your sales reps are always crunched for time, and while Salesforce Classic continues to provide valuable Prospecting Insights, your reps can now access insights in the Lightning Experience.

Watch a demo: [▶ Prospecting Insights in Lightning](#)

(1) When reps click **See More Insight**, they can quickly identify customer account's business and financial details and understand the competitive landscape. Your reps can find the insights they need from the opportunity or account detail pages. See essential industry and financial details and explore hierarchical company relationships for your account. Be ready to land the deal using call preparation questions and industry summaries, all available through Prospecting Insights. (2) The Insights preview gives your reps key financial information about the accounts annual revenue and yearly growth. (3) If your reps want detailed news about the account, they can click **See More News**.



In Lightning Experience, Prospecting Insights give your reps highly relevant information that helps guide customer conversations. Account insights and company linkages are all in one location for a more efficient and customer focused experience.

⚠ Important: Prospecting Insights are available only for records that were imported from, or cleaned by, Data.com.

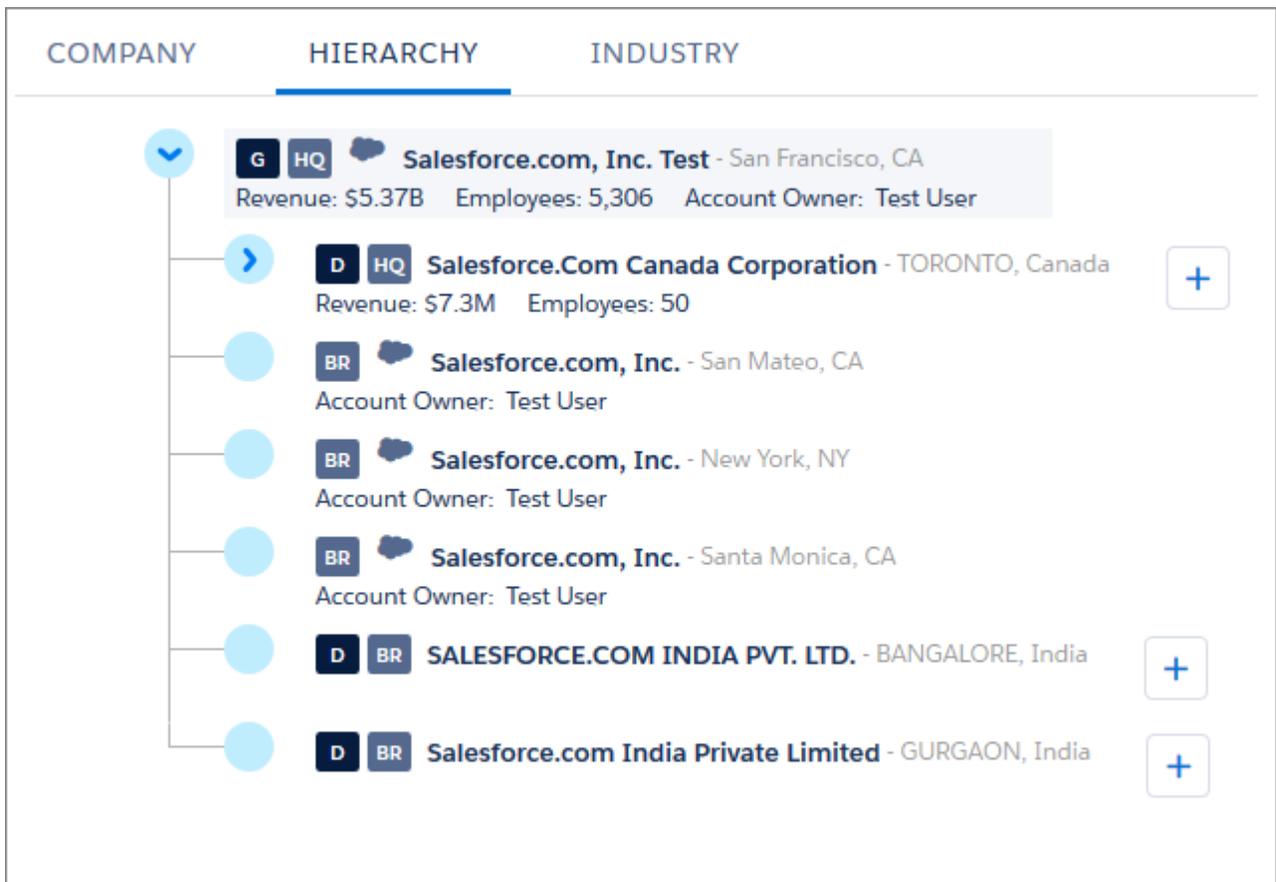
To see complete insights, click **See More Insights** on an account or opportunity details page.

Company

Your reps have a company overview, financial details, a list of top competitors, and a breakdown of account contacts are at their fingertips. From the company page, reps get a glimpse of the account and its linkage to other accounts. View the contacts by level or department. Reps and admins can view a list of contacts available to add to your CRM.

Hierarchy

Your sales reps can view and understand company linkages right from the insights page in the Company Hierarchy preview or go to the **HIERARCHY** tab on the Insights page for more details.



Admins can add the **Company Hierarchy** preview components to other pages with Lightning App Builder.

Industry

The Industry tab provides your reps with information so they can intelligently engage with an account.

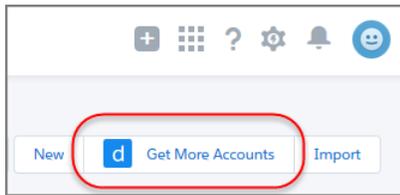
- **Industry Details**—View details about the accounts industry as identified by SIC and NAICS codes and descriptions.
- **Competitive Landscape**—Understand the potential of the account in its related industry.
- **Trends**—Understand the account's financial situation and identify potential growth areas.
- **Opportunities**—Peruse the various account opportunities.
- **Call Prep**—Prepare for a call with detailed Q&A.
- **Industry Websites**—Link to the websites of the account's top competitors.

Important: Professional Edition Data.com customers must manually add the Data.com Key to the Accounts page layout for the Insights feature to work properly.

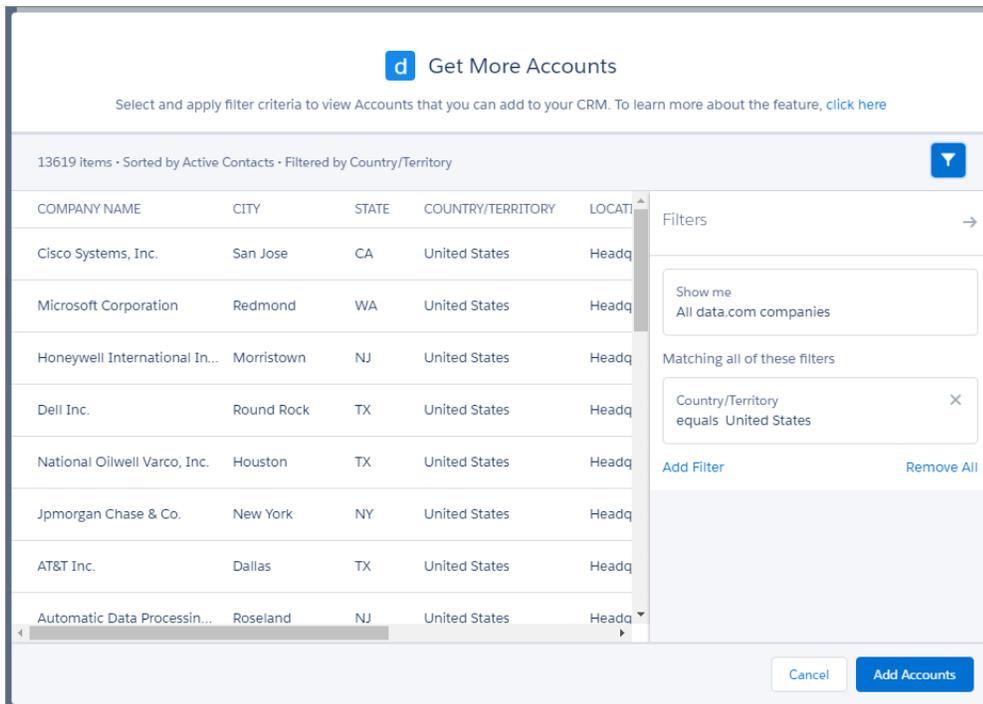
Find and Add New Accounts from the Account Page in the Lightning Experience

Sales reps can add accounts to your org in just a few clicks. Filter by annual revenue, company name or website, country, location type, or state. With a Data.com Prospector license, reps get the data they need when they need it.

When reps click **Get More Accounts**, they get a list view of Data.com accounts.



Your sales operation managers and reps can filter the list of Data.com accounts available to add to your CRM.



Filter on key fields to identify the companies you need.

Annual Revenue

Select a conditional operator and enter a numeric value for the annual revenue of a company. Enter 1000000 and not 1M.

Important: You can't use Annual Revenue as the only filter criterion. You must use it with another filter.

Name or Website

Enter the company name or website. A wildcard search is applied when you enter a partial name or website.

Country/Territory

Select from the list of countries.

Location Type

Select branch, headquarters, or single Location.

Important: You can't use Location Type as the only filter criterion. You must use it with another filter.

State

A two-letter abbreviation for a state of the United States, a province in another country, or a U.S. territory.

Important: The State filter works only when the Country filter is set to United States or a U.S. territory.

Sales operations managers and reps can add up to 20 accounts at a time. Use the plus (+) icon to add an account.

COMPANY NAME	CITY	STATE	COUNTRY/TERRITORY
Salesforce.com, Inc. Test			
Salesforce.com, Inc.			
Salesforcecom Inc			
Salesforce.com, Inc.			

	Salesforce.com, Inc. ...		
ADDRESS	INDUSTRY CODES		
1 Market Ste 300, San Francisco, CA 94105-5...	7372 - Prepackaged Softw...		
EMPLOYEE COUNT	ANNUAL REVENUE		
5,306	\$5,373,586,000		

From the search results, move the cursor over the company name to see a preview of the account details.

Data.com Clean

Data.com Clean keeps your records complete and up-to-date. In this release, check out our new *Company Info for Leads* clean rule, which lets Data.com Premium Clean customers automatically add vital company information to Salesforce leads. And, we bid farewell to Data.com Social Key. Data.com Clean features are available in both Lightning Experience and Salesforce Classic.

 **Note:** To learn about availability of a specific Data.com Clean feature in Lightning Experience, see “Data Import and Management: What’s Not in Lightning Experience” in the Salesforce Help. check out [Data.com](#).

EDITIONS

Data.com Clean available in: **Professional, Enterprise, Performance, and Unlimited Editions**

IN THIS SECTION:

[Automatically Enrich Leads with Critical Company Information \(Generally Available\)](#)

Make it easier for your reps to pursue the most promising leads, and assign them to the right territories and campaigns. If your org has Data.com Premium Clean, it’s a cinch! In just a few clicks, you can set up and activate the new *Company Info for Leads* clean rule for your organization. Then, valuable company information from Data.com is automatically added to existing *and* new Salesforce leads, including annual revenue, industry, D-U-N-S number, and more! You can set up clean rules in Salesforce Classic only, but you can check the status of clean rules in both Salesforce Classic and Lightning Experience.

[Retirement of Data.com Social Key](#)

As of Summer '16, Data.com Social Key and the Data.com Social Profile Match API are bidding us a fond farewell. These features are no longer available.

Automatically Enrich Leads with Critical Company Information (Generally Available)

Make it easier for your reps to pursue the most promising leads, and assign them to the right territories and campaigns. If your org has Data.com Premium Clean, it’s a cinch! In just a few clicks, you can set up and activate the new *Company Info for Leads* clean rule for your organization. Then, valuable company information from Data.com is automatically added to existing *and* new Salesforce leads, including annual revenue, industry, D-U-N-S number, and more! You can set up clean rules in Salesforce Classic only, but you can check the status of clean rules in both Salesforce Classic and Lightning Experience.

Even if your leads have only a name and email address, you can add a ton of valuable company information. That could be the difference between converting a lead and wasting your reps’ time.

You get:

- Annual Revenue

EDITIONS

Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance, and Unlimited Editions**

- Company D-U-N-S Number
- D&B Company*
- Industry
- No. of Employees

*The D&B Company field is linked to over 100 more fields with company, industry, and financial information.

Here's how it works. After you set up and activate the `Company Info for Leads` clean rule, we check your existing leads to see if new data is available. New leads are checked when they're saved. If new data is available, we fill in any blanks—we don't overwrite any existing data. Critical company information where and when you need it!

IN THIS SECTION:

[Set Up the Company Info for Leads Clean Rule](#)

Using the `Company Info for Leads` Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing and new Salesforce leads.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

[Automatically Get Geocodes for Addresses \(Generally Available\)](#)

Set Up the `Company Info for Leads` Clean Rule

Using the `Company Info for Leads` Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing and new Salesforce leads.

1. From Setup, enter `Clean Rules` in the `Quick Find` box, then select **Clean Rules**.
2. Edit the `Company Info for Leads` clean rule.
3. Review your clean rule settings. To add company information to all existing leads, select **Clean all records when this rule is activated or saved**.
4. Save the rule.
5. Activate the rule.
If you selected `Clean all records when this rule is activated or saved`, your existing leads are checked to see if new data is available. New leads are checked when they're saved. If new data is available, we fill in any blanks—we don't overwrite any data.
6. In Salesforce Classic, if you want to check the status of the `Company Info for Leads` clean rule, add the `Clean This Record with Data.com` related list to the page layout for leads. (In Lightning Experience, this step isn't necessary!)

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional, Enterprise, Performance,** and **Unlimited** Editions

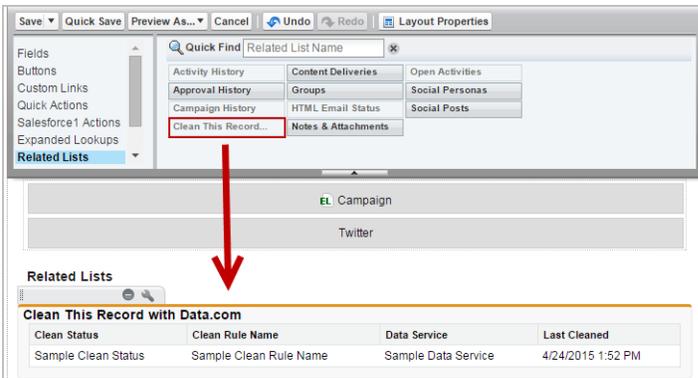
USER PERMISSIONS

To set up and activate clean rules:

- "Customize Application"

To edit page layouts:

- "Customize Application"



Retirement of Data.com Social Key

As of Summer '16, Data.com Social Key and the Data.com Social Profile Match API are bidding us a fond farewell. These features are no longer available.

Data.com Social Key and the Data.com Social Profile Match API, social profile handles, such as those from LinkedIn®, are no longer added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles. You can still manually associate social profile handles with records.

Customization: Lightning Pages Galore and Visualizations for Your Org's Activities

What new point-and-click powers have we unleashed this time? Let us count the ways! Lightning page admins can edit not only record pages but the Home page, too. Get stunning Wave visualizations of your org's activities, like who's logging in from where. And if automation is your game, your processes don't have to stop after an action group is executed—they can keep going like the little process that could.

Customization features help you expand your org by enhancing your objects, data, and fields, customizing your org's look and feel, augmenting your business processes, creating websites, and creating apps—all by using point-and-click tools and maybe some code.

IN THIS SECTION:

[Lightning App Builder](#)

Editing record pages in Lightning Experience is now generally available. And not only that, you can edit the Home page, too! But did we stop there? No! We've also enhanced the Report Chart standard component and made App Page Lightning pages available in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

[Event Monitoring](#)

We're bringing you the first ever Wave Analytics app specifically built for tracking events. You never knew auditing could be this beautiful.

[Process Builder](#)

The list of new Process Builder features is small but the impact is big! Now your process can execute multiple action groups at one time, giving you more ways to automate your business and manage everything in one place. This feature is available in both Lightning Experience and Salesforce Classic.

[Picklist Administration](#)

If you can dream a picklist, you can do it in Salesforce. Managing picklist values has never been easier, with efficient ways to keep your picklists current with business needs. Global picklists let you share values across objects and custom picklists while maintaining values in one place. Restricted picklists help keep your record data clean. And you can manage picklist values conveniently from Setup with lots of options for adding, replacing, or removing values.

[Lightning Experience Setup](#)

Get around Lightning Experience more easily with a couple of Setup navigation improvements. You can edit objects and see object details with fewer clicks. From the Object Manager, you can see all the custom record pages you've created for that object and which record page is active. This feature is available only in Lightning Experience.

[Data Import](#)

We're retiring the legacy data import tools, so start using the Data Import Wizard. We're making incremental improvements to help with the transition.

[Visual Workflow](#)

In addition to some generally available enhancements, like how we treat percentage values, we're rolling out two awesome pilots! One to add flows to any Lightning page, and another to build your own flow run time experience. This feature is available in both Lightning Experience and Salesforce Classic.

[External Data](#)

Previously called Lightning Connect, Salesforce Connect expands your options for interacting with data that's stored outside your Salesforce org. We've made improvements to external object searches and the user interface.

[Other Changes in Customization](#)

Enjoy greater flexibility with actions, control user access to sessions with permission sets, and get more details about users' access to records on the sharing detail page.

Lightning App Builder

Editing record pages in Lightning Experience is now generally available. And not only that, you can edit the Home page, too! But did we stop there? No! We've also enhanced the Report Chart standard component and made App Page Lightning pages available in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

IN THIS SECTION:

[Create and Edit Lightning Experience Record Pages \(Generally Available\)](#)

Customizing Lightning Experience record pages is now available to everyone! Create a record page from scratch, or make a copy of an existing record page right from the Setup menu. Give your users a customized view for each object's records by adding, editing, or removing components to change the page's layout. This feature is available in Lightning Experience only.

[Home: Customize Home for Different User Profiles \(Generally Available\)](#)

You asked for it, and we've delivered! Use the Lightning App Builder to create custom Home pages that appear for different profiles in your org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records! This feature is available in Lightning Experience only.

[Add Your App Pages to Lightning Experience](#)

Give your users easy access to the objects and items that are most important in your custom app by activating it for Lightning Experience. The App Page type of Lightning Page, previously available only in Salesforce1, is now supported in Lightning Experience.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

[Assign Filters to Report Chart Components in Lightning Experience](#)

You can now assign a filter to the data displayed in a Report Chart standard Lightning component when it displays on record pages in Lightning Experience. If you set a filter option for a Report Chart component on a record page, the component displays only that filtered data when users view the page. This feature is available in Lightning Experience only.

SEE ALSO:

[Give Your Lightning Experience and Salesforce1 Users the Power of Flows \(Pilot\)](#)

[Embed Wave Dashboards in Lightning Pages \(Generally Available\)](#)

Create and Edit Lightning Experience Record Pages (Generally Available)

Customizing Lightning Experience record pages is now available to everyone! Create a record page from scratch, or make a copy of an existing record page right from the Setup menu. Give your users a customized view for each object's records by adding, editing, or removing components to change the page's layout. This feature is available in Lightning Experience only.

You can create a custom Lightning Experience record page in two ways.

- From the Setup menu on a record page in Lightning Experience, select **Edit Page**.
When you select Edit Page for the first time, Salesforce makes a copy of the page. This copy is what you then edit in the Lightning App Builder. If a customized page already exists and is active, selecting Edit Page opens that page to edit.
- In either Lightning Experience or Salesforce Classic, create a page from scratch by clicking **New** from the Lightning App Builder list page in Setup.

For its inaugural release, creating and editing Lightning Experience record pages is supported for these objects:

- Account
- Asset
- Campaign
- Campaign Member
- Case
- Contact
- Content Document
- Custom External Object
- Custom Object
- Custom Person Object
- Event
- Group
- Lead
- Note
- Opportunity
- Price Book
- Price Book Entry
- Process Instance Step
- Process Instance Work Item
- Product

- Task
- User
- Work Order

SEE ALSO:

[Salesforce Help: Configure Lightning Experience Record Pages Using the Lightning App Builder](#)

[View Your Lightning Record Pages in the Object Manager](#)

[Enforce Access Check Errors \(Critical Update\)](#)

[Lightning Experience Features in This Release](#)

[IdeaExchange: Add a Visualforce Page/Component inline on "Edit" page](#)

[IdeaExchange: Switch Tab Position for Feed-based Page Layouts](#)

[IdeaExchange: Add text box for instructions / reminders to the page layout](#)

Home: Customize Home for Different User Profiles (Generally Available)

You asked for it, and we've delivered! Use the Lightning App Builder to create custom Home pages that appear for different profiles in your org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records! This feature is available in Lightning Experience only.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Create and Edit Lightning Experience Home Pages](#)

Maximize the relevance of the Home page for different types of users. Don't need the performance chart or Top Deals for your service reps? Then assign them a different Home page that shows new cases and top pain points. Customize the default Home page, and assign custom pages for different profiles. This feature is available in Lightning Experience only.

[Set a New Default Home Page](#)

Set a new default Home page to surface the information that's most relevant for your users. All users see the default Home page unless they have profiles that are assigned to another Home page. This feature is available in Lightning Experience only.

[Assign Custom Home Pages to Specific Profiles](#)

Do you have different types of users that need access to different things on their respective Home pages? Of course you do! Assign pages to different profiles to give your users access to a Home page perfect for their role. This feature is available in Lightning Experience only.

SEE ALSO:

[Lightning App Builder](#)

[Lightning Experience Features in This Release](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Add Your App Pages to Lightning Experience

Give your users easy access to the objects and items that are most important in your custom app by activating it for Lightning Experience. The App Page type of Lightning Page, previously available only in Salesforce1, is now supported in Lightning Experience.

If you have an app page already active for Salesforce1, you can make it available in Lightning Experience with one of these methods.

- Use the activation feature in the Lightning App Builder.
- Add the app page's Lightning Page tab to a custom Lightning Experience navigation menu in Setup.

SEE ALSO:

[Lightning Experience Features in This Release](#)

Assign Filters to Report Chart Components in Lightning Experience

You can now assign a filter to the data displayed in a Report Chart standard Lightning component when it displays on record pages in Lightning Experience. If you set a filter option for a Report Chart component on a record page, the component displays only that filtered data when users view the page. This feature is available in Lightning Experience only.

Event Monitoring

We're bringing you the first ever Wave Analytics app specifically built for tracking events. You never knew auditing could be this beautiful.

IN THIS SECTION:

[Event Monitoring Wave App \(GA\)](#)

The Event Monitoring Wave App brings your org's event monitoring data to life with built-in Wave integration.

Event Monitoring Wave App (GA)

The Event Monitoring Wave App brings your org's event monitoring data to life with built-in Wave integration.



Note: Now as part of Event Monitoring, you also get the Event Monitoring Wave App. Use this app to upload and access only the data provided to you as part of your subscription. Please prevent your users from using the app to upload or access any other data. Salesforce sometimes monitors such usage. The Event Monitoring Wave App is available in English only.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

The Event Monitoring Wave App is an out-of-the-box visualization app for event monitoring in Salesforce. The app comes with datasets and prebuilt dashboards that automatically pull event log file data from your org right into the stunning Wave platform.

The app's dashboards give you valuable, at-a-glance insights into your org's activities. For example, you can easily see how many people and IP addresses are accessing your org, which Visualforce requests are timing out, and which users are making changes in Setup.

Setting up the Event Monitoring Wave App is easy. The setup wizard lets you pick which datasets you want to load. You can also choose how many days you want to store information from each dataset in Wave. Once you finish the wizard, you can sit back, relax, and watch the data pour in.

For customers that participated in the Admin Analytics pilot, there are some important points to note.

- To avoid seeing inaccurate data, we recommend deleting any existing instances of the Event Monitoring Wave App and creating a fresh version for this release.
- Only EventLogFile records generated during the Summer '16 release appear in the Event Monitoring Wave App. Even if you have Spring '16 logs with data retention that spills into Summer '16, you can't see them in the app.

To enable event log file integration with the Event Monitoring Wave App, just flip the switch on the Event Monitoring Setup page.

Process Builder

The list of new Process Builder features is small but the impact is big! Now your process can execute multiple action groups at one time, giving you more ways to automate your business and manage everything in one place. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

IN THIS SECTION:

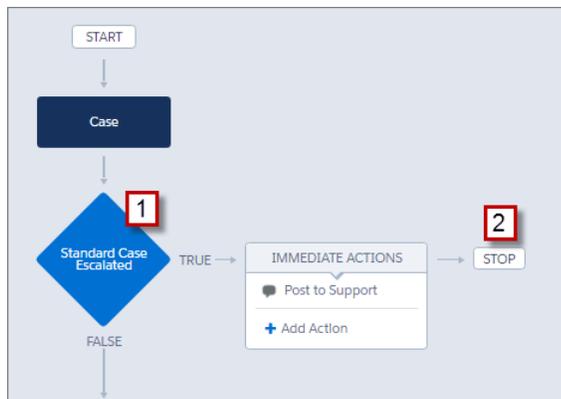
[Processes Can Execute Actions on More Than One Criteria](#)

Now you can choose what happens after your process executes a specific action group. Should the process stop, or should it continue evaluating the next criteria in the process? It's up to you! Best of all, executing multiple action groups in a single process makes it easy to manage all of your processes for a given object, like a Case, in one place.

Processes Can Execute Actions on More Than One Criteria

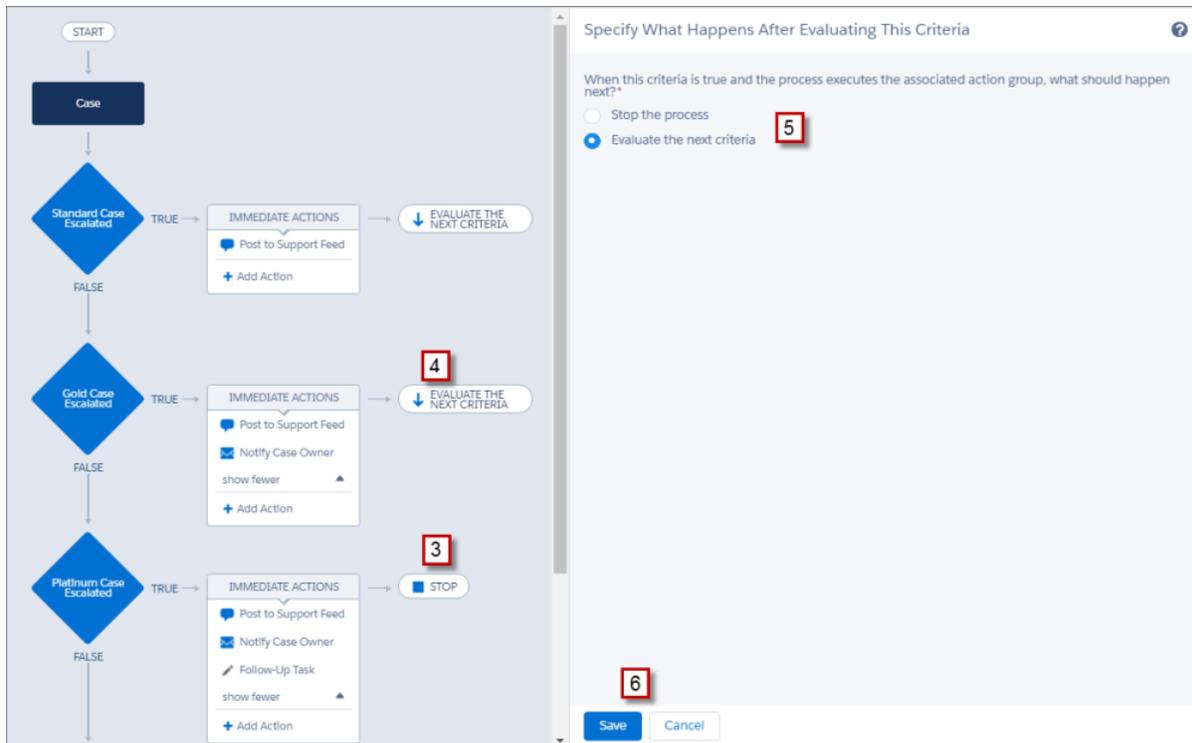
Now you can choose what happens after your process executes a specific action group. Should the process stop, or should it continue evaluating the next criteria in the process? It's up to you! Best of all, executing multiple action groups in a single process makes it easy to manage all of your processes for a given object, like a Case, in one place.

Previously, when a record met your defined criteria **(1)**, the process executed the associated action group and then stopped **(2)**.



Now you can specify when to stop or continue your process. It's easy.

1. First, make sure you've defined the next criteria and that your action group includes only immediate actions. You can't evaluate the next criteria when an action group contains scheduled actions.
2. Click **STOP (3)** or **EVALUATE THE NEXT CRITERIA (4)** to change what happens after actions execute. Initially, each action group is set to stop after executing actions.



3. Make your selection (5), save your changes (6), and your choice appears on the canvas.

Picklist Administration

If you can dream a picklist, you can do it in Salesforce. Managing picklist values has never been easier, with efficient ways to keep your picklists current with business needs. Global picklists let you share values across objects and custom picklists while maintaining values in one place. Restricted picklists help keep your record data clean. And you can manage picklist values conveniently from Setup with lots of options for adding, replacing, or removing values.

EDITIONS

Available in all editions

IN THIS SECTION:

[Supercharge Your Picklist Fields with Global Picklists \(Beta\)](#)

Simplify picklist management with global picklists. Now in beta, global picklists are available in every org. Global picklists let you efficiently reuse a single list of values for multiple custom picklist fields. Easily share picklists across objects by creating picklist fields that use a *picklist value set* from a global picklist. And because global picklists are always restricted, your picklist data stays clean because users can't add erroneous or redundant values through the API. This feature is available in both Lightning Experience and Salesforce Classic.

[Track Where Global Picklists Are Used More Easily](#)

We simplified keeping track of your shared custom picklist values. Each global picklist's detail page shows where its picklist value set is used. This feature is available in Salesforce Classic only.

[Eliminate Picklist Clutter with Restricted Picklists \(Generally Available\)](#)

If you haven't tried restricted picklists yet, get ready to enjoy clutter-free picklists! This feature is now available in every org. A restricted picklist field enforces the integrity of picklist data by including only the values that you've defined. Your picklist data stays clean, because users can't add erroneous or redundant values. This feature is available in both Lightning Experience and Salesforce Classic.

Organize Restricted Picklists by Managing Inactive Values

Conveniently deactivate or reactivate values in restricted picklists to keep up with changing business needs without deleting values before you're ready. Now you can phase out a value from a restricted picklist without disrupting the existing records that use that picklist value. When you're sure you no longer need the value for future records, you can simply delete it. This streamlined procedure works for global picklists and all other custom restricted picklists. Global picklists are available in Salesforce Classic only. All other restricted picklists are available in both Salesforce Classic and Lightning Experience.

Remove a Picklist Field Value from Records

Don't need that old picklist value muddying your record data? Problem solved: There's now an easy way to remove a picklist value from all records in your org. This process works for standard and custom picklists (restricted or unrestricted). This feature is available in both Lightning Experience and Salesforce Classic.

Supercharge Your Picklist Fields with Global Picklists (Beta)

Simplify picklist management with global picklists. Now in beta, global picklists are available in every org. Global picklists let you efficiently reuse a single list of values for multiple custom picklist fields. Easily share picklists across objects by creating picklist fields that use a *picklist value set* from a global picklist. And because global picklists are always restricted, your picklist data stays clean because users can't add erroneous or redundant values through the API. This feature is available in both Lightning Experience and Salesforce Classic.

 **Note:** This release contains a beta version of global picklists that's production-quality but has known limitations. To provide feedback or suggestions for global picklists, visit the [Global, Restricted Custom Picklists group in the Salesforce Success Community](#).

A Protected Set of Reusable Values

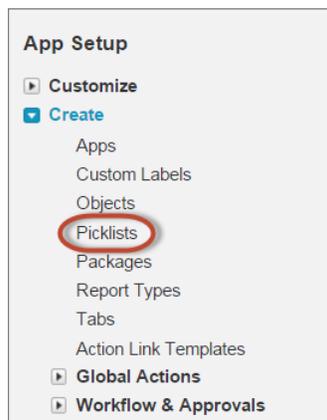
A global picklist is a restricted picklist by definition. When you create a global picklist, the list of values you specify is protected. Only you can add or edit values.

When you create a custom picklist field and base it on the global picklist, its list of values is inherited from the global picklist. Users can't change the values because they're defined as a picklist value set. They also can't add values through the API to the picklist value set or to picklist fields that use it.

Convenient Creation and Maintenance

Create a global picklist from the Setup tree. Then create custom picklist fields the way you always have. But now you have the option of using a global picklist value set for as many custom picklists as you want.

New Picklists Node in Setup



Specify the picklist value set when you create a global picklist. If you edit the global picklist definition, all of the picklist fields that use its picklist value set are also updated.

Say you want a picklist field called "Rating" on Accounts and Opportunities, with values Hot, Warm, and Cool. Instead of maintaining those picklist values separately on two different objects, create one global picklist with your value set. Then create a picklist field on each object, and set those picklists to inherit the global picklist value set. Each picklist automatically has the values Hot, Warm, and Cool.

Global Picklist Definition

Global Picklist Printable View | Help for this Page ?

[« Back to List](#)

[Picklist Value Set \[4\]](#) | [Inactive Picklist Values \[0\]](#) | [Fields Where Used \[2\]](#)

Global Picklist Detail

Label Device Type

Developer Name Device_Type

Description

[Edit](#) [Delete](#)

Picklist Value Set

[New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) ▼

Action	Values	Default	Chart Colors	Modified By
Edit Del Deactivate	External Drive	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Keyboard	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Monitor	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Optical Mouse	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM

Inactive Picklist Values

No Inactive Picklist Values values defined.

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Device_Type	Account	Picklist	
Device_Type Multiple	Account	Picklist (Multi-Select)	

Creating a Picklist Based on a Global Picklist

Account Help for this Page ?

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label ⓘ

Values

- Use global picklist definition
- Enter values for the picklist, with each value separated by a new line.

ⓘ

--None--

Territory

Device Type

alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Strictly enforce picklist values ⓘ

Field Name ⓘ

Description

Help Text

ⓘ

Known Limitations for Beta

- The list of inherited values doesn't appear directly on the detail page for a picklist that's based on a global picklist; but you can click a link to view the picklist value set.
 - For custom picklist fields based on a global picklist, you can change from a single-select to multi-select picklist, and from a multi-select to single-select picklist. However, you can't change the picklist to a different field type such as checkbox, currency, or text.
-  **Note:** This list of picklist limitations is not exhaustive. Features in pilot or beta status aren't guaranteed to be complete and fully functional until they become generally available.

Track Where Global Picklists Are Used More Easily

We simplified keeping track of your shared custom picklist values. Each global picklist's detail page shows where its picklist value set is used. This feature is available in Salesforce Classic only.

When you create a global picklist, the list of values you specify becomes its picklist value set. When you create custom picklist fields and base them on the global picklist, they inherit that picklist value set.

To see which picklist fields use a particular picklist value set, go to the Picklists node in Setup. Select the global picklist that has the value set you're interested in. The picklist fields that share the picklist value set appear under Fields Where Used.

View Which Fields Use a Picklist Value Set

Global Picklist Printable View | Help for this Page ?

[← Back to List](#)

[Picklist Value Set \(4\)](#) | [Inactive Picklist Values \(0\)](#) | [Fields Where Used \(2\)](#)

Global Picklist Detail Edit Delete

Information

Label	Device Type
Developer Name	Device_Type
Description	

Edit Delete

Picklist Value Set New Reorder Replace Printable View Chart Colors ▾

Action	Values	Default	Chart Colors	Modified By
Edit Del Deactivate	External Drive	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Keyboard	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Monitor	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Optical Mouse	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM

Inactive Picklist Values

No Inactive Picklist Values values defined.

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Device Type	Account	Picklist	
Device Type Multiple	Account	Picklist (Multi-Select)	

Eliminate Picklist Clutter with Restricted Picklists (Generally Available)

If you haven't tried restricted picklists yet, get ready to enjoy clutter-free picklists! This feature is now available in every org. A restricted picklist field enforces the integrity of picklist data by including only the values that you've defined. Your picklist data stays clean, because users can't add erroneous or redundant values. This feature is available in both Lightning Experience and Salesforce Classic.

You define the list of values for a picklist when you create the custom picklist field. To enable validation of picklist values against the defined list of values, select **Strictly enforce picklist values**. This setting prevents users from adding values through the API. If you don't select **Strictly enforce picklist values**, a picklist value that's not part of the picklist definition can be saved to a record via the API, reducing the cleanliness of your data.

Here's another reason to try restricted picklists: You can use them in custom metadata types. Custom metadata types are custom-defined types of application metadata that can be packaged and used along with an app. They save time by letting you define configurations and create reusable app components and features. Picklists on custom metadata types are always restricted, so enable restricted picklists to use custom metadata types.



Note: You can make a custom picklist field into a restricted picklist, but only if the picklist has fewer than 1000 values (or entries).

SEE ALSO:

[Salesforce Help: Custom Metadata Types](#)

Organize Restricted Picklists by Managing Inactive Values

Conveniently deactivate or reactivate values in restricted picklists to keep up with changing business needs without deleting values before you're ready. Now you can phase out a value from a restricted picklist without disrupting the existing records that use that picklist value. When you're sure you no longer need the value for future records, you can simply delete it. This streamlined procedure works for global picklists and all other custom restricted picklists. Global picklists are available in Salesforce Classic only. All other restricted picklists are available in both Salesforce Classic and Lightning Experience.

 **Note:** This release contains a beta version of global picklists that's production-quality but has known limitations.

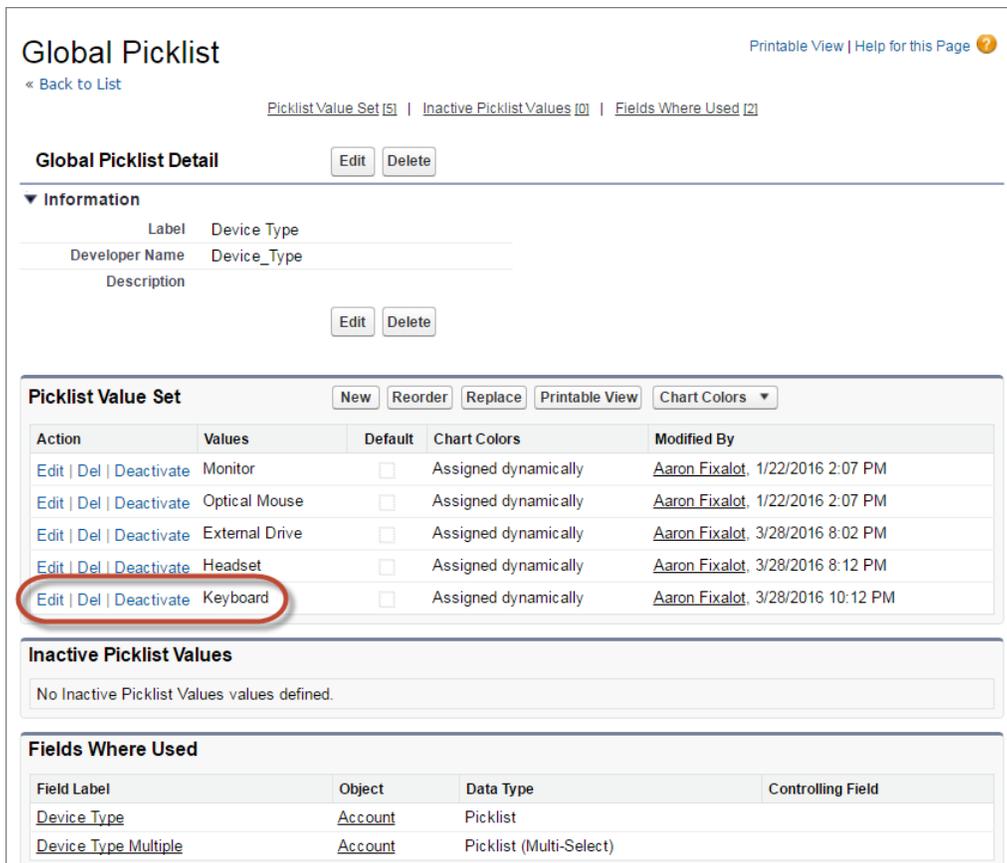
When you deactivate a value, it no longer appears in the picklist that users select from when creating or editing a record. But records that already had that value retain it.

Let's say you want to hide a picklist value so that users can no longer select it. First, navigate to the picklist definition.

- For a picklist on an object, go to the fields area of the object. For example, for an Account picklist: From Setup, enter *Account* in the **Quick Find** box, then select **Fields** under Accounts.
- For a global picklist: From Setup, enter *picklist* in the **Quick Find** box, then select **Picklists**.

Then go to the picklist's detail page. Remove the value from future use by clicking **Deactivate** next to its name.

Example: Deactivate a Global Picklist Value



Global Picklist Printable View | Help for this Page

[Back to List](#)

[Picklist Value Set \(5\)](#) | [Inactive Picklist Values \(0\)](#) | [Fields Where Used \(2\)](#)

Global Picklist Detail Edit Delete

Information

Label Device Type

Developer Name Device_Type

Description

Edit Delete

Picklist Value Set New Reorder Replace Printable View Chart Colors

Action	Values	Default	Chart Colors	Modified By
Edit Del Deactivate	Monitor	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Optical Mouse	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	External Drive	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 8:02 PM
Edit Del Deactivate	Headset	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 8:12 PM
Edit Del Deactivate	Keyboard	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 10:12 PM

Inactive Picklist Values

No Inactive Picklist Values values defined.

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Device Type	Account	Picklist	
Device Type Multiple	Account	Picklist (Multi-Select)	

The value moves to the Inactive Picklist Values section. If you decide later that you need the value, click **Activate** next to the value name.

Example: Inactive Global Picklist Value

Global Picklist [Printable View](#) | [Help for this Page](#)

[Back to List](#)

[Picklist Value Set \[4\]](#) | [Inactive Picklist Values \[1\]](#) | [Fields Where Used \[2\]](#)

Global Picklist Detail [Edit](#) [Delete](#)

Information

Label	Device Type
Developer Name	Device_Type
Description	

[Edit](#) [Delete](#)

Picklist Value Set [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#)

Action	Values	Default	Chart Colors	Modified By
Edit Del Deactivate	Monitor	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	Optical Mouse	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 1/22/2016 2:07 PM
Edit Del Deactivate	External Drive	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 8:02 PM
Edit Del Deactivate	Headset	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 8:12 PM

Inactive Picklist Values

Action	Values	Chart Colors	Modified By
Del Activate	Keyboard	Assigned dynamically	Aaron Fixalot , 3/28/2016 10:08 PM

Fields Where Used

Field Label	Object	Data Type	Controlling Field
Device_Type	Account	Picklist	
Device_Type Multiple	Account	Picklist (Multi-Select)	

Note: For unrestricted picklists, you can effectively deactivate values by clicking **Del** next to the value's name and then selecting **Keep old value for existing records**.

Remove a Picklist Field Value from Records

Don't need that old picklist value muddying your record data? Problem solved: There's now an easy way to remove a picklist value from all records in your org. This process works for standard and custom picklists (restricted or unrestricted). This feature is available in both Lightning Experience and Salesforce Classic.

From the Fields page of the object that uses the picklist, click the picklist name.

In the Picklist Value Set section, click **Del** next to the value you want to remove.

Locate the Picklist Value to Delete

Account Custom Field Help for this Page ?

Desirability

[Back to Account Fields](#)

[Validation Rules](#) [0]

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Desirability	Object Name	Account
Field Name	Desirability	Data Type	Picklist
API Name	Desirability__c		
Description			
Help Text			
Created By	Aaron Fixalot , 3/28/2016 3:50 PM	Modified By	Aaron Fixalot , 3/28/2016 3:50 PM

Picklist Options

Strictly enforce picklist values

Controlling Field [\[New\]](#)

Field Dependencies [New](#) [Field Dependencies Help](#) ?

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#) ?

No validation rules defined.

Picklist Value Set [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Picklist Value Set Help](#) ?

Action	Values	Default	Chart Colors	Modified By
Edit Del	High	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 3:50 PM
Edit Del	Medium	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 3:50 PM
Edit Del	Low	<input type="checkbox"/>	Assigned dynamically	Aaron Fixalot , 3/28/2016 3:50 PM

To remove the value completely from existing records, select **Replace value on records with blank value**. This option also removes the value from the picklist field that users see.

Replace with a Blank Value to Remove It from Records

Find and Replace Value Help for this Page ?

Desirability

Globally replace an existing value in a picklist with a new value. Choose a replacement value below to apply to any records that contain the deleted value. If you choose not to replace the value, the picklist no longer contains the deleted value but records containing that value still display it.

Delete value 'Low' from picklist and...

Replace value on records with High

Replace value on records with blank value

Keep old value for existing records

[Save](#) [Cancel](#)

Lightning Experience Setup

Get around Lightning Experience more easily with a couple of Setup navigation improvements. You can edit objects and see object details with fewer clicks. From the Object Manager, you can see all the custom record pages you've created for that object and which record page is active. This feature is available only in Lightning Experience.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Control Which Users Immediately Switch When Lightning Experience Is Enabled](#)

We heard you! Before enabling Lightning Experience, you need the power to decide who gets immediately switched to the new interface and who stays in Salesforce Classic. Now you can make these choices, with the new **Switch Users to Lightning Experience** option in the Lightning Experience Migration Assistant. This feature is available in both Lightning Experience and Salesforce Classic.

[Edit Objects Directly from the Setup Menu in Lightning Experience](#)

Now you can edit objects and see object details with fewer clicks. On object home and record pages, you can select Edit Object from the Setup menu to go directly to that object's detail page. This feature is available in Lightning Experience only.

[View Your Lightning Record Pages in the Object Manager](#)

We added a Lightning Record Pages related list to all objects that support record page editing in the Lightning App Builder. You can see all the custom record pages you've created for that object and which record page is active. This feature is available in Lightning Experience only.

[Search Lightning Experience Setup with Global Search](#)

Now you can use global search instead of Quick Find to find specific setup records, such as the Lead Source picklist or the Sales Rep profile. This feature is available in Lightning Experience only.

Control Which Users Immediately Switch When Lightning Experience Is Enabled

We heard you! Before enabling Lightning Experience, you need the power to decide who gets immediately switched to the new interface and who stays in Salesforce Classic. Now you can make these choices, with the new **Switch Users to Lightning Experience** option in the Lightning Experience Migration Assistant. This feature is available in both Lightning Experience and Salesforce Classic.

All standard profile users still get the "Lightning Experience User" permission when you enable Lightning Experience. But now you can flip the switch with confidence, knowing only the users you want will change interfaces right away. And everyone else can keep working in Salesforce Classic until they're ready to switch themselves.

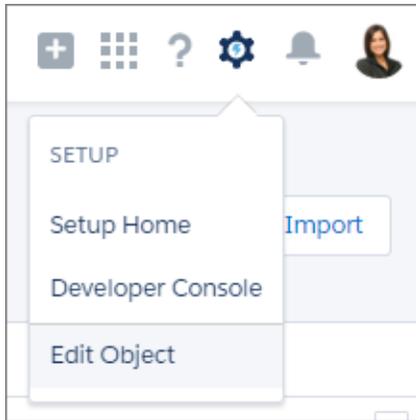
SEE ALSO:

[Welcome Your Users to Lightning Experience](#)

[Salesforce Help: Set Up Users for Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Edit Objects Directly from the Setup Menu in Lightning Experience

Now you can edit objects and see object details with fewer clicks. On object home and record pages, you can select Edit Object from the Setup menu to go directly to that object's detail page. This feature is available in Lightning Experience only.



The Edit Object menu option is available only for objects that are listed in the Object Manager in Lightning Experience.

SEE ALSO:

[Lightning Experience Features in This Release](#)

View Your Lightning Record Pages in the Object Manager

We added a Lightning Record Pages related list to all objects that support record page editing in the Lightning App Builder. You can see all the custom record pages you've created for that object and which record page is active. This feature is available in Lightning Experience only.

SEE ALSO:

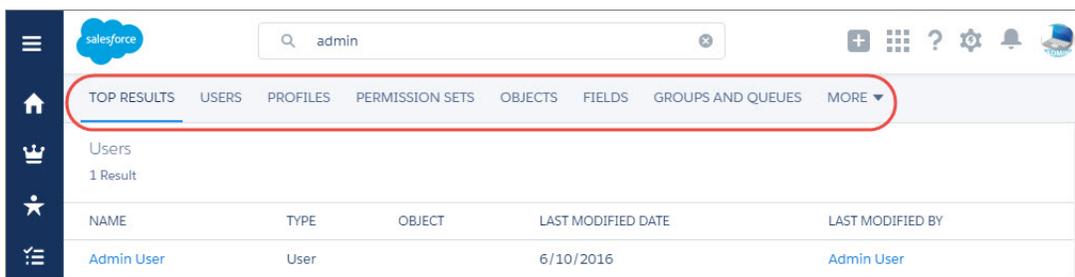
[Create and Edit Lightning Experience Record Pages \(Generally Available\)](#)

[Lightning Experience Features in This Release](#)

Search Lightning Experience Setup with Global Search

Now you can use global search instead of Quick Find to find specific setup records, such as the Lead Source picklist or the Sales Rep profile. This feature is available in Lightning Experience only.

While in Setup, enter the name of the setup record into global search. For example, you want to find Admin User quickly without browsing through Users so that you can reset the password. On the search results page, use the search scope bar beneath global search to see results only for a specific Setup object.



Top Results includes results from the Setup objects you use most frequently, so it's a good place to start. If you don't see a Setup object, use the More drop-down to the right of the list.

Setup search has a few restrictions.

- You can't search all Setup objects.
- You can only search by the name of the setup record.
- You can't customize which setup record appears in the search scope bar beneath global search.
- You can't customize the search layout.
- You can't sort or filter results.
- You must be in Setup to see Setup search results from global search.

Data Import

We're retiring the legacy data import tools, so start using the Data Import Wizard. We're making incremental improvements to help with the transition.

IN THIS SECTION:

[Legacy Data Import Tools to Retire in February 2017](#)

If you still use the individual import wizards for accounts, contacts, leads, person accounts, solutions, and custom objects, start using the Data Import Wizard instead. In Spring '17, these import tools will no longer be available. This feature is available in Salesforce Classic only.

[Data Import Wizard Enhancements for Matching by External ID](#)

For any object, you can specify an external ID field for the Data Import Wizard to find existing records that match the import data. If your import is adding only new records, the Data Import Wizard ignores the import file rows that contain matching values for the external ID field. If your import is updating existing records, the Data Import Wizard uses the import file's data to update the matching records in Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

[Data Import Wizard Enhancements for Email Notifications](#)

When you import data via the Data Import Wizard, the CSV file that you submit is queued for processing. When the import is complete, we notify you by email. We've expanded the email subject to include the CSV filename and the number of record rows it contains. Now you can quickly tell which import the email is about. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: Available in: **All** editions except **Database.com**

Your edition determines the types of objects you can import.

Legacy Data Import Tools to Retire in February 2017

If you still use the individual import wizards for accounts, contacts, leads, person accounts, solutions, and custom objects, start using the Data Import Wizard instead. In Spring '17, these import tools will no longer be available. This feature is available in Salesforce Classic only.

For now, you can still access the legacy data import tools from the Data Import Wizard page. From Setup, enter *Data Import Wizard* in the **Quick Find** box, then select **Data Import Wizard**. Then click **Legacy Data Import Tools**. We've added reminders throughout the legacy data import wizard pages that they will be unavailable in February 2017.

Use the legacy data import tools only when needed as your org transitions to the Data Import Wizard. You can suggest and vote on enhancements to the Data Import Wizard on the [IdeaExchange](#).

The Data Import Wizard behaves differently from the legacy data import tools, so confirm that your users have the required permissions and educate your users. For example, CSV files that work with the legacy data import tools don't always work with the Data Import Wizard. The Data Import Wizard sometimes requires more fields in the import file to ensure the data completeness of records in your

Salesforce org. Also, unlike some legacy data import tools, the Data Import Wizard can't import contacts, leads, and person accounts in the same import file.

SEE ALSO:

[Trailhead: Data Management](#)

[Video Playlist: Data Import How-To Series](#)

[Salesforce Help: Importing Records](#)

Data Import Wizard Enhancements for Matching by External ID

For any object, you can specify an external ID field for the Data Import Wizard to find existing records that match the import data. If your import is adding only new records, the Data Import Wizard ignores the import file rows that contain matching values for the external ID field. If your import is updating existing records, the Data Import Wizard uses the import file's data to update the matching records in Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

Previously, matching by external ID was available only when importing solutions or custom objects. Now the option is available regardless for which object you're importing records.

If the object has multiple external ID fields, you can now specify which field to match by. Previously, the Data Import Wizard made that decision for you.

The screenshot shows the 'Import your Data into Salesforce' wizard. On the left, under 'What kind of data are you importing?', 'Accounts and Contacts' is selected. On the right, under 'What do you want to do?', 'Add new records' is selected. The 'Match Account by:' dropdown menu is open, showing options: '--None--', '--None--', 'Salesforce.com ID', 'Account Name and Site', 'Master ID (External ID)', and 'Original ID (External ID)'. The last two options are circled in red. Below the dropdown, there is a checkbox for 'Trigger workflow rules and processes?' which is currently unchecked.

An external ID is a custom field that has the External ID attribute, meaning that it contains unique record identifiers from a system outside of Salesforce. When you select this option, the Data Import Wizard detects existing records in Salesforce with external IDs that match those in the import file. This operation is not case-sensitive. For example, "ABC" is matched with "abc". However, if the external ID field also has the case-sensitive Unique attribute, uppercase and lowercase letters aren't considered identical.

SEE ALSO:

[Salesforce Help: Importing Records](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Data Import Wizard Enhancements for Email Notifications

When you import data via the Data Import Wizard, the CSV file that you submit is queued for processing. When the import is complete, we notify you by email. We've expanded the email subject to include the CSV filename and the number of record rows it contains. Now you can quickly tell which import the email is about. This feature is available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Salesforce Help: Importing Records](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Visual Workflow

In addition to some generally available enhancements, like how we treat percentage values, we're rolling out two awesome pilots! One to add flows to any Lightning page, and another to build your own flow run time experience. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[Trust Percent Values in Flow sObject Variables Again \(Critical Update\)](#)

Have you added special calculations to your flow to get the right output for a percent field? This critical update lets you remove those workarounds.

[Access Cross-Object Owner Fields in Flow](#)

Some fields have relationships to more than one object. We call these relationships *polymorphic*. For example, if you have queues enabled for cases, a case owner can be either a user or queue. If you're traversing from a case to its owner ID, add special syntax to identify which object you mean when you say "Owner".

[Give Your Lightning Experience and Salesforce1 Users the Power of Flows \(Pilot\)](#)

The day is finally here! We're rolling out a flow component for the Lightning App Builder. You can now add flows to any Lightning page—App pages, Record pages, and Home pages alike.

[Customize the Look and Feel of Flow Interviews \(Pilot\)](#)

This release, we're piloting new REST API resources that give you full access to flows and their interviews. Use the REST API to customize the flow run-time experience to your heart's desire.

Trust Percent Values in Flow sObject Variables Again (Critical Update)

Have you added special calculations to your flow to get the right output for a percent field? This critical update lets you remove those workarounds.

Previously, our calculations on percent values weren't always working as expected. We rolled out a partial fix last release. This release we're rolling out the rest of the fix as a critical update. Why? We know that many of you have workarounds in place to make sure the flow calculates correctly. Because our change makes those workarounds unnecessary, here's your chance to test how the current state of percent calculations works for your flows.

Here's how you can expect percent values to behave after you activate this critical update.

When you...	The value...	Example
Pass a numerical value into an sObject variable's percent field	Doesn't change	100 remains 100. When you save this value to a new or existing record, the percent value is 100%.
Pass the value of one sObject variable's percent field into the percent field of another sObject variable	Doesn't change	100 remains 100. When you save this value to a new or existing record, the percent value is 100%.
Reference an sObject variable's percent field into a formula ¹	Divides by 100	100 becomes 1. When you save this value to a new or existing record, the percent value is 1% .

¹If you're saving this value to a new or existing Salesforce record, we recommend multiplying it by 100. As always, test various permutations of your flow to make sure that the calculations are working correctly.

Test This Critical Update

We recommend testing the critical update in a sandbox. If you must work in your production org, do so during off-peak hours.

1. Identify the flows that deal with percent fields in sObject variables.
2. Activate this critical update.
3. In your flows, identify any workarounds that you added to control how percent values were being calculated and adjust them for the new behavior. The recommended workaround was to multiply the sObject percent field values by 100.
4. Test each flow to make sure that the results with the critical update are correct.

Access Cross-Object Owner Fields in Flow

Some fields have relationships to more than one object. We call these relationships *polymorphic*. For example, if you have queues enabled for cases, a case owner can be either a user or queue. If you're traversing from a case to its owner ID, add special syntax to identify which object you mean when you say "Owner".

To reference a field on a related record, use this syntax.

```
{!sObjectVariable.polymorphicObjectName1:specificObjectName2.fieldName}
```

where:

- *sObjectVariable* is the unique name for the sObject variable that you want to start from.
- *polymorphicObject* is the API name for a polymorphic relationship for *sObjectVariable*'s object type.
- *specificObjectName* is the API name for the object that you want to select from the polymorphic relationship.
- *fieldName* is the name for the field that you want to reference on the last object in the expression. All custom field API names end in `__c`.

Supported Relationships

Not every relationship is polymorphic, so we recommend using the polymorphic syntax only when you know that the field can link to multiple objects. The following relationships are supported.

- `Case.Source`
- `FeedItem.CreatedBy`
- `Object.Owner`

Where `Object` lets you set Owner to either a user or a queue. `Group.Owner` and `Queue.Owner` aren't supported.

-  **Example:** `{!sObj_Case.Owner:User.Id}` references the ID of the user who owns the case, while `{!sObj_Case.Owner:Queue.Id}` references the ID of the queue who owns the case. You can always add the polymorphic reference after several traversals (`{!sObj_Case.Account.Owner:User.Id}`) or in the middle of a reference (`{!sObj_Case.Owner:User.Manager.Id}`).

Give Your Lightning Experience and Salesforce1 Users the Power of Flows (Pilot)

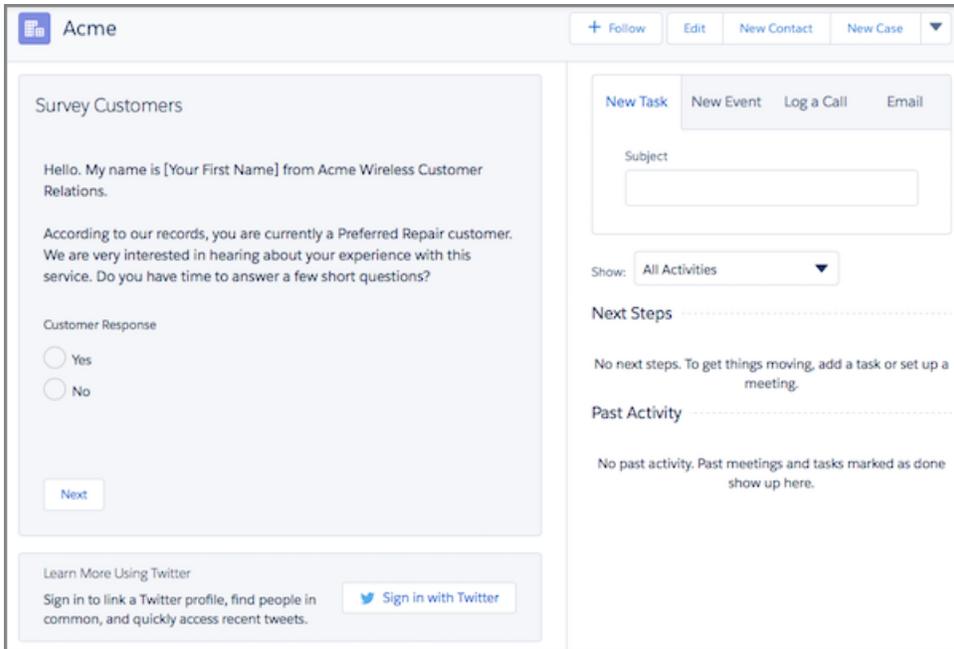
The day is finally here! We're rolling out a flow component for the Lightning App Builder. You can now add flows to any Lightning page—App pages, Record pages, and Home pages alike.

-  **Note:** We provide the Flow Lightning Component to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. The Flow Lightning Component isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for the Flow Lightning Component in the [IdeaExchange](#).

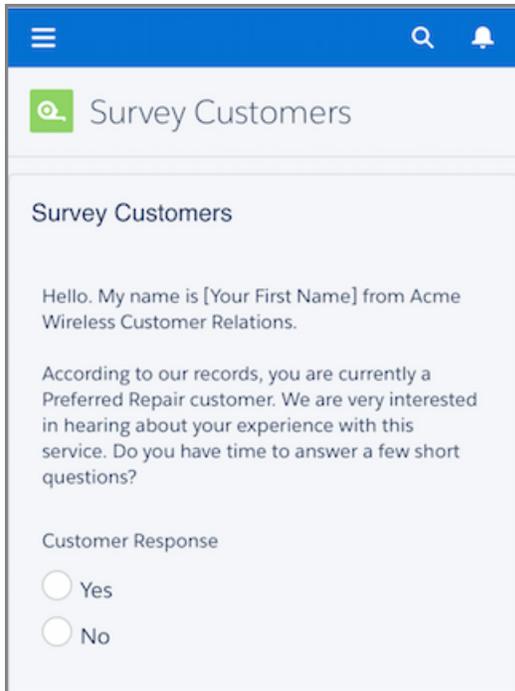
When you're in the pilot, you can add the flow component to your Lightning pages just like any other component.

Your flow might need the ID of the record that it's operating on, but don't worry! Record pages send the ID to your flow automatically if you have the correct Text input variable configured.

-  **Example:** Here's how a flow called Survey Customers appears when embedded in a Record page in Lightning Experience and an App page in Salesforce1.



The screenshot shows a Salesforce Lightning Experience record page for a contact named 'Acme'. The page features a 'Survey Customers' flow component on the left, which displays a personalized message: 'Hello. My name is [Your First Name] from Acme Wireless Customer Relations. According to our records, you are currently a Preferred Repair customer. We are very interested in hearing about your experience with this service. Do you have time to answer a few short questions?'. Below the message is a 'Customer Response' section with radio buttons for 'Yes' and 'No', and a 'Next' button. At the bottom of the flow, there is a 'Learn More Using Twitter' section with a 'Sign in with Twitter' button. The right sidebar contains standard Salesforce record page actions: '+ Follow', 'Edit', 'New Contact', and 'New Case'. Below these are tabs for 'New Task', 'New Event', 'Log a Call', and 'Email'. A 'Subject' input field is present. A 'Show:' dropdown menu is set to 'All Activities'. The 'Next Steps' section displays 'No next steps. To get things moving, add a task or set up a meeting.' The 'Past Activity' section displays 'No past activity. Past meetings and tasks marked as done show up here.'



Customize the Look and Feel of Flow Interviews (Pilot)

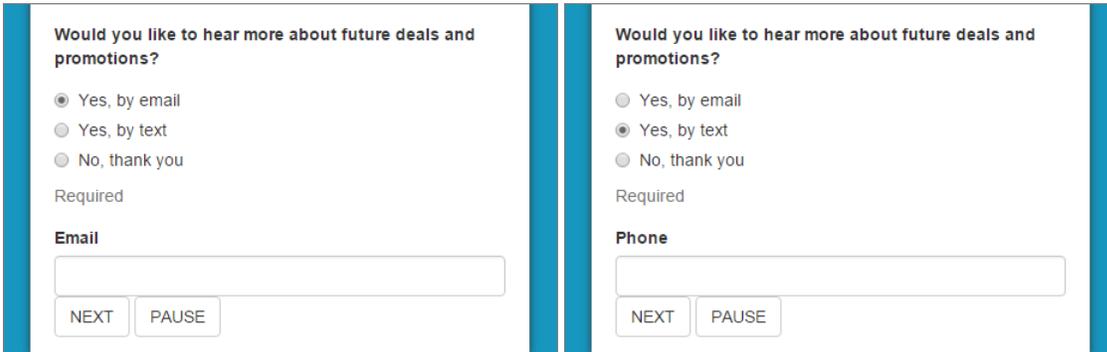
This release, we're piloting new REST API resources that give you full access to flows and their interviews. Use the REST API to customize the flow run-time experience to your heart's desire.

 **Note:** The Flow REST API is currently available to select customers through a pilot program. To be nominated to join this pilot program, contact Salesforce. Additional terms and conditions may apply to participate in the pilot program. Note that pilot programs are subject to change, and as such, we cannot guarantee acceptance into this pilot program or a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Here are a handful of things you can accomplish with this API.

- Apply your company's branding
- Create two-column layouts
- Create choice buttons—instead of requiring users to select a choice and click **Next**
- Render dynamic screens

 **Example:** In this dynamic screen, the second field changes based on the answer to the first field. If you select **Yes, by email**, the second field prompts you for your email address. If you select **Yes, by text**, the second field prompts you for your phone number instead.



SEE ALSO:

[New Resources: Flows and Flow Interviews \(Pilot\)](#)

External Data

Previously called Lightning Connect, Salesforce Connect expands your options for interacting with data that's stored outside your Salesforce org. We've made improvements to external object searches and the user interface.

IN THIS SECTION:

[You Say Potato, I Say Salesforce Connect](#)

Lightning Connect is now called Salesforce Connect, and the Salesforce adapter is now called the cross-org adapter. While we were updating the user interface to reflect the new names, we also did some text housecleaning. This feature is available in both Lightning Experience and Salesforce Classic.

[Control Whether an External Object Is Searchable](#)

Now you can decide whether to let users find an external object's records via SOSL and Salesforce global searches. For each external object, select or deselect the new **Allow Search** option. To make searches faster across your org, disable search for external objects that your users don't need to search. This feature is available in both Lightning Experience and Salesforce Classic.

[Have Your Hyphens and Search Them Too](#)

Hyphens are no longer removed from search query strings that Salesforce Connect OData adapters send to external systems. Now your users who search Salesforce for strings that include hyphens can find more relevant external object records. If you've set up your external system to handle the absence of hyphens in search query strings, make sure that including hyphens doesn't break your searches. This feature is available in both Lightning Experience and Salesforce Classic.

[Separately Load Related Lists with Fewer Clicks](#)

Back in Winter '16, we added a user interface setting to separately load related lists of external objects. To spare you from extra clicks, we've added common-sense dependencies between that setting and the one for separately loading related lists of standard and custom objects. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Salesforce Connect is available in: **Developer** Edition and for an extra cost in: **Enterprise, Performance, and Unlimited** Editions

Files Connect for cloud-based external data sources is available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Files Connect for on-premises external data sources is available for an extra cost in: **Enterprise, Performance, Unlimited, and Developer** Editions

You Say Potato, I Say Salesforce Connect

Lightning Connect is now called Salesforce Connect, and the Salesforce adapter is now called the cross-org adapter. While we were updating the user interface to reflect the new names, we also did some text housecleaning. This feature is available in both Lightning Experience and Salesforce Classic.

Most of the text improvements we made were to field-level help and error messages that we hope you never see. But perhaps you'll notice our changes to these three fields on External Data Source pages in Setup.

- **Allow Create, Edit, and Delete**—This option is now **Writable External Objects**.
- **Include in Salesforce Searches**—This option is now **Enable Search**.
- **Special Compatibility**—The value **Default** is now **None**.

EDITIONS

Available in: **Developer Edition**

Available for an extra cost in: **Enterprise, Performance, and Unlimited Editions**

The screenshot shows the 'External Data Source Edit: External Payroll' page. At the top, there are buttons for 'Save', 'Save and New', and 'Cancel'. Below that, the 'External Data Source' is set to 'External Payroll' and the 'Name' is 'external_payroll'. The 'Type' is 'Salesforce Connect' (highlighted with a red circle). Under the 'Parameters' section, the 'URL' is 'https://services.example.org/Payroll.svc', 'Connection Timeout (Seconds)' is '120', and 'Writable External Objects' is checked (highlighted with a red circle). Other options include 'High Data Volume', 'Server Driven Pagination', 'Request Row Counts', 'Compress Requests', 'Enable Search' (checked, highlighted with a red circle), 'Custom Query Option for Salesforce Search', 'Format' set to 'AtomPub', and 'Special Compatibility' set to 'None' (highlighted with a red circle). The 'Authentication' section is partially visible at the bottom.

SEE ALSO:

[Salesforce Help: Define External Data Sources](#)

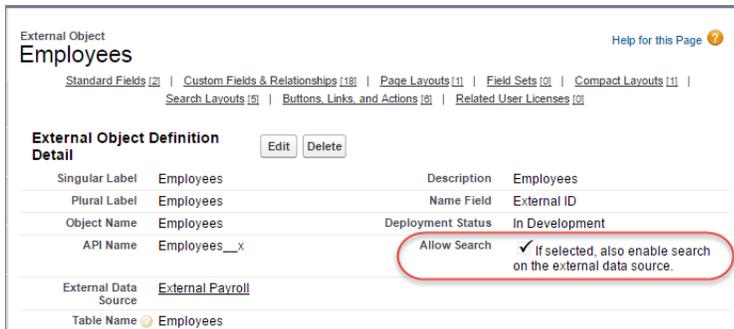
[Lightning Experience: A Modern and Intelligent User Experience](#)

Control Whether an External Object Is Searchable

Now you can decide whether to let users find an external object's records via SOSL and Salesforce global searches. For each external object, select or deselect the new **Allow Search** option. To make searches faster across your org, disable search for external objects that your users don't need to search. This feature is available in both Lightning Experience and Salesforce Classic.

By default, search is disabled for new external objects. However, you can validate and sync an external data source to automatically create external objects. Syncing always enables search on the external object when search is enabled on the external data source, and vice versa.

When Summer '16 becomes available in your org, Salesforce initially selects the `Allow Search` option for existing external objects. However, if search is disabled on the associated external data source, those external objects still aren't searchable. To include an external object in SOSL and Salesforce searches, enable search on both the external object and the external data source.



SEE ALSO:

[Salesforce Help: Define External Objects](#)

[Salesforce Help: Define External Data Sources](#)

[Salesforce Help: Guidelines for Making Search Faster](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Have Your Hyphens and Search Them Too

Hyphens are no longer removed from search query strings that Salesforce Connect OData adapters send to external systems. Now your users who search Salesforce for strings that include hyphens can find more relevant external object records. If you've set up your external system to handle the absence of hyphens in search query strings, make sure that including hyphens doesn't break your searches. This feature is available in both Lightning Experience and Salesforce Classic.

Previously, when SOSL and Salesforce searches included external objects, the OData adapters removed all ASCII punctuation characters before sending the search query string to external systems. It turns out that many of you have search-relevant hyphens in your data, so we changed our behavior.

EDITIONS

Salesforce Connect is available in: **Developer Edition** and for an extra cost in: **Enterprise, Performance, and Unlimited Editions**

SEE ALSO:

[Salesforce Help: Search Considerations for Salesforce Connect—OData 2.0 Adapter](#)

[Salesforce Help: Search Considerations for Salesforce Connect—OData 4.0 Adapter](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Separately Load Related Lists with Fewer Clicks

Back in Winter '16, we added a user interface setting to separately load related lists of external objects. To spare you from extra clicks, we've added common-sense dependencies between that setting and the one for separately loading related lists of standard and custom objects. This feature is available in both Lightning Experience and Salesforce Classic.

We added these dependencies.

If you do this...

Select Enable Separate Loading of Related Lists

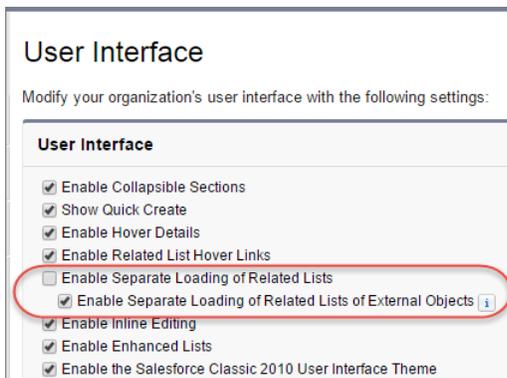
Deselect Enable Separate Loading of Related Lists of External Objects

We do this...

Select Enable Separate Loading of Related Lists of External Objects

Deselect Enable Separate Loading of Related Lists

To visually indicate the dependencies, we indented the setting that applies to external objects.



SEE ALSO:

[Salesforce Help: Customize User Interface Settings](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Other Changes in Customization

Enjoy greater flexibility with actions, control user access to sessions with permission sets, and get more details about users' access to records on the sharing detail page.

IN THIS SECTION:

[Salesforce Editions Optimized for Force.com](#)

Some Salesforce editions include more features than ever before. Some limits have been increased, too. Find out what's changed.

[Override a View Action with Both a Visualforce Page and a Lightning Page](#)

Previously, you couldn't have a Lightning Page action override and a Visualforce page or s-control action override set at the same time for the View action on an object. Instead, you had to remove one override before you could set the other. Now you can have your cake and eat it, too.

[\\$Action Global Variable Changes](#)

The Leads, Cases, and custom entity objects are not available for the `$Action` global variable's `ChangeOwner` value.

[Grant Access Based on Activated User Sessions](#)

You have all the power you need to manage user access to sessions without changing user profiles. Create a session-based permission set to grant access during an individual activated user session.

[Account Team and Opportunity Team Users Appear Separately on Sharing Pages](#)

A user on an account team or opportunity team appears separately on sharing pages in orgs that have account teams or opportunity teams enabled. This behavior occurs even if users have access to an account or opportunity because they're the record owner or own associated records.

[Make Sure Records That Are Submitted Behind the Scenes Are Routed to the Right Approval Process \(Critical Update\)](#)

When records are submitted for approval, Salesforce automatically makes sure that the record meets the entry criteria for the approval process. This critical update does the same for the submitting user when records are submitted behind the scenes by making sure that user is an allowed submitter.

[For Whom the Data Loads](#)

In the Data Loader for Windows installer, we clarified a step that was confusing. In that step, what you select determines who can use Data Loader and whether Data Loader can run automated processes on the machine. The Data Loader for Windows installer now explains the step so that you can make the correct choice. This feature is available in both Lightning Experience and Salesforce Classic.

[Field Detail Labels Updated in Profile Page](#)

If you don't use the Enhanced Profile User Interface, the field labels in profile view that indicate whether a field is editable have been updated. New field labels are `Read Access` and `Edit Access`. These new labels replace `Visible` and `Read-Only`.

[Visualforce Quick Actions Now Render Properly in Salesforce1 and Lightning Experience](#)

Visualforce pages called by quick actions now display correctly inside the action dialog box. The embedded Visualforce pages now fill the available space and render properly, with a scrollbar for content that exceeds the height of the action dialog box.

Salesforce Editions Optimized for Force.com

Some Salesforce editions include more features than ever before. Some limits have been increased, too. Find out what's changed.

See [Salesforce Editions Better Optimized to Meet Your Business Needs](#).

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Override a View Action with Both a Visualforce Page and a Lightning Page

Previously, you couldn't have a Lightning Page action override and a Visualforce page or s-control action override set at the same time for the View action on an object. Instead, you had to remove one override before you could set the other. Now you can have your cake and eat it, too.

You can have both a Visualforce or s-control override and a Lightning Page override set for the View action at the same time on the same object. In Lightning Experience, the Lightning Page override displays. In Salesforce Classic, the Visualforce or s-control override displays.

If you have the View action overridden with a Visualforce page in Salesforce Classic, the Setup menu on that object record page in Lightning Experience displays the Edit Page option. Selecting **Edit Page** in Lightning Experience on an object page that's overridden with a Visualforce page in Salesforce Classic lets you create a custom Lightning Experience record page for that object in the Lightning App Builder.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Visualforce overrides also available in: **Contact Manager**, **Group**, and **Professional** Editions

\$Action Global Variable Changes

The Leads, Cases, and custom entity objects are not available for the \$Action global variable's ChangeOwner value.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Contact Manager,** and **Developer** Editions

Grant Access Based on Activated User Sessions

You have all the power you need to manage user access to sessions without changing user profiles. Create a session-based permission set to grant access during an individual activated user session.

 **Note:** Session-based permission sets is currently available as a Developer Preview.

 **Important:** You can't install a managed package with a permission set that requires session activation on a customer org without this feature.

With a session-based permission set, you can grant access to certain features during a predefined session type. For example, let's say your org has a custom object called Conference Room. A mobile app called Conference Room Sync has read and update access to the object. Create a permission set to allow updates to the object only when the Conference Room Sync mobile app activates the user's session.

Or, let's say you have a web application that accesses confidential information. For security, you want to limit user access to certain types of sessions for a predetermined length of time. You can create a session-based permission set that activates only when users authenticate into your environment using a token. When the token expires, the user must reauthenticate to access the application again.

Once Session-based permission sets is enabled for your org, notice the Session Activation Required checkbox when you look at the Permission Set creation page. To activate a session-based permission set, get your coding skills on and check out the SessionPermSetActivation object in [New Objects](#) to learn more.

EDITIONS

Available in: **Developer** Edition

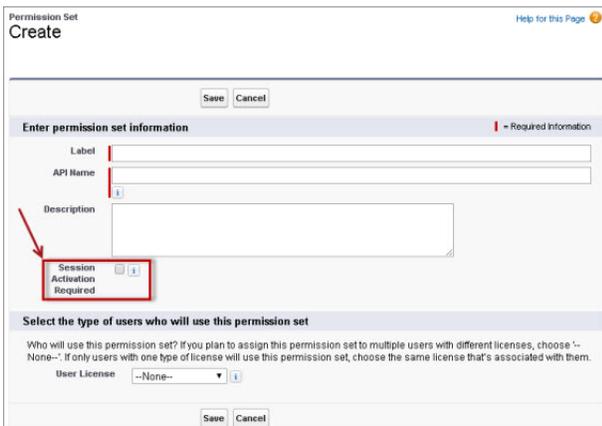
USER PERMISSIONS

To add or remove activation records for session-based permission sets:

- "Manage Session Permission Set Activation"

To use the Salesforce API:

- "API Enabled"



The screenshot shows the 'Create' page for a Permission Set in Salesforce. The page has a 'Help for this Page' link in the top right. Below the title, there are 'Save' and 'Cancel' buttons. The main section is titled 'Enter permission set information' and includes a red indicator for 'Required Information'. It contains fields for 'Label', 'API Name', and 'Description'. A red box highlights the 'Session Activation Required' checkbox, which is currently unchecked. Below this section is another section titled 'Select the type of users who will use this permission set', which includes a question about license assignment and a 'User License' dropdown menu set to '--None--'. 'Save' and 'Cancel' buttons are at the bottom.

After you create a session-based permission set and assign a user, you can see the assignment on the user's detail page. Notice that session-based permission set assignments appear in a different related list than other permission sets.

Action	Permission Set Label	Date Assigned
Del	IdentityConnectPSL	4/1/2016

Action	Permission Set Label	Date Assigned
Del	Exec Conference Rm Permission	4/1/2016

IN THIS SECTION:

[Filter Permission Set List View by Session Activation Criteria](#)

Easily see what types of permission sets you have by creating list views for your permission sets that require session activation.

Filter Permission Set List View by Session Activation Criteria

Easily see what types of permission sets you have by creating list views for your permission sets that require session activation.

You can set up a list view to filter by permission sets that require session activation.

Step 1. Enter View Name

View Name: Session-based permission sets

Created By: Admin User, 2/10/2016 10:59 AM

Last Modified By: Admin User, 4/1/2016 4:57 PM

Step 2. Specify Filter Criteria

Setting: Session Activation Required

Operator: equals

Value: True

This type of filter is useful if you have many permission sets in your org and you want to see which ones require session activation.

Account Team and Opportunity Team Users Appear Separately on Sharing Pages

A user on an account team or opportunity team appears separately on sharing pages in orgs that have account teams or opportunity teams enabled. This behavior occurs even if users have access to an account or opportunity because they're the record owner or own associated records.

If a user is a member of an account team or opportunity team, the user is listed separately on the Sharing Detail page and the Reasons for Access page.

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Sharing Detail
Acme

This page lists the users, groups, roles, and territories that have sharing access to Acme. Click **Expand List** to view all users who have access to it.

View: [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Type	Name ↑	Account Access	Opportunity Access	Case Access	Reason
Edit Del	User	Admin User	Read Only	Private	Private	Associated record owner or sharing
Edit Del	User	Nina Gupta	Read/Write	Private	Read Only	Account Team
Edit Del	User	Nina Gupta	Read Only	Private	Private	Associated record owner or sharing
Edit	User	Noah Larkin	Full Access	Private	Private	Owner

To view the Sharing Detail page, open the account or opportunity record and click **Sharing**. To view the Reasons for Access page, from the Sharing Detail page, click **Expand List** and then click the **Why** link next to the user.

Previously, if a user had access to an account or opportunity for one or more of the following reasons, the user appeared only once in the sharing pages with the highest level of access.

- On the account team or opportunity team
- Account or opportunity owner
- Owned or had access to associated records
- Had explicit sharing access to the account or opportunity

Make Sure Records That Are Submitted Behind the Scenes Are Routed to the Right Approval Process (Critical Update)

When records are submitted for approval, Salesforce automatically makes sure that the record meets the entry criteria for the approval process. This critical update does the same for the submitting user when records are submitted behind the scenes by making sure that user is an allowed submitter.

When a user clicks the **Submit for Approval** button on a record, Salesforce picks the first approval process where:

- The record meets the entry criteria, and
- The user submitting is an allowed submitter

Previously, when you submitted a record behind the scenes—whether with a line of code, the Process Builder, or a flow—Salesforce picked the first approval process where the record met the entry criteria. It didn't check whether the user submitting the record (or the user supplied via `submitterId`) was an allowed submitter. That changes with this critical update.

When you activate this critical update and a customization (such as an Apex class or a process) submits a record for approval, Salesforce picks the first approval process where the record meets the entry criteria and the submitter ID is an allowed submitter.

To test this critical update against your orgs customizations:

1. Review any customizations you have implemented that submit records for approval behind the scenes.
 - Processes

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Flows
 - Apex classes
 - API calls
2. Note whether each customization sets the submitter ID. If it doesn't, it assumes the current user as the submitter.
 3. For each approval process that the customization can invoke, update the list of allowed submitters to include whichever users' ID could be used to submit the record.
 4. Activate the critical update, and make sure that they submit records to the appropriate approval process by testing your customizations.

For Whom the Data Loads

In the Data Loader for Windows installer, we clarified a step that was confusing. In that step, what you select determines who can use Data Loader and whether Data Loader can run automated processes on the machine. The Data Loader for Windows installer now explains the step so that you can make the correct choice. This feature is available in both Lightning Experience and Salesforce Classic.

When installing version 37.0 of Data Loader for Windows, you're no longer asked whether to install it for yourself or for all users of the machine. Instead, you're asked whether you have administrator rights on the machine.

When in doubt, select **No**. Doing so installs all files in folders that you can access without administrator rights on the machine, such as `C:\Users\username\AppData`.

If you select **Yes**:

- Key files are installed in shared folders that only users with administrator rights can access.
- Data Loader works only for users with administrator rights on the machine.
- Data Loader can be run as part of your automation or scheduled processes.

SEE ALSO:

[Data Loader Guide](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Field Detail Labels Updated in Profile Page

If you don't use the Enhanced Profile User Interface, the field labels in profile view that indicate whether a field is editable have been updated. New field labels are `Read Access` and `Edit Access`. These new labels replace `Visible` and `Read-Only`.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

USER PERMISSIONS

To access the page to download Data Loader:

- "Modify All Data"

To use Data Loader:

- "API Enabled"

AND

The appropriate user permission for the operation, for example, "Create" on accounts to insert new accounts

AND

"Bulk API Hard Delete" (only if you configure Data Loader to use Bulk API to hard-delete records)

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Visualforce Quick Actions Now Render Properly in Salesforce1 and Lightning Experience

Visualforce pages called by quick actions now display correctly inside the action dialog box. The embedded Visualforce pages now fill the available space and render properly, with a scrollbar for content that exceeds the height of the action dialog box.

Security and Identity: More Security Measures, More Encryption Coverage, Easier Switching Between Orgs

We've improved two-factor authentication management, provided more security measures around identity verification, and now require the HTTPS protocol to log in. Encryption now supports Lightning Experience, protects more fields, and secures data in even more apps. Also, your users can easily switch between orgs with the user switcher.

IN THIS SECTION:

[Authentication and Identity](#)

You can rescue your users during two-factor authentication emergencies by giving them a temporary verification code. In Lightning Experience, a user with multiple usernames on the same Salesforce org or different orgs can easily switch between them with the user switcher.

[Shield Platform Encryption](#)

Your users now get all the benefits of Shield Platform Encryption in Lightning Experience, in Salesforce Classic, and on your mobile device with Salesforce1. Even more of your go-to apps support encrypted data, and you can encrypt custom fields in managed packages.

[Other Changes](#)

Review this section for more changes that impact security, including improvements to login security, the Health Check tool, and transaction security policies.

Authentication and Identity

You can rescue your users during two-factor authentication emergencies by giving them a temporary verification code. In Lightning Experience, a user with multiple usernames on the same Salesforce org or different orgs can easily switch between them with the user switcher.

IN THIS SECTION:

[Save the Day by Generating a Temporary Verification Code for Users in Distress](#)

Generate a temporary identity verification code for users who forgot, lost, or otherwise can't access the device they usually use for two-factor authentication. The user can log in and stay productive, and you don't have to weaken security for your Salesforce org or community by removing the two-factor authentication requirement. This feature is available in both Lightning Experience and Salesforce Classic.

[Delegate Two-Factor Authentication Management Tasks](#)

A new permission lets you delegate some two-factor authentication support tasks to users who aren't Salesforce admins. All users with the "Manage Users" permission also have the new permission, and you can't remove it from those users. This feature is available in both Lightning Experience and Salesforce Classic.

[Changed Name for “Manage Two-Factor Authentication” Permission](#)

For clarity, we’ve changed the name of the “Manage Two-Factor Authentication” permission to “Manage Two-Factor Authentication in API.” The name change distinguishes this permission from the new permission “Manage Two-Factor Authentication in User Interface.” This feature is available in both Lightning Experience and Salesforce Classic.

[Simplify Salesforce Navigation with the User Switcher](#)

With the user switcher, users can now easily navigate Salesforce when they have multiple usernames on the same or different Salesforce orgs. They select their profile picture to see a list of available usernames to navigate to. Users no longer have to open a new tab, enter a login URL, and then enter their username. Their browsers aren’t cluttered with several tabs, one for each Salesforce org. Now users can have a single tab for all Salesforce orgs. This feature is available in Lightning Experience only.

[Email Notifications to Users Confirm Added Verification Methods](#)

When an identity verification method is added to a user’s account, the user gets an email. The email notification increases security for your users’ accounts. This feature is available in both Lightning Experience and Salesforce Classic.

[See How Your Users Are Verifying Their Identity](#)

We’ve made it easier for you to secure your Salesforce org or community with two-factor authentication by adding tools that show you how your users are verifying their identity. With knowledge about who’s not using your preferred verification methods, you can refine your roll-out strategy and target communications to just the right people. This feature is available in both Lightning Experience and Salesforce Classic.

[Maintain Identity Verification on Public or Shared Devices](#)

Now when your users log in to Salesforce and verify their identity on a device that isn’t private, they can help keep your org secure by alerting us. Ask your users to deselect the “Don’t ask again” option that appears on the identity verification page when they’re using a shared device or browser. Deselecting this option keeps us asking for identity verification whenever anyone logs in from that browser and device. This feature is available in both Lightning Experience and Salesforce Classic.

[Implement Advanced Authentication for iOS Users of Custom Domains](#)

If you have a custom domain created with My Domain, you have a new option to support authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of Salesforce1 and Mobile SDK applications on iOS devices. When enabled, iOS users are redirected to their native browser when using single sign-on authentication into your custom domain. This feature is available in both Lightning Experience and Salesforce Classic.

[Improved Session Security for OAuth 1.0 Token Exchanges](#)

When a connected app requests access to Salesforce data via the user interface during an OAuth 1.0 token exchange, Salesforce validates the request and sends a short-lived session ID that is valid only for `frontdoor.jsp`. Previously, the session ID could be used in the API and was eligible for validity extensions. To disable this feature, contact Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

[New X_ReadOnlyMode Parameter in OAuth 2.0 Responses](#)

Users have read-only access to Salesforce during splits, instance migrations, instance switches, and other maintenance events. As an administrator, you can use the new `X_ReadOnlyMode` parameter to determine whether an access or refresh token is acquired while the org is in read-write mode or read-only mode. Access tokens obtained during read-only mode are used only for read operations. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app.

[Get More Specific Login Type Reporting in Login History](#)

When users use an authentication provider’s single sign-on (SSO) to access your Salesforce org through a customer service or partner portal, we provide more detailed entries in Login History. Previously, these login types were recorded as Customer Service Portal and Partner Portal, respectively. Now they’re recorded as Customer Service Portal Third-Party SSO and Partner Portal Third-Party SSO. This feature is available in both Lightning Experience and Salesforce Classic.

Endpoint Routing for User Interface Logins No Longer Supported

We're changing our endpoint routing to deliver better performance and higher availability for our dedicated user interface login endpoints. Previously, you could use `www.salesforce.com/login.jsp` as a user interface login endpoint, which then routed you to the correct login instance. As of June 25, 2016, we are removing internal routing, and you have to change your user interface login endpoints from `www.salesforce.com/login.jsp` to `https://login.salesforce.com/login.jsp`. This change applies only to user interface login traffic. Logging in from a browser by clicking **Login** still works. This feature is available in both Lightning Experience and Salesforce Classic.

Identity Verification Labels and Email Are Easier to Understand

To reflect recent enhancements to our identity verification procedures, we've changed some labels in the user interface and slightly revised an email your users get when verifying their identity. This feature is available in both Lightning Experience and Salesforce Classic.

Log In Even Faster with the Salesforce Authenticator App

Now you can approve tasks directly from your mobile phone notifications. No more drilling into the app to approve automated tasks. Apple Watch also syncs to the app more quickly so you don't have to wait for your codes to appear. Authenticate from your Apple Watch as easily as from other mobile devices, with less waiting for your codes to appear. Salesforce Authenticator works for Lightning Experience, Salesforce Classic, and the Salesforce mobile app.

Save the Day by Generating a Temporary Verification Code for Users in Distress

Generate a temporary identity verification code for users who forgot, lost, or otherwise can't access the device they usually use for two-factor authentication. The user can log in and stay productive, and you don't have to weaken security for your Salesforce org or community by removing the two-factor authentication requirement. This feature is available in both Lightning Experience and Salesforce Classic.

For Communities, set up this feature in the parent Salesforce org. Communities is only supported in Salesforce Classic.

For example, a user who gets a verification code from an app on a mobile phone leaves the phone at home one day. You give the user a temporary code that is valid for only eight hours. The next day, the user returns to work with the phone and gets a verification code from the mobile app as usual.

Important: If your org has implemented a two-factor authentication policy, temporary identity verification codes can be used to satisfy two-factor authentication requirements. Temporary codes cannot be used for device activations. That is, when users log in from an unrecognized browser or app and we require identity verification, they can't use a temporary code.

Salesforce admins and non-admin users with the "Manage Two-Factor Authentication in User Interface" permission can generate temporary verification codes. To get a code, go to the user's Advanced User Details page. Find Temporary Verification Code, and click **Generate**.



If you don't already have a session with high-assurance security, you must verify your identity before you can complete the code generation. Verifying your identity ensures that only authorized users can generate a temporary verification code.

When Salesforce displays the code, give it to your user right away. After you return to the user's detail page, you can't see the code again. The code can be used multiple times until it expires. It's valid only when entered in an identity verification screen that asks for a temporary verification code.

Note: When you add an identity verification method to a user's account by generating a temporary verification code, the user gets an email. To stop sending emails to users when identity verification methods are added to their accounts, contact Salesforce.

To remove a code before its expiration time, click **Expire Now** on the user's Advanced User Details page.

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Temporary Verification Code (Expires in 1 to 24 Hours)	Expires 3/24/2016 8:36 PM [Expire Now]
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SEE ALSO:

- [Delegate Two-Factor Authentication Management Tasks](#)
- [Salesforce Help: Two-Factor Authentication](#)
- [Salesforce Help: Modify Session Security Settings](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Delegate Two-Factor Authentication Management Tasks

A new permission lets you delegate some two-factor authentication support tasks to users who aren't Salesforce admins. All users with the "Manage Users" permission also have the new permission, and you can't remove it from those users. This feature is available in both Lightning Experience and Salesforce Classic.

Users with the "Manage Two-Factor Authentication in User Interface" permission can:

- Generate temporary verification codes for users who can't access the device they usually use for two-factor authentication.
- Disconnect identity verification methods from user accounts when a user loses or replaces a device.
- View user identity verification activity on the Identity Verification History page.
- View the Identity Verification Methods report by clicking a link on the Identity Verification History page.
- Create user list views that show which identity verification methods users have registered.

Some actions require users to first establish a session with high-assurance security, usually by completing two-factor authentication.

You can assign the new permission to users who don't have the "Manage Users" permission. For example, assign the permission to your company's internal support staff.

 **Example:** You assign the new permission to members of your company's Employee Help Desk. One of your users, Inder, calls the Help Desk on Friday to report that his company-issued mobile phone is broken. Inder usually completes two-factor authentication by responding to a push notification on his phone using the Salesforce Authenticator mobile app. Because his phone doesn't power up, he can't access the app. Kimi, a Help Desk staff member, checks Inder's employee badge to verify his identity and generates a temporary code for him. She sets the code to be valid for eight hours. Each time Inder logs in on Friday, he uses the code instead of responding to a Salesforce Authenticator push notification. He also submits his phone to the Help Desk for repairs.

On Monday, Kimi tells Inder that she has to issue him a new phone because his old one couldn't be fixed. Before she gives Inder the new phone, she navigates to his user detail page, finds App Registration: Salesforce Authenticator, and clicks **Disconnect**. Salesforce Authenticator also generates one-time passwords, so she clicks **Disconnect** next to App Registration: One-Time Password Generator. Now when Inder installs Salesforce Authenticator on his new phone, he can connect the app to his Salesforce account again. After connecting the app, he can use it for two-factor authentication, just like he did before his old phone broke.

SEE ALSO:

- [Save the Day by Generating a Temporary Verification Code for Users in Distress](#)
- [Salesforce Help: Two-Factor Authentication](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Changed Name for “Manage Two-Factor Authentication” Permission

For clarity, we’ve changed the name of the “Manage Two-Factor Authentication” permission to “Manage Two-Factor Authentication in API.” The name change distinguishes this permission from the new permission “Manage Two-Factor Authentication in User Interface.” This feature is available in both Lightning Experience and Salesforce Classic.

You can assign the “Manage Two-Factor Authentication in API” permission only to users who have the “Manage Users” permission. Users with “Manage Users” and “Manage Two-Factor Authentication in API” permissions also have the “Manage Two-Factor Authentication in User Interface” permission, which can’t be deleted.

Users with the permission can perform two-factor authentication tasks in the API by accessing, creating, or updating standard objects such as TwoFactorInfo.

SEE ALSO:

[Delegate Two-Factor Authentication Management Tasks](#)

[Salesforce Help: Two-Factor Authentication](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

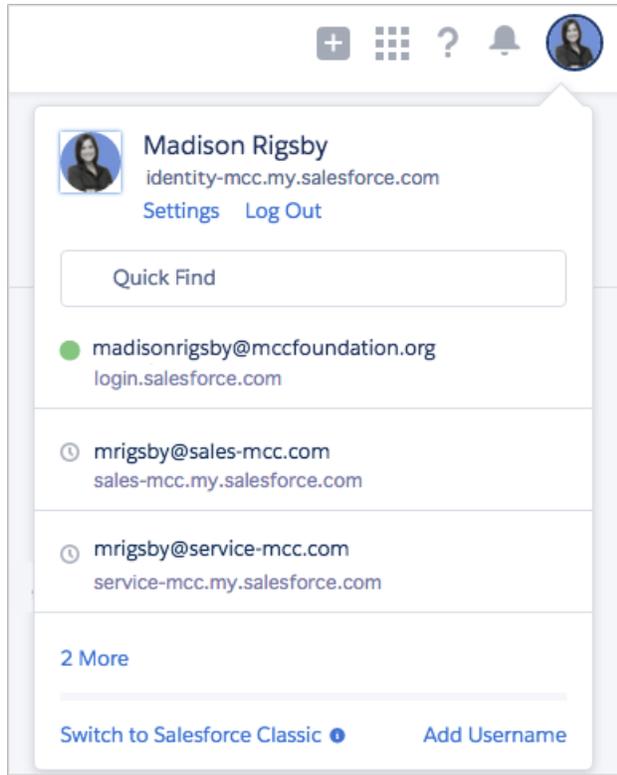
Simplify Salesforce Navigation with the User Switcher

With the user switcher, users can now easily navigate Salesforce when they have multiple usernames on the same or different Salesforce orgs. They select their profile picture to see a list of available usernames to navigate to. Users no longer have to open a new tab, enter a login URL, and then enter their username. Their browsers aren’t cluttered with several tabs, one for each Salesforce org. Now users can have a single tab for all Salesforce orgs. This feature is available in Lightning Experience only.

Don’t see a username you need? Click **Add Username** to add it to the list.

EDITIONS

Available in all editions



The user switcher is enabled by default. Admins can disable it to prevent the user switcher from displaying on the current org or to prevent an org from appearing in other user switchers. To disable the user switcher, from Setup, enter *Session Settings* in the Quick Find box, then select **Session Settings**.

SEE ALSO:

[Salesforce Help: Modify Session Security Settings](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Email Notifications to Users Confirm Added Verification Methods

When an identity verification method is added to a user's account, the user gets an email. The email notification increases security for your users' accounts. This feature is available in both Lightning Experience and Salesforce Classic.

For Communities, set up this feature in the parent Salesforce org. Communities is only supported in Salesforce Classic.

The subject line of the email sent to Salesforce users is "A new verification method was added to your Salesforce account." Community members get an email with the community name instead of Salesforce in the subject.

Users get the email in the following cases.

The user registers and verifies a mobile phone number.

Users can verify their identity by providing a code they receive in a text message sent to their mobile phone. Users register and verify a mobile phone number during login or in their personal settings.

EDITIONS

Available in all editions

The user connects the Salesforce Authenticator app.

Users can verify their identity by responding to a push notification sent to the Salesforce Authenticator app installed on their mobile device. Users connect the app during login, when accessing a restricted resource such as reports or connected apps, or on the Advanced User Detail page in their personal settings.

The user connects an authenticator app that generates a verification code.

Users can verify their identity by providing a code, also called a time-based one-time password (TOTP), generated by an app installed on their mobile device or desktop. Examples of authenticator apps are Salesforce Authenticator and Google Authenticator. Users connect the app during login, when accessing a restricted resource such as reports or connected apps, or on the Advanced User Detail page in their personal settings.

A Salesforce admin associates a TOTP secret with the user's account.

Admins with the "Manage Two-Factor Authentication in API" permission can write a value to the SharedKey field in the TwoFactorInfo object.

A Salesforce admin or a user with the "Manage Two-Factor Authentication in User Interface" permission generates a temporary verification code for the user.

Users can verify their identity with a temporary code when they can't access the device they usually use for two-factor authentication.

To stop sending emails to users when identity verification methods are added to their accounts, contact Salesforce.



Example: A hacker logs in to a user's account and adds an identity verification method that routes to the hacker's own mobile device. Salesforce sends a notification to the email address on the user's account. The user can then notify a Salesforce or community admin about the security breach.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

See How Your Users Are Verifying Their Identity

We've made it easier for you to secure your Salesforce org or community with two-factor authentication by adding tools that show you how your users are verifying their identity. With knowledge about who's not using your preferred verification methods, you can refine your roll-out strategy and target communications to just the right people. This feature is available in both Lightning Experience and Salesforce Classic.

For Communities, use this feature in the parent Salesforce org. Communities is only supported in Salesforce Classic.

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

IN THIS SECTION:

[View User Identity Verification Methods](#)

You can now see in a Users list view which verification methods users have registered for authentication. Depending on the field, you can make changes directly from the view, so you don't have to visit each user's detail page to perform these tasks.

[View and Customize Identity Verification Reports](#)

We've added a report that shows which identity verification methods your users have registered. You can also build custom reports to capture method registration patterns and identity verification history in your Salesforce org or community.

View User Identity Verification Methods

You can now see in a Users list view which verification methods users have registered for authentication. Depending on the field, you can make changes directly from the view, so you don't have to visit each user's detail page to perform these tasks.

The fields are available to Salesforce admins and to non-admin users with the “Manage Two-Factor Authentication in User Interface” permission.

To see registered identity verification methods in a Users list view, create or edit a view and add one or more of the new fields (1).

Has Verified Mobile Number

Indicates whether the user has verified a mobile phone number. Salesforce can text a verification code to the user at that number.

Has One-Time Password App

Indicates whether the user has connected an authenticator app that generates verification codes, also known as time-based one-time passwords. The user can verify identity by entering a code generated by the app.

Has Salesforce Authenticator

Indicates whether the user has connected the Salesforce Authenticator mobile app. The user can verify identity by approving a notification sent to the app.

Has Temporary Code

Indicates whether the user has a temporary verification code. Admins or non-admin users with the “Manage Two-Factor Authentication in User Interface” permission generate temporary codes and set when the code expires.

You can also perform some two-factor authentication support tasks right in the list view (2). For example, you can generate or expire a temporary verification code or disconnect a mobile authenticator app when the user loses access to the mobile device.

The screenshot shows the 'Identity Verification Methods' list view. At the top, there are instructions and a 'View:' dropdown set to 'Identity Verification Methods'. Below the instructions is a table with the following columns: Action, Full Name, Username, Role, Active, Has Verified Mobile Number, Has One-Time Password App, Has Salesforce Authenticator, and Has Temporary Code. The table contains two rows of user data. The first row is for 'Adams, Karen' and the second for 'Levin, Lalit'. In the 'Levin, Lalit' row, the 'Has One-Time Password App' column has a 'Disconnect' button, and the 'Has Temporary Code' column has a 'Generate' button. Two red boxes are overlaid on the image: box 1 is around the 'Has Verified Mobile Number' column header, and box 2 is around the 'Disconnect' and 'Generate' buttons in the second row.

Salesforce Classic users who can send mass emails can tailor recipient lists by filtering on the new fields.

Example: Create a list of users who haven't yet connected the Salesforce Authenticator mobile app to their account. Then, in Salesforce Classic, send them an email that explains how easy it is to connect the app. The email prepares your users for a rollout of two-factor authentication in your org or community.

SEE ALSO:

[Delegate Two-Factor Authentication Management Tasks](#)

[Save the Day by Generating a Temporary Verification Code for Users in Distress](#)

[Salesforce Help: Disconnect Salesforce Authenticator \(Version 2 or Later\) from a User's Account](#)

[Salesforce Help: Disconnect a User's One-Time Password Generator App](#)

[Salesforce Help: Send Mass Email in Salesforce Classic](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

View and Customize Identity Verification Reports

We've added a report that shows which identity verification methods your users have registered. You can also build custom reports to capture method registration patterns and identity verification history in your Salesforce org or community.

To view and customize the Identity Verification Methods report, users with the “Manage Two-Factor Authentication in User Interface” permission can click the link on the Identity Verification History page in Setup (1).

Identity Verification History Help for this Page

Filter and display up to 20,000 of the most recent identity verification records.

1

Location shows the approximate location of the user's IP address at the time of identity verification. To show more geographic information, such as approximate city and postal code, create a custom view to include those fields. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) may vary.

Want to see who's using Salesforce Authenticator and other identity verification methods? Go to the Identity Verification Methods report.

Users with the “View Setup and Configuration” permission can also access the report from the Administrative Reports folder in Reports.

Users with the “Manage Users” permission can create custom reports and dashboards for even deeper insight into identity verification history in your org or community. For example, create a report that shows identity verification method registration by profile (2) or a dashboard with charts that show method registration and verification challenges by the org policy that triggered them (3).

2

REPORT Two-factor Registration by Profile

Total Records: 13

Record Count

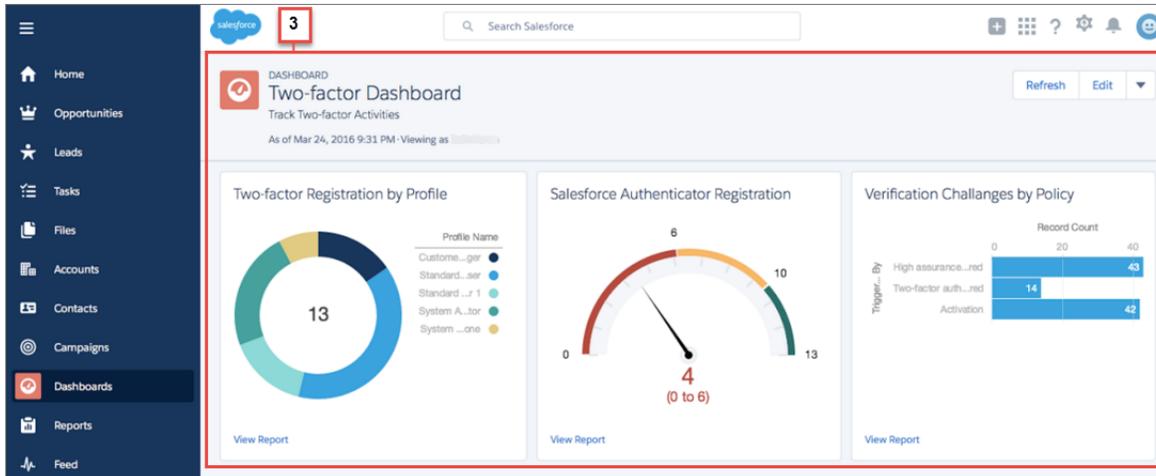
Profile Name

Profile Name: equals Standard

Standard

Done

PROFILE NAME ↑	USERNAME	HAS VERIFIED MOBILE NUMBER	HAS ONE-TIME PASSWORD APP	HAS SALESFORCE AUTHENTICATOR ↓	HAS TEMPORARY CODE
Customer Portal Manager (2 records)	commuser1@202.com	✓	✓	✓	×
	aok.28352533@social-sign-on.com	×	×	×	×
Standard User (5 records)	aok.56687166@social-sign-on.com	×	×	×	×
	stduser2@202.com	×	×	×	×



SEE ALSO:

[Delegate Two-Factor Authentication Management Tasks](#)

[Salesforce Help: Learn about Reports](#)

[Salesforce Help: Build a Report](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Maintain Identity Verification on Public or Shared Devices

Now when your users log in to Salesforce and verify their identity on a device that isn't private, they can help keep your org secure by alerting us. Ask your users to deselect the "Don't ask again" option that appears on the identity verification page when they're using a shared device or browser. Deselecting this option keeps us asking for identity verification whenever anyone logs in from that browser and device. This feature is available in both Lightning Experience and Salesforce Classic.

When users log in from a browser or app we haven't seen before and their login IP address is outside a trusted IP range, we ask them to verify their identity. The identity verification page that your users see includes an option not to be asked for identity verification again. The option is selected by default.

EDITIONS

Available in all editions

When users log in from a public or shared device, such as a terminal in a public library or Internet cafe, they can deselect the box. We then keep asking for identity verification on that browser and device.

SEE ALSO:

[Salesforce Help: Verify Your Identity](#)

[Salesforce Help: Activations](#)

[Salesforce Help: Use Activations](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Implement Advanced Authentication for iOS Users of Custom Domains

If you have a custom domain created with My Domain, you have a new option to support authentication methods, such as Kerberos, Windows NT LAN Manager (NTLM), or certificate-based authentication, for users of Salesforce1 and Mobile SDK applications on iOS devices. When enabled, iOS users are redirected to their native browser when using single sign-on authentication into your custom domain. This feature is available in both Lightning Experience and Salesforce Classic.

For other operating systems, Salesforce1 and applications using Mobile SDK version 3.1 or later can support certificate-based authentication when the applications are integrated with Mobile Device Management (MDM) software.

To enable advanced authentication, from Setup, enter *My Domain* in the Quick Find box, then select **My Domain**. Under Advanced Authentication, click **Edit**, and then enable **Use the native browser for user authentication on iOS**.

EDITIONS

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Improved Session Security for OAuth 1.0 Token Exchanges

When a connected app requests access to Salesforce data via the user interface during an OAuth 1.0 token exchange, Salesforce validates the request and sends a short-lived session ID that is valid only for `frontdoor.jsp`. Previously, the session ID could be used in the API and was eligible for validity extensions. To disable this feature, contact Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

To obtain a session ID that can be used directly, use the API access token exchange.

SEE ALSO:

[Salesforce Help: OAuth 1.0.A Authentication Flow](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

New `X_ReadOnlyMode` Parameter in OAuth 2.0 Responses

Users have read-only access to Salesforce during splits, instance migrations, instance switches, and other maintenance events. As an administrator, you can use the new `X_ReadOnlyMode` parameter to determine whether an access or refresh token is acquired while the org is in read-write mode or read-only mode. Access tokens obtained during read-only mode are used only for read operations. This feature is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app.

To determine whether your org is in read-only mode during an OAuth flow, use the `X_ReadOnlyMode` parameter in the response. If the value is `true`, the org is in read-only mode. If the value is `false`, the org is in read-write mode.

During read-only mode:

- Existing access tokens expire.
- Existing refresh tokens can be used by clients to obtain read-only access tokens.
- Access and refresh tokens acquired during read-only mode expire when your organization exits read-only mode.

Use the http header `X_ReadOnlyMode` parameter to notify users when the Salesforce service is in read-only mode for planned maintenance. When your org is in read-only mode, desktop and Salesforce1 mobile browser app users see a "Maintenance in Progress" banner.

Get More Specific Login Type Reporting in Login History

When users use an authentication provider's single sign-on (SSO) to access your Salesforce org through a customer service or partner portal, we provide more detailed entries in Login History. Previously, these login types were recorded as Customer Service Portal and Partner Portal, respectively. Now they're recorded as Customer Service Portal Third-Party SSO and Partner Portal Third-Party SSO. This feature is available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

EDITIONS

Available in all editions

USER PERMISSIONS

To manage, create, edit, and delete OAuth applications:

- "Manage Connected Apps"

EDITIONS

Available in all editions

Endpoint Routing for User Interface Logins No Longer Supported

We're changing our endpoint routing to deliver better performance and higher availability for our dedicated user interface login endpoints. Previously, you could use `www.salesforce.com/login.jsp` as a user interface login endpoint, which then routed you to the correct login instance. As of June 25, 2016, we are removing internal routing, and you have to change your user interface login endpoints from `www.salesforce.com/login.jsp` to `https://login.salesforce.com/login.jsp`. This change applies only to user interface login traffic. Logging in from a browser by clicking **Login** still works. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in all editions

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Identity Verification Labels and Email Are Easier to Understand

To reflect recent enhancements to our identity verification procedures, we've changed some labels in the user interface and slightly revised an email your users get when verifying their identity. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in all editions

Personal Settings: Reset My Security Token

We clarified the text your users see when they reset their security token.

Setup: Manage Users

In Identity Verification History, "Device activation" in the Triggered By column has been changed to "Activation." In System Permissions, the "Email-Based Identity Confirmation Option" permission is now called "Email-Based Identity Verification Option." The descriptions of the "Two-Factor Authentication for User Interface Logins" and "Two-Factor Authentication for API Logins" permissions have been edited.

Setup: Security Controls

In Activations, the Activated Login IP section has been renamed Login IP. The paragraphs introducing that section and the Activated Client Browsers section have been edited. In Session Settings, the Identity Confirmation section has been renamed Identity Verification, and a couple of other references to "confirmation" have been changed to "verification." Also in Session Settings, Device Activation (in the Session Security Levels section) is now simply called Activation.

Identity Verification Email

We made slight revisions to a few sentences in the email that has the Subject line "Verify your identity in Salesforce."

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

Log In Even Faster with the Salesforce Authenticator App

Now you can approve tasks directly from your mobile phone notifications. No more drilling into the app to approve automated tasks. Apple Watch also syncs to the app more quickly so you don't have to wait for your codes to appear. Authenticate from your Apple Watch as easily as from other mobile devices, with less waiting for your codes to appear. Salesforce Authenticator works for Lightning Experience, Salesforce Classic, and the Salesforce mobile app.

Shield Platform Encryption

Your users now get all the benefits of Shield Platform Encryption in Lightning Experience, in Salesforce Classic, and on your mobile device with Salesforce1. Even more of your go-to apps support encrypted data, and you can encrypt custom fields in managed packages.

IN THIS SECTION:

[More Apps Work With Encrypted Data](#)

Shield Platform Encryption doesn't just support Lightning Experience now. We've made it possible to use encrypted data in a whole lot of your most valuable apps.

[Encrypt Custom Fields in Managed Packages](#)

When you install a managed package in your Salesforce org with Shield Platform Encryption, you can encrypt custom fields in the package. You can encrypt any field that belongs to one of the encryptable custom field types.

[Encrypt Custom Date Fields](#)

Sometimes it's important to protect potentially sensitive dates like birth dates or dates on patient health records. If you're using custom Date and Date/Time fields, you can now protect that data with Platform Encryption and an encryption key specific to your organization. This feature is available in both Lightning Experience and Salesforce Classic.

[Encrypt Knowledge Article Fields and Attachments](#)

Knowledge articles are a great way to share information with your customers and colleagues. Not only can you add fields encrypted with Platform Encryption to Knowledge articles, but now you can attach encrypted files to Knowledge articles. This feature is available in both Lightning Experience and Salesforce Classic.

[Sort Records in Reports and Dashboards by Encrypted Fields](#)

Keeping your Salesforce data secure doesn't mean you can't effectively report on it. Previously, if a field was encrypted, it couldn't be used to sort the records in a report or a dashboard. Now it can! This feature is available in both Lightning Experience and Salesforce Classic.

[Bring Your Own Encryption Keys \(Pilot\)](#)

You don't want Salesforce to generate key material for you? You have your own crypto libraries, enterprise key management system, or hardware security module (HSM)? Now you can bring your own keys (BYOK) to your Salesforce orgs for increased ownership of your data's security. This feature is available in both Lightning Experience and Salesforce Classic.

[Encrypt Your Search Index \(Pilot\)](#)

The index files that support search for your users can now be encrypted with your organization's encryption key.

More Apps Work With Encrypted Data

Shield Platform Encryption doesn't just support Lightning Experience now. We've made it possible to use encrypted data in a whole lot of your most valuable apps.

Health Cloud

You can use Shield Platform Encryption to protect sensitive health care information in Health Cloud. Health Cloud is an app for improving healthcare outcomes by supporting strong, collaborative patient-caregiver relationships.

Financial Services Cloud

Shield Platform Encryption protects data in the Financial Services Cloud app, our reimagined front office for financial service providers.

Salesforce for Outlook

Encryption works with Salesforce for Outlook if you give users the "View Encrypted Data" permission in profiles or via permission sets. Previously, you couldn't use Shield Platform Encryption if Salesforce for Outlook was running.

Marketing Cloud Connect

The latest version of Marketing Cloud Connect (formerly the Exact Target Salesforce Integration) now supports Shield Platform Encryption. See the [Marketing Cloud Connect documentation](#) for details.

Salesforce to Salesforce

Salesforce to Salesforce lets your users log into one organization and work with data in another connected org. When both orgs have Shield Platform Encryption enabled, data that's encrypted in the source org is encrypted in the target org too.

Organization Sync

Organization Sync builds on Salesforce to Salesforce to let you set up a secondary, synced Salesforce organization to use in case your primary organization has downtime. When both orgs have Shield Platform Encryption enabled, data that's encrypted on the primary org is also encrypted in the backup org. See [Organization Sync](#) for details.

Encrypt Custom Fields in Managed Packages

When you install a managed package in your Salesforce org with Shield Platform Encryption, you can encrypt custom fields in the package. You can encrypt any field that belongs to one of the encryptable custom field types.

As an admin, this may increase the range of packages you can leverage, because more packages will be encryption-ready out of the box. (Not all of them, though! Check with the app vendor that a package is compatible with encryption before you install it.)

 **Important:** Engage your app vendor to make sure they are prepared to support encrypted custom fields in their package. Then contact Salesforce support to enable this capability for your org.

If you're an app vendor, talk to Salesforce support about getting set up to support customers who encrypt custom fields used by your package.

SEE ALSO:

[Fields You Can Encrypt](#)

Encrypt Custom Date Fields

Sometimes it's important to protect potentially sensitive dates like birth dates or dates on patient health records. If you're using custom Date and Date/Time fields, you can now protect that data with Platform Encryption and an encryption key specific to your organization. This feature is available in both Lightning Experience and Salesforce Classic.

When you enable Shield Platform Encryption for your org, new data entered into custom date fields is secured at rest with your organization's encryption key. (You can also apply encryption to existing values in custom Date and Date/Time fields. Contact Salesforce support for help with that.)

SEE ALSO:

[Encrypt Custom Fields](#)

Encrypt Knowledge Article Fields and Attachments

Knowledge articles are a great way to share information with your customers and colleagues. Not only can you add fields encrypted with Platform Encryption to Knowledge articles, but now you can attach encrypted files to Knowledge articles. This feature is available in both Lightning Experience and Salesforce Classic.

To attach encrypted files, use an article type that includes a file field. You can then upload encrypted files as long as you have Platform Encryption enabled for files and attachments.

Sort Records in Reports and Dashboards by Encrypted Fields

Keeping your Salesforce data secure doesn't mean you can't effectively report on it. Previously, if a field was encrypted, it couldn't be used to sort the records in a report or a dashboard. Now it can! This feature is available in both Lightning Experience and Salesforce Classic.

 **Note:** This only works for reports and dashboards.

SEE ALSO:

[Sort Your Report Data](#)

Bring Your Own Encryption Keys (Pilot)

You don't want Salesforce to generate key material for you? You have your own crypto libraries, enterprise key management system, or hardware security module (HSM)? Now you can bring your own keys (BYOK) to your Salesforce orgs for increased ownership of your data's security. This feature is available in both Lightning Experience and Salesforce Classic.

You know the Salesforce promise: you own your data because we never access it. Bring Your Own Keys brings even more depth to that promise. This pilot lets you create tenant secrets outside of Salesforce using your own crypto libraries, enterprise key management system, or hardware security module. You grant Shield Platform Encryption's key management machinery access to these keys, which you can encrypt with a self-signed or certificate authority (CA) certificate's public key. You can revoke this access on demand via the Key Management tooling in Setup or programmatically via the API.

You're the expert on your company's security needs, and with Bring Your Own Keys you're in the driver's seat. Whatever your service resiliency or disaster recovery posture, we'll support you in providing the best security for your data.

 **Note:** The Bring Your Own Keys feature is available through a pilot program. For information about joining this pilot, contact your Salesforce account executive.

Encrypt Your Search Index (Pilot)

The index files that support search for your users can now be encrypted with your organization's encryption key.

When you search databases and file systems, the search engine breaks down your search term into smaller parts and looks for matches in the index. Now the files in this index are encrypted using an org-specific AES-256 bit encryption key. This allows us to extend Shield Platform Encryption-strength security to your org-specific search index files.

The beauty of this pilot lies in its effortlessness: there's nothing for admins to set up, and end users won't see anything different in the UI.

 **Note:** The encrypted search index feature is available through a pilot program. For information about joining this pilot, contact your Salesforce account executive.

Other Changes

Review this section for more changes that impact security, including improvements to login security, the Health Check tool, and transaction security policies.

IN THIS SECTION:

[Logging In to Salesforce Requires HTTPS](#)

Logging in to Salesforce now requires an HTTPS secure connection. Replace HTTP with HTTPS any time you call `login.salesforce.com`.

[Track TLS Protocol and Cipher Suite Data for User Logins](#)

Prepare for Salesforce's disablement of the TLS 1.0 encryption protocol by tracking which protocol and cipher suite your users use when they log in. When you create a Login History list view in Setup or run a report that includes login data, add the TLS Protocol and TLS Cipher Suite fields. In Login History, you can also download a CSV file that lists only those logins that used the TLS 1.0 protocol. This feature is available in both Lightning Experience and Salesforce Classic.

[New Orgs Require TLS 1.1 or Later](#)

Starting with this release, all new Salesforce orgs require TLS 1.1 or later for inbound connections to or outbound connections from the org. When you create a sandbox org, the org inherits the TLS requirements of your production org.

[Fix Risks in Login Access Policies and Remote Site Settings with Health Check](#)

Spot and close even more security gaps right from the Health Check page in Setup. In addition to password policies, session settings, and network access settings, you can now identify and fix security risks for login access policies and remote site settings. This feature is available in both Lightning Experience and Salesforce Classic.

[Easily Retrieve Security and Risk Data with the Health Check API](#)

Introducing Health Check API, which consists of two read-only Tooling API objects: `SecurityHealthCheck` and `SecurityHealthCheckRisks`. Make SOQL queries to retrieve your org's security settings, risks, Health Check score, and Salesforce baseline settings. You can add this information to your security monitoring systems and dashboards to verify that multiple Salesforce applications have the same security posture.

[Access to Security Health Check Limited to Administrators](#)

For security reasons, only users with both the "View Setup and Configuration" and "Modify All Data" user permissions can view and edit information on the Health Check page in Setup. Previously, all users could see the Health Check page. This feature is available in both Lightning Experience and Salesforce Classic.

[Transaction Security Standard Policies Expanded](#)

We've taken the Data Loader Lead Export policy and renamed it to Lead Data Export to reflect the policy's new capabilities. The policy now checks for excessive downloads from both the Salesforce app and the API. The new version also triggers if more than 2,000 records are downloaded or a download takes more than one second. Previously, both conditions had to be true to trigger the policy.

[Transaction Security Data Export Clarification](#)

A policy that uses the Data Export event type is triggered only when the export is done with a default report type from the Report tab or is performed with an API client like Data Loader or Workbench. The available object types for a Data Export policy are Account, Case, Contact, Lead, and Opportunity.

[DML Isn't Supported in Transaction Security Policies](#)

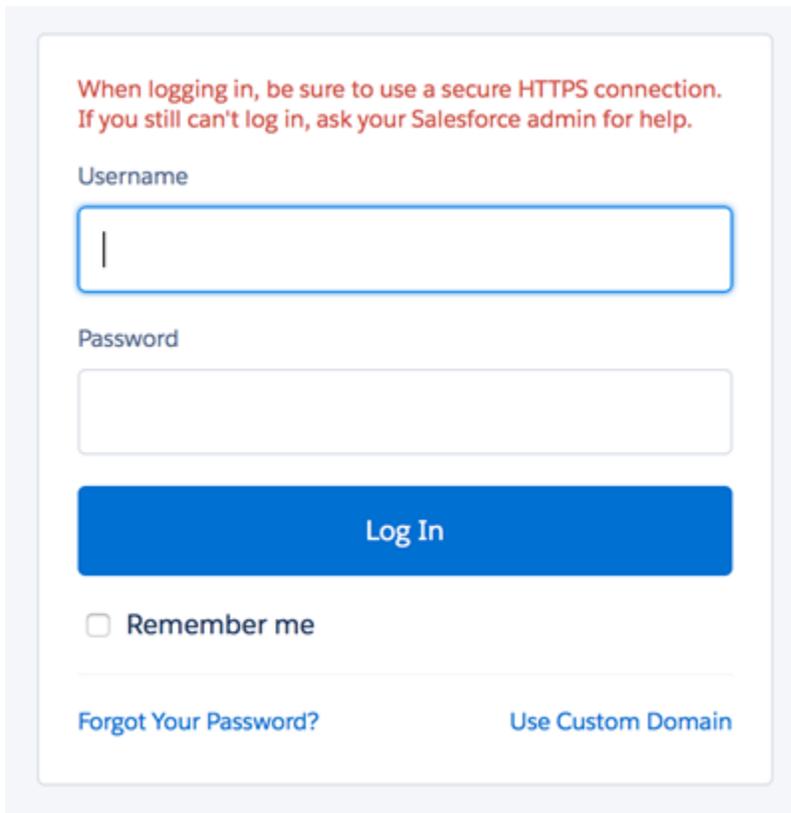
Don't include Data Manipulation Language (DML) statements in your custom policies. DML operations are rolled back after a transaction security policy is evaluated, regardless if the policy evaluates to `true` or `false`.

Logging In to Salesforce Requires HTTPS

Logging in to Salesforce now requires an HTTPS secure connection. Replace HTTP with HTTPS any time you call `login.salesforce.com`.

When you enter the `login.salesforce.com` URL in your browser, it already redirects to HTTPS. However, scenarios in which you pass the username and password to `http://login.salesforce.com` return an error.

You get this error if you try to log in over HTTP using a URL that contains a username and password in the query string. You can also see this error when you have HTML that posts to `http://login.salesforce.com` and passes a username and password.



When logging in, be sure to use a secure HTTPS connection.
If you still can't log in, ask your Salesforce admin for help.

Username

Password

Log In

Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

Track TLS Protocol and Cipher Suite Data for User Logins

Prepare for Salesforce's disablement of the TLS 1.0 encryption protocol by tracking which protocol and cipher suite your users use when they log in. When you create a Login History list view in Setup or run a report that includes login data, add the TLS Protocol and TLS Cipher Suite fields. In Login History, you can also download a CSV file that lists only those logins that used the TLS 1.0 protocol. This feature is available in both Lightning Experience and Salesforce Classic.

In views, reports, and downloadable CSV files, the TLS Protocol and TLS Cipher Suite fields are populated for Summer '16 logins and later. When your users download records of their own login history from their personal settings, the CSV file shows which TLS protocol and cipher suite they used. Users can't edit the list view to display the fields on their personal Login History page.

SEE ALSO:

[Knowledge Article: Salesforce disabling TLS 1.0](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

EDITIONS

Available in all editions

New Orgs Require TLS 1.1 or Later

Starting with this release, all new Salesforce orgs require TLS 1.1 or later for inbound connections to or outbound connections from the org. When you create a sandbox org, the org inherits the TLS requirements of your production org.

Contact Salesforce Support if you have a new org and require TLS 1.0.

SEE ALSO:

[Knowledge Article: Salesforce disabling TLS 1.0](#)

Fix Risks in Login Access Policies and Remote Site Settings with Health Check

Spot and close even more security gaps right from the Health Check page in Setup. In addition to password policies, session settings, and network access settings, you can now identify and fix security risks for login access policies and remote site settings. This feature is available in both Lightning Experience and Salesforce Classic.

From Setup, enter *Health Check* in the *Quick Find* box, then select **Health Check**.

SEE ALSO:

[Salesforce Help: Security Health Check](#)

[Salesforce Help: How Is the Health Check Score Calculated?](#)

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

Easily Retrieve Security and Risk Data with the Health Check API

Introducing Health Check API, which consists of two read-only Tooling API objects: SecurityHealthCheck and SecurityHealthCheckRisks. Make SOQL queries to retrieve your org's security settings, risks, Health Check score, and Salesforce baseline settings. You can add this information to your security monitoring systems and dashboards to verify that multiple Salesforce applications have the same security posture.

To get Health Check information through the API, you need command-line and administrative access to your Salesforce application.



Example: This query gets your org's Health Check score and a list of high-risk settings.

```
SELECT Score, (SELECT RiskType, Setting, SettingGroup,
OrgValue, StandardValue FROM SecurityHealthCheckRisks WHERE
RiskType=HIGH_RISK) FROM SecurityHealthCheck
```

SEE ALSO:

[Tooling API New and Changed Objects](#)

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

Access to Security Health Check Limited to Administrators

For security reasons, only users with both the “View Setup and Configuration” and “Modify All Data” user permissions can view and edit information on the Health Check page in Setup. Previously, all users could see the Health Check page. This feature is available in both Lightning Experience and Salesforce Classic.

From Setup, enter *Health Check* in the **Quick Find** box, then select **Health Check**.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Transaction Security Standard Policies Expanded

We’ve taken the Data Loader Lead Export policy and renamed it to Lead Data Export to reflect the policy’s new capabilities. The policy now checks for excessive downloads from both the Salesforce app and the API. The new version also triggers if more than 2,000 records are downloaded or a download takes more than one second. Previously, both conditions had to be true to trigger the policy.

Orgs created in the Summer '16 release get the updated policy implementation, but existing orgs need updating. Update your policy if you’ve enabled it.

 **Note:** The update procedure replaces your existing policy and overwrites all customizations. If you’ve customized your policy, reapply your changes after the update.

You don’t change the existing policy or class names for this update; only the Apex code. Here’s how to update your policy.

1. From Setup, enter *Transaction Security* in the **Quick Find** box, then select **Transaction Security**.
2. In the Apex Policy column on the Transaction Security Policies page, click **DataLoaderLeadExportCondition**. The Apex Class Detail page opens.
3. Click **Edit**. The Apex Class Edit page opens, showing the original policy implementation.
4. Replace the entire class with the following code:

```
global class DataLoaderLeadExportCondition implements TxnSecurity.PolicyCondition {
    public boolean evaluate(TxnSecurity.Event e){
        // The event data is a Map<String, String>.
        // We need to call the valueOf() method on appropriate data types
        // to use them in our logic.
        Integer numberOfRecords = Integer.valueOf(e.data.get('NumberOfRecords'));
        Long executionTimeMillis = Long.valueOf(e.data.get('ExecutionTime'));
        String entityName = e.data.get('EntityName');

        // Trigger the policy only for an export of leads, where we are downloading
        // more than 2000 records or it took more than 1 second (1000ms).
        if('Lead'.equals(entityName)){
            if(numberOfRecords > 2000 || executionTimeMillis > 1000){
                return true;
            }
        }

        // For everything else don't trigger the policy.
        return false;
    }
}
```

5. Reapply the customizations you made, and then click **Save**. You return to the Apex Class Detail page.
6. To return to the Transaction Security Policies page, click **Back to List: Transaction Security**.

Transaction Security Data Export Clarification

A policy that uses the Data Export event type is triggered only when the export is done with a default report type from the Report tab or is performed with an API client like Data Loader or Workbench. The available object types for a Data Export policy are Account, Case, Contact, Lead, and Opportunity.

DML Isn't Supported in Transaction Security Policies

Don't include Data Manipulation Language (DML) statements in your custom policies. DML operations are rolled back after a transaction security policy is evaluated, regardless if the policy evaluates to `true` or `false`.

Deployment: More Included Sandboxes

You now have new ways to deploy changes to your org. Enhancements include lots more sandboxes for some editions.

IN THIS SECTION:

[Download the Force.com Migration Tool from a New Location](#)

The location of the Force.com Migration Tool download link has moved from Setup to the Tools section of the Salesforce Developers site, where you can download all developer tools for Salesforce. The tool's download link is no longer available in the Salesforce user interface.

[New Change Set Components](#)

New components are available for deployment.

["Modify All Data" Permission Required for Using Inbound Change Sets and Editing Deployment Connections](#)

Users must now have the "Modify All Data" permission in addition to the "Deploy Change Sets" permission to deploy or validate change sets and to edit deployment connections. Administrators have this permission enabled by default. Previously, only the "Deploy Change Sets" permission was needed.

[Sandbox Enhancements](#)

Sandbox enhancements include increased sandbox licenses.

SEE ALSO:

[Metadata API: New and Changed Types](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Download the Force.com Migration Tool from a New Location

The location of the Force.com Migration Tool download link has moved from Setup to the Tools section of the Salesforce Developers site, where you can download all developer tools for Salesforce. The tool's download link is no longer available in the Salesforce user interface.

Download the Force.com Migration Tool from the [Force.com Migration Tool](#) page in [Salesforce Developers](#).

SEE ALSO:

[Peruse Developer Tool Download Links Without Logging In](#)

EDITIONS

Available in **Enterprise**, **Performance, Unlimited**, and **Developer** Editions

New Change Set Components

New components are available for deployment.

The components available for a change set vary by edition. The following components are now available for change sets.

Global Picklist

Represents the metadata for a global picklist: the set of shared picklist values that custom picklist fields can use.

Wave Application

Represents the Wave Analytics application.

Wave Dashboard

Represents the WaveDashboard object in the Wave Analytics application.

Wave Dataflow

Represents the WaveDataflow object in the Wave Analytics application.

Wave Dataset

Represents the WaveDataset object in the Wave Analytics application.

Wave Lens

Represents the WaveLens object in the Wave Analytics application.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

“Modify All Data” Permission Required for Using Inbound Change Sets and Editing Deployment Connections

Users must now have the “Modify All Data” permission in addition to the “Deploy Change Sets” permission to deploy or validate change sets and to edit deployment connections. Administrators have this permission enabled by default. Previously, only the “Deploy Change Sets” permission was needed.

The enforcement of this permission enhances the security of the Salesforce service and provides consistency with other metadata-related features and APIs, such as package installations, or Metadata API and Tooling API.

The following table lists the permissions needed for change sets.

User Permissions Needed	
To edit deployment connections:	“Deploy Change Sets” AND “Modify All Data”
To use outbound change sets:	“Create and Upload Change Sets,” “Create AppExchange Packages,” AND “Upload AppExchange Packages”
To use inbound change sets:	“Deploy Change Sets” AND “Modify All Data”

Sandbox Enhancements

Sandbox enhancements include increased sandbox licenses.

IN THIS SECTION:

[Get More Sandboxes to Play With](#)

Some Salesforce editions include more sandboxes than ever before. Find out what's changed.

Get More Sandboxes to Play With

Some Salesforce editions include more sandboxes than ever before. Find out what's changed.

See "[Sandboxes](#)" in "Limits Increased for More Power."

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

EDITIONS

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Development: Create Your Own Salesforce App

Whether you're using Visualforce, Apex, Lightning components, or our APIs with your favorite programming language, these enhancements to Force.com help you develop amazing applications and integrations.

IN THIS SECTION:

[Debugging](#)

Use new debugging features to root out problems in your Salesforce org. Debugging changes include a more efficient user interface for trace flags and debug levels, improved logging, and the ability to manage your Apex Debugger sessions in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

[Custom Metadata Types](#)

Use new features to create, edit, protect, and control custom metadata.

[Visualforce](#)

Develop apps to customize your organization using Visualforce, including Salesforce1 and other mobile apps. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. Enhancements in this release are focused on improving Visualforce for Lightning Experience.

[Apex Code](#)

We've simplified cross-namespace limits and added a Lightning page to view Apex test results more easily. We've also upgraded functionality related to Connected apps, CORS access, asynchronous callouts, and serialization.

[Lightning Components](#)

The Lightning Component framework powers Lightning Experience and Salesforce1. Use the framework to build mobile apps and pages in Lightning Experience, Salesforce1, Salesforce Classic, and Communities. Enhancements in this release are focused on security and supportability with critical releases for LockerService and access-check error enforcement. This release also includes support for the `Resource` global value provider and enhancements to the Developer Console to make it easier to create components and applications for use in different contexts.

API

We've expanded our APIs across the board by adding data and tooling objects, metadata types, REST resources, and SOSL statements in API version 37.0. We've also enhanced existing objects, REST resources, SOAP calls, and support for industry standards, such as cross-origin resource sharing (CORS).

ISVforce

ISVforce tools make it easy to build, package, and distribute apps and Lightning components. Now you can visualize AppExchange Checkout data and communicate effortlessly with customers and team members. We also updated branded login pages in Trailforce to give your customers a clean, modern login experience.

Peruse Developer Tool Download Links Without Logging In

We've cleaned up the Tools page in Setup and made it easier to access what you need. This page now contains only three links, and groups the tools into categories: a comprehensive list of Force.com tools and toolkits, integration tools on the AppExchange, and admin and developer tools on the AppExchange. The linked pages feature more tools than the Setup page did, and you can access them without logging in to Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

Debugging

Use new debugging features to root out problems in your Salesforce org. Debugging changes include a more efficient user interface for trace flags and debug levels, improved logging, and the ability to manage your Apex Debugger sessions in Lightning Experience. This feature is available in both Lightning Experience and Salesforce Classic.

EDITIONS

Available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

IN THIS SECTION:

Manage Logging More Easily

Gone are the days of hunting all around Setup to set up trace flags on users, Apex classes, and Apex triggers. You can now create all three trace flag types in one Setup location: the Debug Logs page. Easily enable logging on automated processes. And, manage your debug levels on the new Debug Levels page in Setup. This feature is available in both Lightning Experience and Salesforce Classic.

View Time Zones in Debug Logs

Debug logs now include time zone information for activity timestamps. Previously, you couldn't tell from a debug log which time zone the logged activities occurred in. This feature is available in both Lightning Experience and Salesforce Classic.

View Visualforce Controller Exceptions in Debug Logs

Debug logs now include exceptions thrown by Visualforce controllers. Visualforce controller exceptions have been visible in the Salesforce user interface, but the exceptions looked like successes in the debug log. This feature is available in both Lightning Experience and Salesforce Classic.

Use DebuggingHeader Consistently Across the APIs

We've standardized DebuggingHeader across the APIs. You can now provide a `categories` parameter in the SOAP, Metadata, and Tooling APIs. The `categories` parameter is of type `LogInfo`. `LogInfo` is a mapping of `category` to `level`. Previously, both `categories` and the `debugLevel` enumeration were available in the Tooling and Metadata APIs, but only `debugLevel` was available in the SOAP API.

Manage Your Apex Debugger Sessions in Lightning Experience

The Apex Debugger page in Setup is now available in Lightning Experience. You can purchase Apex Debugger licenses for your parent org and share them among the users in your org's sandboxes. View and terminate active sessions for your org and its sandboxes on the Apex Debugger page in Setup. This feature is available in both Lightning Experience and Salesforce Classic.

Review Debug Logs Without Sifting Through Extra Log Lines

Each debug log needs only one `USER_INFO` log line to record the timestamp in the user's time zone. But `USER_INFO` lines were sometimes written for each component being traced. We've fixed this bug. This feature is available in both Lightning Experience and Salesforce Classic.

Manage Logging More Easily

Gone are the days of hunting all around Setup to set up trace flags on users, Apex classes, and Apex triggers. You can now create all three trace flag types in one Setup location: the Debug Logs page. Easily enable logging on automated processes. And, manage your debug levels on the new Debug Levels page in Setup. This feature is available in both Lightning Experience and Salesforce Classic.

To create a trace flag, from Setup, enter *Debug Logs* in the *Quick Find* box, select **Debug Logs**, and then select **New** in the Trace Flags section. Set up logging on the automated process user simply by choosing **Automated Process** from the Traced Entity Type drop-down menu. The automated process user runs background jobs, such as emailing Chatter invitations.

New Trace Flag

To specify the type of information that is included in debug logs, add trace flags and debug levels. Each trace flag includes a debug level, a start time, an end time, and a log type.

Trace flags set logging levels (such as for Database, Workflow, and Validation) for a user, Apex class, or Apex trigger for up to 24 hours.

- Select Automated Process from the drop-down to set a trace flag on the automated process user. The automated process user runs background jobs, such as emailing Chatter invitations.
- Select User from the drop-down to specify a user whose debug logs you would like to monitor and retain.
- Select Apex Class or Apex Trigger from the drop-down to specify the log levels that take precedence while executing a specific Apex class or trigger. Setting class and trigger trace flags doesn't cause logs to be generated or saved. Class and trigger trace flags override other logging levels, including logging levels set by user trace flags, but they don't cause logging to occur. If logging is enabled when classes or triggers execute, logs are generated at the time of execution.

A total of 50 MB of debug logs can be retained for your org.

[Configure your Debug Levels.](#)

Cancel Save

Traced Entity Type: Apex Class

Traced Entity Name: SampleClass

Start Date: 4/14/2016 5:05 PM [4/14/2016 5:05 PM]

Expiration Date: 4/14/2016 5:35 PM [4/14/2016 5:05 PM]

Debug Level: ApexCodeFinest [New Debug Level](#)

Cancel Save

You no longer need to poke around in lookup windows to create and modify the debug levels for your trace flags. Manage all your debug levels on the new Debug Levels page in Setup, using the list view format you know and love.

Debug Levels

A debug level is a set of log levels for debug log categories: Database, Workflow, Validation, and so on. You can reuse debug levels across your [trace flags](#).

View: All [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New

Action	Name ↑	Workflow	Validation	Callout	Apex Code	Apex Profiling	Visualforce	System	Database
Edit Del	ApexCodeFinest	None	None	None	Finest	None	None	None	None
Edit Del	MostlyInfoApexSystemDebug	Info	Info	Info	Debug	Info	Info	Debug	Info

The locations of your existing Apex class and trigger trace flags are unchanged. To view the existing trace flags for an Apex class or trigger, visit the class or trigger detail page. To find these detail pages, from Setup, enter *Apex* in the *Quick Find* box, then select **Apex Classes** or **Apex Triggers**. The *Has Trace Flags* list view column shows which classes or triggers have trace flags. To view, edit, or delete the trace flags, select the name of a class or trigger, then select the **Trace Flags** tab.

View Time Zones in Debug Logs

Debug logs now include time zone information for activity timestamps. Previously, you couldn't tell from a debug log which time zone the logged activities occurred in. This feature is available in both Lightning Experience and Salesforce Classic.

Execution Log		
Timestamp	Event	Details
16:06:58:018	USER_INFO	[EXTERNAL]005D0000001bYPN devuser@.org Pacific Standard Time GMT-08:00
16:06:58:018	EXECUTION_STARTED	
16:06:58:018	CODE_UNIT_STARTED	[EXTERNAL]execute_anonymous_apex
16:06:58:023	HEAP_ALLOCATE	[72] Bytes:3
16:06:58:024	HEAP_ALLOCATE	[77] Bytes:152

View Visualforce Controller Exceptions in Debug Logs

Debug logs now include exceptions thrown by Visualforce controllers. Visualforce controller exceptions have been visible in the Salesforce user interface, but the exceptions looked like successes in the debug log. This feature is available in both Lightning Experience and Salesforce Classic.

Use DebuggingHeader Consistently Across the APIs

We've standardized DebuggingHeader across the APIs. You can now provide a `categories` parameter in the SOAP, Metadata, and Tooling APIs. The `categories` parameter is of type `LogInfo`. `LogInfo` is a mapping of `category` to `level`. Previously, both `categories` and the `debugLevel` enumeration were available in the Tooling and Metadata APIs, but only `debugLevel` was available in the SOAP API.

SEE ALSO:

[Changed Headers](#)

Manage Your Apex Debugger Sessions in Lightning Experience

The Apex Debugger page in Setup is now available in Lightning Experience. You can purchase Apex Debugger licenses for your parent org and share them among the users in your org's sandboxes. View and terminate active sessions for your org and its sandboxes on the Apex Debugger page in Setup. This feature is available in both Lightning Experience and Salesforce Classic.



Note: Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

SEE ALSO:

[Salesforce Release Notes: Lightning Experience: A Modern and Intelligent User Experience](#)

Review Debug Logs Without Sifting Through Extra Log Lines

Each debug log needs only one `USER_INFO` log line to record the timestamp in the user's time zone. But `USER_INFO` lines were sometimes written for each component being traced. We've fixed this bug. This feature is available in both Lightning Experience and Salesforce Classic.

SEE ALSO:

[Known Issue: Extra USER_INFO Lines in Debug Logs](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Custom Metadata Types

Use new features to create, edit, protect, and control custom metadata.

IN THIS SECTION:

[Get Even More Meta with Relationship Fields for Custom Metadata Types \(Pilot\)](#)

Custom metadata relationships provide additional metadata about objects and let you make direct comparisons between different custom metadata types.

[Added Picklist Support for Custom Metadata Types \(GA\)](#)

Custom picklist fields on custom metadata types are now fully supported. Use the picklist field type whenever you have a finite set of values for a custom field on a custom metadata type.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Get Even More Meta with Relationship Fields for Custom Metadata Types (Pilot)

Custom metadata relationships provide additional metadata about objects and let you make direct comparisons between different custom metadata types.

Like other relationships in Salesforce, custom metadata relationships have a particular domain. When you create a metadata relationship field on a type, you can relate it to another custom metadata type or the `EntityDefinition` object. When you create a record on a custom metadata type that has a relationship field, you can pick the entity definition or custom metadata type that record relates to.

The value of a relationship field with the `EntityDefinition` domain is a custom object or any of five supported standard objects.

- Account
- Case
- Contact
- Lead
- Opportunity

 **Note:** Custom metadata relationships are in pilot. This feature is enabled by default in sandbox and Developer Edition organizations. Contact Salesforce to enable custom metadata relationships in a production environment.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Added Picklist Support for Custom Metadata Types (GA)

Custom picklist fields on custom metadata types are now fully supported. Use the picklist field type whenever you have a finite set of values for a custom field on a custom metadata type.

For example, say that your company has three different support tiers that tackle different types of cases. By creating a picklist field for these support tiers on your custom metadata type, you can create custom metadata records more quickly and with fewer errors.

EDITIONS

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Visualforce

Develop apps to customize your organization using Visualforce, including Salesforce1 and other mobile apps. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. Enhancements in this release are focused on improving Visualforce for Lightning Experience.

Visualforce language and feature improvements make app development easier. These release notes explain new features in this release. For further information on features affected by these enhancements, refer to the [Visualforce Developer's Guide](#).

EDITIONS

Available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Visualforce for Lightning Experience is Generally Available](#)

With this release, Visualforce is fully supported in Lightning Experience.

[Set the Page Title in Lightning Experience with the <apex:page> title Attribute](#)

In prior releases of Lightning Experience setting the page title of a Visualforce page had no effect. With this release, you can set the page's title using the `title` attribute of the `<apex:page>` tag. This sets the text used in browser windows, tabs, and bookmarks, and makes using Lightning Experience in multiple tabs a better experience.

[Control Scroll-Based Zooming in Visualforce Maps](#)

Use the `scrollBasedZooming` attribute of the `<apex:map>` tag to control whether maps can be zoomed using a scroll wheel or touch-based controls. Setting `scrollBasedZooming` to `false` prevents accidental map zooming, especially on touch-based devices such as the Apple Magic Mouse or Logitech M600 mouse.

[Fix for Rendering Quirks When SVG Namespace Added to Page](#)

In previous releases, if you added an SVG graphic to a Visualforce, and the markup for that graphic included an `xmlns` attribute referencing the namespace for SVG XML, it caused significant issues when rendering the page. We've fixed the underlying issue.

[Disable Custom DocTypes in Visualforce Markup \(Critical Update\)](#)

This critical update changes the rules for Visualforce markup to no longer allow the use of custom docTypes.

["PageReference getContent\(\) and getContentAsPDF\(\) Methods Behave as Callouts" Critical Update Postponed](#)

In Summer '15, we changed the behavior of the `getContent()` and `getContentAsPDF()` methods of the `PageReference` object. This change was released as a critical update named "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" and was scheduled for auto-activation in Summer '16. The auto-activation date has been postponed until Winter '17.

Visualforce for Lightning Experience is Generally Available

With this release, Visualforce is fully supported in Lightning Experience.

Does this mean that every feature of Visualforce is available in Lightning Experience? In a word, no. There remain a number of behavior differences that are due to intrinsic differences between Lightning Experience and Salesforce Classic. We don't expect these to go away, but we do expect them to evolve as Lightning Experience matures. Keep your eyes on this channel.

For a summary of Visualforce for Lightning Experience differences, see [What's Not Available in Summer '16 Lightning Experience Features](#) elsewhere in the release notes. To get started creating apps for Lightning Experience with the full details, see the Lightning Experience Development trail on Trailhead.

SEE ALSO:

[Salesforce Help: What's Not Available in Lightning Experience](#)

[Trailhead: Visualforce & Lightning Experience](#)

Set the Page Title in Lightning Experience with the `<apex:page> title` Attribute

In prior releases of Lightning Experience setting the page title of a Visualforce page had no effect. With this release, you can set the page's title using the `title` attribute of the `<apex:page>` tag. This sets the text used in browser windows, tabs, and bookmarks, and makes using Lightning Experience in multiple tabs a better experience.

You can also set a Visualforce page title by adding a static `<title>` HTML tag to your page. Although using the page's `title` attribute is usually preferred, the treatment of the page title is the same.

Finally, while it's not a primary use case, setting the page's `title`, using either technique, also affects the page in the Salesforce1 mobile browser app. The page's title appears in the history stack, and in browser tabs or windows. The page title doesn't appear in the Salesforce1 downloadable app.

Control Scroll-Based Zooming in Visualforce Maps

Use the `scrollBasedZooming` attribute of the `<apex:map>` tag to control whether maps can be zoomed using a scroll wheel or touch-based controls. Setting `scrollBasedZooming` to `false` prevents accidental map zooming, especially on touch-based devices such as the Apple Magic Mouse or Logitech M600 mouse.

Especially on the Apple Magic Mouse, the twitchy, seemingly random map zooming could be maddening. Disabling `scrollBasedZooming` might save your users' sanity.

Fix for Rendering Quirks When SVG Namespace Added to Page

In previous releases, if you added an SVG graphic to a Visualforce, and the markup for that graphic included an `xmlns` attribute referencing the namespace for SVG XML, it caused significant issues when rendering the page. We've fixed the underlying issue.

Specifically, you would have encountered this issue when you added markup to a page that looked like the following.

```
<svg ... xmlns="http://www.w3.org/2000/svg" ... >
```

The resulting rendering issues could take various forms, but none of them produced desirable results.

This issue has become especially acute with the release of the [Salesforce Lightning Design System](#) (SLDS), which uses SVG graphics for many user interface elements. Since the reception for SLDS has been...*enthusiastic*, we wanted to get this stumbling block out of your way.

Disable Custom DocTypes in Visualforce Markup (Critical Update)

This critical update changes the rules for Visualforce markup to no longer allow the use of custom docTypes.

When this critical update is enabled, you can't use custom docTypes in Visualforce markup.

This update applies to extending the XML allowed in Visualforce markup by declaring a custom docType using the `<!DOCTYPE myDocType [. . .]>` pattern. Custom docTypes were never documented or supported. Eliminating them allows Visualforce processing to be simplified and optimized.

 **Note:** This update doesn't apply to the documented and supported method of changing the page's declared docType using the `docType` attribute of the `<apex:page>` tag.

We recommend that you test this update in a sandbox or Developer Edition org to verify correct behavior of your Visualforce pages before enabling it in your production org.

To activate this critical update:

1. From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
2. Click **Activate** for "Disable Custom DocTypes in Visualforce Markup".

"PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed

In Summer '15, we changed the behavior of the `getContent()` and `getContentAsPDF()` methods of the `PageReference` object. This change was released as a critical update named "PageReference `getContent()` and `getContentAsPDF()` Methods Behave as Callouts" and was scheduled for auto-activation in Summer '16. The auto-activation date has been postponed until Winter '17.

SEE ALSO:

[Summer '15 Release Notes: PageReference `getContent\(\)` and `getContentAsPDF\(\)` Methods Behave as Callouts](#)

[Winter '16 Release Notes: Make Calls to PageReference.`getContent\(\)` in Asynchronous Apex](#)

[Spring '16 Release Notes: Make Calls to PageReference.`getContent\(\)` After DML and Savepoints](#)

Apex Code

We've simplified cross-namespace limits and added a Lightning page to view Apex test results more easily. We've also upgraded functionality related to Connected apps, CORS access, asynchronous callouts, and serialization.

For detailed information on these enhancements, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[Increased Cross-Namespace Limits](#)

Good news! We've increased the number of unique, certified namespaces that can be invoked during a single Apex transaction.

[Take More Control over Your Connected Apps with the Enhanced Connected App Plug-in](#)

We've extended the `Apex ConnectedAppPlugin` class to give you more control over how your Salesforce connected app is invoked. With the `Apex InvocationContext` enum, you can tell which authentication protocol is invoking the connected app. You can use the `modifySAMLResponse` method to modify the SAML XML request before the Salesforce IDP verifies and passes the certificate to the target service provider.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

[Provision Your Connected Apps with Confidence](#)

Provisioning users for your connected app is key to its adoption. Until now, it's been a challenge to test and manage the user provisioning process. But that's changed with the new test utility class for writing automated tests. Use the `testConnectorUtil` class to write automated tests that simulate user provisioning. Invoke the `createConnectedApp` method within an Apex test to create an instance of your connected app. For managing the provisioning process, we've extended the `UserProvisioningRequest` object to better handle provisioning failures.

[View Apex Test Results More Easily](#)

The new Apex Test History page shows all the test results associated with a test run. The page shows results only for tests that have been run asynchronously. This feature is available in Lightning Experience only.

[Configure Your Apex Test Runs More Easily in the Tooling API](#)

The Tooling API's `runTestsAsynchronous()` SOAP call and `/runTestsAsynchronous/` REST resource now take a `testLevel` parameter. Providing a `TestLevel` enum value of `RunSpecifiedTests`, `RunLocalTests`, or `RunAllTestsInOrg` lets you quickly and easily set up test runs. This parameter is required in the SOAP call, although its value can be `null`. For the REST resource, the new parameter is optional.

[Run SOQL Queries on PlatformAction with a LIMIT Clause](#)

When you run a SOQL query in Apex without a `LIMIT` clause, a `LIMIT` is added to the query. However, queries on the `PlatformAction` object that contained a `LIMIT` clause were being rejected, so we removed the `LIMIT` clause restriction on `PlatformAction` queries. You can now successfully run a SOQL query containing a `LIMIT` clause on the `PlatformAction` object in Apex.

[Simplify Development of Asynchronous Callouts by Using Named Credentials](#)

You can now use named credentials in long-running asynchronous callouts from a Visualforce page's controller. A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. Salesforce manages all authentication for callouts that specify a named credential as the callout endpoint so that your Apex code doesn't have to. You can also skip remote site settings, which are otherwise required for callouts to external sites, for the site defined in the named credential. This feature is available in both Lightning Experience and Salesforce Classic.

[Suppress Null Values When Serializing Apex Objects](#)

The current implementation of the Apex `serialize` method returns `null` values when serializing Apex objects into JSON. Now we've added a `serialize` method with a flag to suppress `null` values. Set `suppressApexObjectNulls` to `true` to suppress them when serializing Apex objects into JSON.

[Use CORS to Access Apex REST Classes](#)

CORS (cross-origin resource sharing) is a W3C recommendation that enables web browsers to request resources from origins other than their own (cross-origin requests). For example, using CORS, a JavaScript script at `https://www.example.com` can request a resource from `https://www.salesforce.com`. Apex REST now supports CORS.

[View Skeleton Code for Global Apex Classes in Installed Managed Packages](#)

You can now view skeleton code that includes the global constructors, methods, variables, and properties for global Apex classes in the managed packages you've installed in your org. Formerly, when you viewed these classes in Setup you saw their constructor and method signatures, but in other development environments you saw only `(hidden)`. You can still see the constructor and method signatures in Setup. Now you can also view a skeleton of the code for global classes in the Developer Console or your favorite IDE. You can also see the skeleton code when retrieving the body of a global managed class using the Metadata, SOAP, or Tooling API.

[Get a Map of Populated SObject Fields](#)

We've added a method on the Apex `SObject` class that makes it more efficient to iterate over fields that have been populated in memory.

[New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces](#)

These classes, methods, constants, enumerations, exceptions, and interfaces are new or have changed.

[ConnectApi \(Chatter in Apex\)](#)

Create custom experiences in Salesforce using Chatter in Apex. In this release, you can include a code block in your feed posts, get article recommendations, and more.

[Increased Non-Selective Query Limits](#)

We've increased the Apex non-selective query limit from 100,000 to 200,000 rows.

Increased Cross-Namespace Limits

Good news! We've increased the number of unique, certified namespaces that can be invoked during a single Apex transaction.

Previously, the limit during a single transaction was 10. We've removed this limit and added a cumulative cross-namespace limit.

There's now no limit on the number of certified namespaces that can be invoked in a single transaction. However, the number of operations that can be performed in each namespace must not exceed the per-transaction limits. In place of the former limit, there's a new limit on the cumulative number of operations that can be made across namespaces in a transaction. This cumulative limit is 11 times the per-namespace limit. For example, if the per-namespace limit for SOQL queries is 100, a single transaction can perform up to 1,100 SOQL queries. In this case, the cumulative limit is 11 times the per-namespace limit of 100. These queries can be performed across an unlimited number of namespaces, as long as any one namespace doesn't have more than 100 queries.

 **Note:** Limits that are shared across all namespaces, such as the limit on maximum CPU time, remain the same. The new cumulative limit doesn't affect these limits.

The new cross-namespace limit applies to the per-namespace limits listed in [Execution Governors and Limits](#).

 **Note:** These increased cross-namespace limits apply only to namespaces in certified managed packages. Namespaces in packages that aren't certified don't have their own separate governor limits. The resources they use continue to count against the same governor limits used by your org's custom code.

Take More Control over Your Connected Apps with the Enhanced Connected App Plug-in

We've extended the Apex `ConnectedAppPlugin` class to give you more control over how your Salesforce connected app is invoked. With the Apex `InvocationContext` enum, you can tell which authentication protocol is invoking the connected app. You can use the `modifySAMLResponse` method to modify the SAML XML request before the Salesforce IDP verifies and passes the certificate to the target service provider.

Provision Your Connected Apps with Confidence

Provisioning users for your connected app is key to its adoption. Until now, it's been a challenge to test and manage the user provisioning process. But that's changed with the new test utility class for writing automated tests. Use the `testConnectorUtil` class to write automated tests that simulate user provisioning. Invoke the `createConnectedApp` method within an Apex test to create an instance of your connected app. For managing the provisioning process, we've extended the `UserProvisioningRequest` object to better handle provisioning failures.

The extended `UserProvisioningRequest` object improves support for identifying, resolving, and tracking user provisioning errors. Failures can occur during the provisioning process for several reasons, including network outages, session timeouts, permissions issues, and record locks. Troubleshooting failed UPRs is an iterative process: Repeat the actions that caused the `userProvisioningRequest` (UPR) to fail, make a change, and then request the Salesforce provisioning engine to retry the UPR. Each UPR is an independent transaction, and it's possible for the retry to cause a failure with a different root cause. So it's hard to distinguish failed events that you addressed from the ones that require more action.

To make troubleshooting easier, you can use the `State` field of the UPR object to mark failed events and exclude from future failure reports. For instance, if you tried to correct the cause of the failure and requested the provisioning engine to retry the UPR, mark the failed UPR `Retried`. If the action against the target was completed manually, mark it `Manually Completed`.

Two new fields were added to the UPR object to support this feature. When a retry event is created, the failed UPR is cloned and resubmitted. The `ParentID` field contains a lookup to the failed UPR to use to clone the new UPR. The `Retry Count` field contains the number of retry attempts that were performed. You can add custom business logic to the field, like "Retry 5 times then stop and notify your admin."

View Apex Test Results More Easily

The new Apex Test History page shows all the test results associated with a test run. The page shows results only for tests that have been run asynchronously. This feature is available in Lightning Experience only.

From Setup, enter `Apex` in the `Quick Find` box, and select **Apex Test History** to view all test run results for your org. Test results are retained for 30 days after they finish running, unless cleared.

The Apex Test History page lists the test runs by ID. Click a test run ID to display all the test methods for that test run. You can filter the test methods to show passed, failed, or all test methods for a particular test run.

Click the test class name to view more details about a specific test run.

The screenshot shows the 'Apex Test History' page. On the left, there is a table with 3 items, sorted by RUN ID. The table has columns for RUN ID, TIME, and STATUS. The right side of the page shows a filter for 'ALL' test results, with a table of 4 items, sorted by Method Name and filtered by Apex Test Run Result. The table has columns for METHOD NAME, NAME, RUN TIME, and PASS/FAIL.

RUN ID ↑	TIME	STATUS
707R000000056bz1AA	00:00	1/1
707R000000056c41AA	00:00	1/1
707R000000056c91AA	00:00	1/1

METHOD NAME ↑	NAME	RUN TIME	PASS/FAIL
testBoilingPoint	TemperatureConverterTest	00:00	Pass
testFreezingPoint	TemperatureConverterTest	00:00	Pass
testNegativeTemp	TemperatureConverterTest	00:00	Pass
testWarmTemp	TemperatureConverterTest	00:00	Pass

Configure Your Apex Test Runs More Easily in the Tooling API

The Tooling API's `runTestsAsynchronous()` SOAP call and `/runTestsAsynchronous/` REST resource now take a `testLevel` parameter. Providing a `TestLevel` enum value of `RunSpecifiedTests`, `RunLocalTests`, or `RunAllTestsInOrg` lets you quickly and easily set up test runs. This parameter is required in the SOAP call, although its value can be `null`. For the REST resource, the new parameter is optional.

SEE ALSO:

[Tooling API Calls and Methods](#)

[Force.com Tooling API: REST Resources](#)

[Force.com Tooling API: SOAP Calls](#)

Run SOQL Queries on PlatformAction with a LIMIT Clause

When you run a SOQL query in Apex without a LIMIT clause, a LIMIT is added to the query. However, queries on the PlatformAction object that contained a LIMIT clause were being rejected, so we removed the LIMIT clause restriction on PlatformAction queries. You can now successfully run a SOQL query containing a LIMIT clause on the PlatformAction object in Apex.

Simplify Development of Asynchronous Callouts by Using Named Credentials

You can now use named credentials in long-running asynchronous callouts from a Visualforce page's controller. A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. Salesforce manages all authentication for callouts that specify a named credential as the callout endpoint so that your Apex code doesn't have to. You can also skip remote site settings, which are otherwise required for callouts to external sites, for the site defined in the named credential. This feature is available in both Lightning Experience and Salesforce Classic.

Named credentials are now supported in asynchronous web service callouts that use the `Continuation` class. Previously, named credentials were supported in web service callouts that ran asynchronously only via Queueable Apex, that is, by implementing the `Queueable` interface.

In your code, specify the named credential URL instead of the long-running service URL as the callout endpoint. A named credential URL contains the scheme `callout:`, the name of the named credential, and an optional path. For example:

`callout:My_Named_Credential/some_path`.

 **Example:** The following Apex controller, which is associated with a Visualforce page, specifies a named credential as the callout endpoint.

```
public with sharing class ContinuationController {
    // Unique label corresponding to the continuation
    public String requestLabel;
    // Result of callout
    public String result {get;set;}
    // Callout endpoint as a named credential URL
    private static final String NAMED_CREDENTIAL_URL =
        'callout:My_Named_Credential/some_path';

    // Action method
    public Object startRequest() {
        // Create continuation with a timeout
        Continuation con = new Continuation(40);
        // Set callback method
        con.continuationMethod='processResponse';

        // Create callout request
        HttpRequest req = new HttpRequest();
        req.setMethod('GET');
        req.setEndpoint(NAMED_CREDENTIAL_URL);

        // Add callout request to continuation
        this.requestLabel = con.addHttpRequest(req);

        // Return the continuation
        return con;
    }

    // Callback method
```

```
public Object processResponse() {
    // Get the response by using the unique label
    HttpResponse response = Continuation.getResponse(this.requestLabel);
    // Set the result variable that is displayed on the Visualforce page
    this.result = response.getBody();

    // Return null to re-render the original Visualforce page
    return null;
}
}
```

SEE ALSO:

- [Apex Developer Guide: Named Credentials as Callout Endpoints](#)
- [Apex Developer Guide: Make Long-Running Callouts from a Visualforce Page](#)
- [Salesforce Help: Define a Named Credential](#)
- [Lightning Experience: A Modern and Intelligent User Experience](#)

Suppress Null Values When Serializing Apex Objects

The current implementation of the Apex `serialize` method returns `null` values when serializing Apex objects into JSON. Now we've added a `serialize` method with a flag to suppress `null` values. Set `suppressApexObjectNulls` to `true` to suppress them when serializing Apex objects into JSON.

Use CORS to Access Apex REST Classes

CORS (cross-origin resource sharing) is a W3C recommendation that enables web browsers to request resources from origins other than their own (cross-origin requests). For example, using CORS, a JavaScript script at `https://www.example.com` can request a resource from `https://www.salesforce.com`. Apex REST now supports CORS.

To access Apex REST classes from JavaScript in a web browser, add the origin that's serving the script to the CORS whitelist. To add an origin to the CORS whitelist, from Setup, enter `CORS` in the **Quick Find** box, then select **CORS**. Click **New**, and then enter an origin URL pattern.

The origin URL pattern must include HTTPS (unless you're using your localhost) and a domain name and can optionally include a port. The wildcard character (*) is supported and must precede a second-level domain name. For example, `https://*.example.com` adds all subdomains of `example.com` to the whitelist.

If a browser that supports CORS makes a request from an origin in the Salesforce CORS whitelist, Salesforce returns the origin in the `Access-Control-Allow-Origin` HTTP header. Salesforce also returns any additional CORS HTTP headers. If the origin isn't in the whitelist, Salesforce returns HTTP status code 403.

You must still pass an OAuth token with requests that require it.

SEE ALSO:

- [IdeaExchange: Support of CORS \(Cross-Origin Resource Sharing\) in Salesforce REST](#)

View Skeleton Code for Global Apex Classes in Installed Managed Packages

You can now view skeleton code that includes the global constructors, methods, variables, and properties for global Apex classes in the managed packages you've installed in your org. Formerly, when you viewed these classes in Setup you saw their constructor and method signatures, but in other development environments you saw only `(hidden)`. You can still see the constructor and method signatures in Setup. Now you can also view a skeleton of the code for global classes in the Developer Console or your favorite IDE. You can also see the skeleton code when retrieving the body of a global managed class using the Metadata, SOAP, or Tooling API.

Here's a sample of what you see now when you open a global Apex class from an installed managed package. Non-global constructors, methods, properties, and fields still aren't shown.

Example:

```

/*
This file is generated and isn't the actual source code for this
managed global class.
This read-only file shows the class's global constructors,
methods, variables, and properties.
To enable code to compile, all methods return null.
*/
global class MyClass {
    global Decimal myDec;
    global String myString {
        get;
        set;
    }
    global MyClass() {
    }
    global Integer myMethod(Integer arg1) {
        return null;
    }
}

```

Get a Map of Populated SObject Fields

We've added a method on the Apex SObject class that makes it more efficient to iterate over fields that have been populated in memory. Previously, iterating over just the populated the fields of an SObject involved some complicated programming. For example, if you queried an SObject using SOQL, it wasn't easy to tell which fields were returned. In Summer '16, we've introduced a new method on the SObject class that returns a map of populated field names and their corresponding values:

```
Map<String, Object> getPopulatedFieldsAsMap()
```

The returned map contains only the fields that have been populated in memory for the SObject instance, which makes it easy to iterate over those fields. A field is populated in memory in the following cases.

- The field has been queried by a SOQL statement.
- The field has been explicitly set before the call to the `getPopulatedFieldsAsMap()` method.

Fields on related objects that are queried or set are also returned in the map.

The following example iterates over the map returned by the `getPopulatedFieldsAsMap()` method after a SOQL query.

```

Account a = new Account();
a.name = 'TestMapAccount1';
insert a;

```

```

a = [select Id,Name from Account where id=:a.Id];
Map<String, Object> fieldsToValue = a.getPopulatedFieldsAsMap();

for (String fieldName : fieldsToValue.keySet()){
    System.debug('field name is ' + fieldName + ', value is ' +
        fieldsToValue.get(fieldName));
}

// Example debug statement output:
// DEBUG|field name is Id, value is 001R0000003EPPkIAO
// DEBUG|field name is Name, value is TestMapAccount1

```

This example iterates over the map returned by the `getPopulatedFieldsAsMap()` method after fields on the `SObject` are explicitly set.

```

Account a = new Account();
a.name = 'TestMapAccount2';
a.phone = '123-4567';
insert a;
Map<String, Object> fieldsToValue = a.getPopulatedFieldsAsMap();

for (String fieldName : fieldsToValue.keySet()) {
    System.debug('field name is ' + fieldName + ', value is ' +
        fieldsToValue.get(fieldName));
}

// Example debug statement output:
// DEBUG|field name is Name, value is TestMapAccount2
// DEBUG|field name is Phone, value is 123-4567
// DEBUG|field name is Id, value is 001R0000003EPPpIAO

```

The following example shows how to use the `getPopulatedFieldsAsMap()` method with related objects.

```

Account a = new Account();
a.name='TestMapAccount3';
insert a;
Contact c = new Contact();
c.firstname='TestContactFirstName';
c.lastName = 'TestContactLastName';
c.accountid = a.id;
insert c;

c = [SELECT id, Contact.Firstname, Contact.Account.Name FROM Contact
    where id=:c.id limit 1];
Map<String, Object> fieldsToValue = c.getPopulatedFieldsAsMap();

// To get the fields on Account, get the Account object
// and call getMapPopulatedFieldsAsMap() on that object.

a = (Account)fieldsToValue.get('Account');
fieldsToValue = a.getPopulatedFieldsAsMap();

for (String fieldName : fieldsToValue.keySet()) {
    System.debug('field name is ' + fieldName + ', value is ' +
        fieldsToValue.get(fieldName));
}

```

```

}

// Example debug statement output:
// DEBUG|field name is Id, value is 001R00000003EPPuIAO
// DEBUG|field name is Name, value is TestMapAccount3

```

New and Changed Apex Classes, Enumerations, Exceptions, and Interfaces

These classes, methods, constants, enumerations, exceptions, and interfaces are new or have changed.

IN THIS SECTION:

[New Apex Class](#)

These classes were introduced in this release.

[Changed Apex Classes](#)

These existing classes have new or changed methods or constants.

New Apex Class

These classes were introduced in this release.

ConnectorTestUtil Class in the UserProvisioning Namespace

The new `UserProvisioning.ConnectorTestUtil` class enables developers to write Apex test classes for connectors used by the connected app provisioning solution.

createConnectedApp (connectedAppName)

Creates an instance of a connected app to simulate provisioning.

ReportFactWithSummaries Class in the Reports Namespace

The new `Reports.ReportFactWithSummaries` class contains methods that return information about report data.

getAggregates ()

Returns summary-level data for a report, including the record count.

getKey ()

Returns the unique identifier for a row or column grouping. This identifier can be used to index specific data values within each grouping.

toString ()

Returns a string.

Classes in the Messaging Namespace

RenderEmailTemplateBodyResult Class

The new `Messaging.RenderEmailTmeplateBodyResult` contains methods for rendering email templates.

getErrors ()

If an error occurred during the `renderEmailTemplate` method, a `RenderEmailTemplateError` object is returned.

getMergedBody ()

Returns the rendered body text with merge field references replaced with the corresponding record data.

getSuccess ()

Indicates whether the operation was successful.

RenderEmailTemplateError Class

The new `messaging.RenderEmailTemplateError` class contains methods that represent an error the `RenderEmailTemplateBodyResult` object can contain.

getFieldName()

Returns the name of the merge field in the error.

getMessage()

Returns a message describing the error.

getOffset()

Returns the offset within the supplied body text where the error was discovered. If the offset cannot be determined, -1 is returned.

getStatusCode()

Returns a Salesforce API status code.

Changed Apex Classes

These existing classes have new or changed methods or constants.

Auth.AuthConfiguration**New Method****getAllowInternalUserLoginEnabled()**

Indicates whether the community allows internal users to log in using the community login page. Admins configure the setting **Allow internal users to log in directly to the community** on the Login & Registration page in Community Management. It's disabled by default.

Auth.ConnectedAppPlugin**New Methods****authorize(userId, connectedAppId, isAdminApproved, context)**

Authorizes the specified user for the connected app. If the connected app is set for users to self-authorize, this call isn't necessary.

customAttributes(userId, connectedAppId, formulaDefinedAttributes, context)

Sets new attributes for the specified user. When the connected app gets the user's attributes from the UserInfo endpoint or through a SAML assertion, use this method to update those attribute values.

modifySAMLResponse(authSession, connectedAppId, samlResponse)

Modifies the XML generated by the Salesforce SAML Identity Provider (IDP) before it's sent to the service provider.

refresh(userId, connectedAppId, context)

Salesforce calls this method during a refresh token exchange.

Dom.XmlNode**New Method****insertBefore(newChild, refChild)**

Inserts a new child node before the specified node.

KnowledgeSuggestionFilter Class**New Method****addTopic(topic)**

Specifies the article topic to return. This filter is optional.

Reports.StandardFilterInfoPicklist**New Methods****getLabel ()**

Returns the display name of the standard filter picklist.

getType ()

Returns the type of the standard filter picklist.

Schema.DescribesObjectResult Class**New Method****isMruEnabled ()**

Returns `true` if Most Recently Used (MRU) list functionality is enabled for the object, `false` otherwise.

QuickAction.QuickActionDefaultsHandler**New Method****newSendEmailQuickActionDefaults(contextId, replyToId)**

Creates a new `QuickAction.SendEmailQuickActionDefaults` instance for testing a class implementing the `QuickAction.QuickActionDefaultsHandler` interface.

System.Crypto**New Method****signXML(algorithmName, node, idAttributeName, certDevName, refChild)**

Inserts the signature envelope before the specified child node.

System.JSON**New Methods****serialize(objectToSerialize, suppressApexObjectNulls)**

Suppresses `null` values when serializing Apex objects into JSON content.

serializePretty(objectToSerialize, suppressApexObjectNulls)

Suppresses `null` values when serializing Apex objects into JSON content and generates indented content using the pretty-print format.

System.Messaging Class**New Methods****renderEmailTemplate(whoId, whatId, bodies)**

Returns an array of `RenderEmailTemplateBodyResult` objects, each of which corresponds to an element in the supplied array of text bodies. Each `RenderEmailTemplateBodyResult` provides a success or failure indication along with either an error code or the rendered text.

renderStoredEmailTemplate(templateId, whoId, whatId)

Renders a text, custom, HTML, or Visualforce email template that exists in the database into an instance of `Messaging.SingleEmailMessage`.

System.SObject**New Method****getPopulatedFieldsAsMap ()**

Returns a map of populated field names and their corresponding values. The map contains only the fields that have been populated in memory for the `SObject` instance.

TxnSecurity.Event**Changed Property****data**

ActionName and UserName have been added to the `Event` `data` map for the Entity event. The Browser, Platform, TimeStamp, URI, and UserAgent values have been removed from the `Event` `data` map for all events.

ConnectApi (Chatter in Apex)

Create custom experiences in Salesforce using Chatter in Apex. In this release, you can include a code block in your feed posts, get article recommendations, and more.

Many Chatter REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Chatter in Apex*.

In Apex, it's possible to access some Chatter data using SOQL queries and objects. However, `ConnectApi` classes expose Chatter data in a much simpler way. Data is localized and structured for display. For example, instead of making many calls to access and assemble a feed, you can do it with a single call.

 **Note:** To integrate mobile apps, intranet sites, and third-party web applications with Chatter and Communities, use [Chatter REST API](#).

IN THIS SECTION:

[New and Changed Chatter in Apex Classes](#)

[New and Changed Chatter in Apex Input Classes](#)

[New and Changed Chatter in Apex Output Classes](#)

[New and Changed Chatter in Apex Enums](#)

New and Changed Chatter in Apex Classes

Chatter

This method is in the `ConnectApi.Chatter` class.

Submit a Chatter email digest job

Use the new `submitDigestJob(period)` method to submit a Chatter email digest job.

To use this method, contact Salesforce to enable API-only Chatter digests.

 **Warning:** Enabling API-only Chatter digests disables the scheduled digests for your org. You must call the API for your users to receive their digests.

We recommend scheduling digest jobs by implementing the Apex `Schedulable` interface with this new method. For example:

```
global class ExampleDigestJob1 implements Schedulable {
    global void execute(SchedulableContext context) {
        ConnectApi.Chatter.submitDigestJob(ConnectApi.DigestPeriod.DailyDigest);
    }
}
```

External Email Services

This method is in the `ConnectApi.ExternalEmailService` class.

Retrieve information about whether an external email service has been authorized to send emails on behalf of a user

To retrieve a user's OAuth information when sending email through an external email account, use the new `getUserOAuthInfo(landingpage)` method.

Feeds

These methods are in the `ConnectApi.ChatterFeeds` class.

Include a code block in a feed post

To include a code block in a feed post, use the existing `postFeedElement(communityId, feedElement)` method with the updated `ConnectApi.MarkupBeginSegmentInput` and `ConnectApi.MarkupEndSegmentInput` classes.

Approve a feed post (Beta)

 **Note:** This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

To approve a feed post, use the new `setFeedEntityStatus(communityId, feedElementId, status)` method with the new `ConnectApi.StatusCapabilityInput` class.

Only users with the "Can Approve Feed Post" permission can set the status of a feed element.

Get related questions (Beta)

 **Note:** This release contains a beta version of related questions, which means it's a high-quality feature with known limitations. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for related questions in the [Community Implementation](#) group in the Success Community.

To get questions related to a context question, use the new `getRelatedPosts(communityId, feedElementId, filter, maxResults)` method, where `feedElementId` is a question ID.

This method has a matching set test method.

Recommendations

These methods are in the `ConnectApi.Recommendations` class.

Get article recommendations

Use these existing methods to get article recommendations.

- `getRecommendationForUser(communityId, userId, action, objectId)`—Returns the recommendation for the context user for the specified action and object ID.
- `getRecommendationsForUser(communityId, userId, contextAction, contextObjectId, channel, maxResults)`—Returns the user, group, file, article, record, topic, custom, and static recommendations for the context user.

- `getRecommendationsForUser(communityId, userId, action, contextAction, contextObjectId, channel, maxResults)`—Returns the recommendations for the context user for the specified action.
- `getRecommendationsForUser(communityId, userId, action, objectCategory, contextAction, contextObjectId, channel, maxResults)`—Returns the recommendations for the context user for the specified action and object category.

Each method has a matching set test method.

Reject an article recommendation

Use this existing method to reject an article recommendation.

- `rejectRecommendationForUser(communityId, userId, action, objectId)`—Rejects the recommendation for the context user for the specified action and object ID.

Topics

This method is in the `ConnectApi.Topics` class.

Provide a list of topic suggestions to assign to a record or feed item to improve future topic suggestions

To provide a list of suggested topics to assign to a record or feed item, use the existing `reassignTopicsByName(communityId, recordId, topicNames)` method with the updated `ConnectApi.TopicNamesInput` class.

Zones

These methods are in the `ConnectApi.Zones` class.

Guest users can search in zones

If your community allows access without logging in, these methods are available to guest users. These methods return information that the guest user has access to.

- `searchInZone(communityId, zoneId, q, filter)`
- `searchInZone(communityId, zoneId, q, filter, pageParam, pageSize)`
- `searchInZone(communityId, zoneId, q, filter, language)`

New and Changed Chatter in Apex Input Classes

Feeds

`ConnectApi.MarkupBeginSegmentInput`

The `markupType` property of this input class supports a new `Code` value. Markup segments with a `markupType` of `Code` can include only text segments.

`ConnectApi.MarkupEndSegmentInput`

The `markupType` property of this input class supports a new `Code` value.

`ConnectApi.StatusCapabilityInput (Beta)`

This new input class is a subclass of `ConnectApi.FeedElementCapabilityInput` and has one property, `feedEntityStatus`, that specifies the status of the feed item. Values are:

- `PendingReview`—The feed item isn't approved yet and therefore isn't published or visible.
- `Published`—The feed item is approved and visible.

Topics

ConnectApi.TopicNamesInput

The new `topicSuggestions` property lists suggested topics to assign to a feed item or record to improve future topic suggestions.

New and Changed Chatter in Apex Output Classes

Chatter

ConnectApi.DigestJob

This new output class has one property, `period`, which specifies the period of time included in a Chatter email digest.

External Email Services

ConnectApi.OauthProviderInfo Class

This new output class has these properties:

- `authorizationUrl`—The URL used for authorization.
- `name`—The name of the OAuth service provider.

ConnectApi.UserOauthInfo Class

This new output class has these properties:

- `availableExternalEmailService`—The available OAuth service provider.
- `isAuthenticated`—Specifies whether the user is authenticated (`true`) or not (`false`).

Feeds

ConnectApi.FeedElementCapabilities

This output class has these new properties.

- `interactions`—If a feed element has this capability, it has information about user interactions.
- `status` (Beta)—If a feed element has this capability, it has a status that determines its visibility.

ConnectApi.InlineImageSegment

The new `fileExtension` property is the extension of the inline image, such as `gif`.

ConnectApi.InteractionsCapability

This new output class is a subclass of `ConnectApi.FeedElementCapability`. It has one property, `count`, which is the number of individual views, likes, and comments on a feed post.

ConnectApi.MarkupBeginSegment

The `markupType` property of this output class supports a new `Code` value.

ConnectApi.MarkupEndSegment

The `markupType` property of this output class supports a new `Code` value.

ConnectApi.RelatedFeedPost (Beta)

This new output class is a subclass of `ConnectApi.ActorWithId` and a superclass of `ConnectApi.RelatedQuestion`. It has these properties.

- `score`—Score of the related feed post that indicates how closely related it is to the context feed post.
- `title`—Title of the related feed post.

ConnectApi.RelatedFeedPosts (Beta)

This new output class has one property, `relatedFeedPosts`, which is a collection of related feed posts.

ConnectApi.RelatedQuestion (Beta)

This new output class is a subclass of `ConnectApi.RelatedFeedPost`. It has one property, `hasBestAnswer`, which indicates whether the question has a best answer.

ConnectApi.StatusCapability (Beta)

This new output class is a subclass of `ConnectApi.FeedElementCapability`. It has these properties.

- `feedEntityStatus`—Specifies the status of the feed item. Values are:
 - `PendingReview`—The feed item isn't approved yet and therefore isn't published or visible.
 - `Published`—The feed item is approved and visible.
- `isApprovableByMe`—Specifies whether the current user can change the status of the feed item from `PendingReview` to `Published`.

Groups

ConnectApi.Photo

The new `mediumPhotoUrl` property is the URL to the medium size (default width is 160 pixels) group photo.

Mobile

ConnectApi.Features

This output class has these new properties.

- `offlineEditEnabled`—Specifies whether the offline object permissions are enabled for Salesforce1 downloadable app mobile clients.

Recommendations

ConnectApi.ArticleSummary

This new output class is a subclass of `ConnectApi.ActorWithId`. It has these properties.

- `articleType`—Type of the knowledge article.
- `lastPublishedDate`—Last published date of the knowledge article.
- `rating`—The rating of the article.
- `summary`—Summary of the knowledge article contents.
- `title`—Title of the knowledge article.
- `urlName`—URL name of the knowledge article.

User Profiles

ConnectApi.Photo

The new `mediumPhotoUrl` property is the URL to the medium size (default width is 160 pixels) profile photo.

New and Changed Chatter in Apex Enums

For complete information about these enums, see `ConnectApi` Enums in *Apex Developer Guide*.

ConnectApi.DigestPeriod

This new enum specifies the period of time included in a Chatter email digest.

- `DailyDigest`—The email includes up to the 50 latest posts from the previous day.
- `WeeklyDigest`—The email includes up to the 50 latest posts from the previous week.

ConnectApi.FeedElementCapabilityType

This enum has these new values.

- `Interactions`—The feed element has information about user interactions.
- `Status`—The feed element has a status that determines its visibility.

ConnectApi.FeedEntityStatus

This new enum has these values.

- `PendingReview`—The feed item isn't approved yet, and therefore isn't published or visible.
- `Published`—The feed item is approved and visible.

ConnectApi.MarkupType

This enum has one new value, `Code`, which is a code tag.

ConnectApi.RecommendationExplanationType

This enum has these new values.

- `ArticleViewedTogether`—Articles often viewed together with the record that the context user just viewed.
- `ArticleViewedTogetherWithViewers`—Articles often viewed together with other records that the context user views.

ConnectApi.RecommendationType

This enum has one new value, `articles`, because articles can now be recommended.

ConnectApi.RelatedFeedPostType

This new enum has these values.

- `Answered`—Related questions that have at least one answer.
- `BestAnswer`—Related questions that have a best answer.
- `Generic`—All types of related questions, including answered, with a best answer, and unanswered.
- `Unanswered`—Related questions that don't have answers.

ConnectApi.SocialNetworkProvider

This enum has these new values.

- `Klout`
- `Rypple`

Increased Non-Selective Query Limits

We've increased the Apex non-selective query limit from 100,000 to 200,000 rows.

To avoid long execution times, there is a limit to the number of rows you can query with nonselective SOQL queries. Previously, an error occurred when a non-selective query in a trigger executes against an object that contains more than 100,00 records. That limit has been raised to 200,000 records. A query is selective when one of the query filters is on an indexed field and the query filter reduces the resulting number of rows below a system-defined threshold.

Lightning Components

The Lightning Component framework powers Lightning Experience and Salesforce1. Use the framework to build mobile apps and pages in Lightning Experience, Salesforce1, Salesforce Classic, and Communities. Enhancements in this release are focused on security and supportability with critical releases for LockerService and access-check error enforcement. This release also includes support for the `$Resource` global value provider and enhancements to the Developer Console to make it easier to create components and applications for use in different contexts.

Use out-of-the-box components or build your own components with JavaScript, HTML, CSS, Apex, or any web-enabled code.

The AppExchange for Components provides components created by Salesforce partners, or you can publish your own components.

For more information, refer to the [Lightning Components Developer's Guide](#).

IN THIS SECTION:

[Enforce Access Check Errors \(Critical Update\)](#)

This critical update enforces access check violations for Lightning resources. Previously, the access violations only generated warnings. Improved access check enforcement enables component authors to have greater control over how their components are used.

[Enhance Security with LockerService \(Critical Update\)](#)

LockerService is a powerful new security architecture for Lightning components that is a critical update for this release. LockerService enhances security by isolating individual Lightning components in their own containers. LockerService also promotes best practices that improve the supportability of your code by only allowing access to supported APIs and eliminating access to non-published framework internals.

[Prepare Your Lightning Components for LockerService with the Salesforce Lightning CLI](#)

Use Lightning CLI, a code linting tool, to validate your code for use within the LockerService security architecture. Lightning CLI is a Heroku Toolbelt plugin that lets you scan your code for Lightning-specific issues. This tool is useful for preparing your Lightning code for LockerService enablement.

[Debug Lightning Components with the Salesforce Lightning Inspector](#)

Debugging can be difficult! The Salesforce Lightning Inspector gives you more insight into what's happening under the covers when you're developing Lightning components.

[Create Lightning Components with Configurations in the Developer Console](#)

Configurations make it easier to create a component or application for a specific purpose, like a Lightning Page or Lightning Communities Page, or a navigation item in Lightning Experience or Salesforce1. The New Lightning Bundle panel in the Developer Console offers a choice of component configurations when you create a Lightning component or application bundle.

[Reference Static Resources with the \\$Resource Global Value Provider](#)

The `$Resource` global value provider lets you reference images, style sheets, and JavaScript code you've uploaded in static resources. Using `$Resource` lets you reference assets by name, without worrying about the gory details of URLs or file paths. You can use `$Resource` in Lightning components markup and within JavaScript controller and helper code.

[Lightning Design Tokens \(Generally Available\)](#)

Capture the essential values of your visual design into named tokens. Define the token values once and reuse them throughout your Lightning components CSS resources. Tokens make it easy to ensure that your design is consistent, and even easier to update it as your design evolves.

EDITIONS

Available for use in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Create Lightning components using the UI in **Enterprise, Performance, Unlimited, Developer** Editions or a sandbox.

[More Intuitive Behavior for Abortable Actions](#)

An abortable action queued to be sent to the server is now aborted if the component that created the action is no longer valid, that is `cmp.isValid() == false`. Previously, an abortable action in the queue was aborted if a subsequent abortable action was added to the queue. The new behavior for aborting actions is more intuitive and predictable because the only factor for aborting actions is the component that creates the action.

[Improve App-Level Messaging with Powerful, Accessible Toasts](#)

Jazz up your app's popup messaging with new attributes on the `force:showToast` API event. The new toasts entity is designed for mobile and desktop apps, and includes support for new features and enhanced user interface design. Salesforce provides this attribute to surface enhanced toasts in Lightning Experience and the Salesforce1 mobile browser app.

[Other Changes in Lightning Components](#)

We've made additional changes in Lightning Components.

[New and Changed Lightning Components](#)

These components are new or have changed.

[Changed Lightning Events](#)

These events have changed.

Enforce Access Check Errors (Critical Update)

This critical update enforces access check violations for Lightning resources. Previously, the access violations only generated warnings. Improved access check enforcement enables component authors to have greater control over how their components are used.

In Spring '16, we warned you that stricter enforcement was coming in Summer '16. That day has now arrived with this critical update, which lets you test the new behavior, but also gives you time to fix any access check errors.

You can control access to Lightning resources via the `access` system attribute. This critical update enforces access check violations for `access` on these tags:

- `<aura:application>`
- `<aura:attribute>`
- `<aura:component>`
- `<aura:interface>`

 **Note:** Access check failures for `<aura:event>` and `<aura:method>` tags aren't enforced yet and aren't covered by this critical release. They show up as warnings in your browser console if you've enabled debug mode. The framework will enforce the `<aura:event>` and `<aura:method>` access checks more strictly in a later release so you shouldn't ignore them.

The default value for Lightning resources is `access="public"`, which means the resources are available only within the same namespace.

This sample component has global access.

```
<aura:component access="global">
  ...
</aura:component>
```

Access Violations

If your code accesses a resource, such as a component or attribute, that doesn't have an `access` system attribute allowing you to access it, the code doesn't execute or returns `undefined`. You also see an error message in your browser console if you enabled

debug mode. Access check enforcement is a critical update in this release. If you don't update it, you continue to see warning messages in the browser console instead of errors.

Fixing Access Check Errors

You can fix access check errors using one or more of these techniques.

- Add appropriate `access` system attributes to the resources that you own.
- Remove references in your code to resources that aren't available. In the earlier example, `markup://c:targetComponent` doesn't have an access value allowing `markup://c:sourceComponent` to access it.
- Ensure that any attribute that you're accessing exists by looking at its `<aura:attribute>` definition. Confirm that you're using the correct case-sensitive spelling for the `name`.

Accessing an undefined attribute or an attribute that is out of scope, for example a private attribute, triggers the same access violation message. The access context doesn't know whether the attribute is undefined or inaccessible.

Activate the Critical Update

We recommend that you test this update in a sandbox or Developer Edition org to verify correct behavior before enabling it in your production org.

To activate this critical update:

1. From Setup, enter *Critical Updates* in the `Quick Find` box, and then select **Critical Updates**.
2. For "Enforce Lightning Components Access Checks", click **Activate**.

For more information about the `access` system attribute, see the [Lightning Components Developer Guide](#).

Enhance Security with LockerService (Critical Update)

LockerService is a powerful new security architecture for Lightning components that is a critical update for this release. LockerService enhances security by isolating individual Lightning components in their own containers. LockerService also promotes best practices that improve the supportability of your code by only allowing access to supported APIs and eliminating access to non-published framework internals.

LockerService Requirements

LockerService enforces several security features in your code.

JavaScript ES5 Strict Mode Enforcement

JavaScript ES5 strict mode is implicitly enabled. You don't need to specify `"use strict"` in your code. Enforcement includes declaration of variables with the `var` keyword and other JavaScript coding best practices. The libraries that your components use must also work in strict mode.

DOM Access Containment

A component can only traverse the DOM and access elements created by that component. This behavior prevents the anti-pattern of reaching into DOM elements owned by other components.

Restrictions to Global References

LockerService applies restrictions to global references. You can access intrinsic objects, such as `Array`. LockerService provides secure versions of non-intrinsic objects, such as `window`. The secure object versions automatically and seamlessly control access to the object and its properties.

Use the Salesforce Lightning CLI tool to scan your code for Lightning-specific issues.

Access to Supported JavaScript API Framework Methods Only

You can access published, supported JavaScript API framework methods only. These methods are published in the reference doc app at <https://yourDomain.lightning.force.com/auradocs/reference.app>. Previously, unsupported methods were accessible, which exposed your code to the risk of breaking when unsupported methods were changed or removed.

The preceding security features are enforced when LockerService is active in your org. LockerService is a critical update for this release. LockerService will be automatically activated for all orgs in the Spring '17 release. Before the Spring '17 release, you can manually activate and deactivate the update as often as you need to evaluate the impact on your org.

In a future release, LockerService will be extended to cover additional security features.

Stricter Content Security Policy (CSP)

LockerService will tighten CSP to eliminate the possibility of cross-site scripting attacks by disallowing the `unsafe-inline` and `unsafe-eval` keywords for inline scripts (`script-src`). As a best practice, eliminate use of these keywords in your code, and update third-party libraries to modern versions that don't depend on `unsafe-inline` or `unsafe-eval`.

 **Note:** IE11 doesn't support CSP, so we recommend using other supported browsers for enhanced security.

These CSP changes aren't enforced by LockerService currently, but it's worth planning ahead. The Salesforce Lightning CLI tool reports issues that are enforced by LockerService today, as well as issues that aren't enforced today, but which are planned to be enforced in the future.

Don't Use `instanceof`

When LockerService is enabled, the `instanceof` operator is unreliable due to the potential presence of multiple windows or frames. To determine a variable type, use `typeof` or a standard JavaScript method, such as `Array.isArray()`, instead.

Activate the Critical Update

LockerService is a critical update for this release. LockerService will be automatically activated for all orgs in the Spring '17 release. Before the Spring '17 release, you can manually activate and deactivate the update as often as you need to evaluate the impact on your org.

To activate this critical update:

1. From Setup, enter *Critical Updates* in the *Quick Find* box, and then select **Critical Updates**.
2. For "Enable Lightning LockerService Security", click **Activate**.
3. Refresh your browser page to proceed with LockerService enabled.

 **Note:** LockerService is automatically enabled for:

- New orgs created after the Summer '16 release
- All existing orgs with no custom Lightning components

If you don't see this critical update in your org, LockerService has been automatically enabled and can't be disabled. Automatic enablement occurs within 24 hours after the release.

You can disable LockerService in a Developer Edition org created after the Summer '16 release. We recommend that you test LockerService in a Developer Edition org to verify correct behavior of your components before enabling it in your production org.

Components Installed from Managed Packages

If the critical update is not visible, there is an exception for this release for components installed from a managed package. These components continue to run without enforcement of LockerService restrictions.

If the critical update isn't visible, components that you create in your org run with enforcement of LockerService restrictions. Components created in your org are in the default namespace, `c`, or in your org's namespace, if you created a namespace.

This exception is just for this release. When LockerService is enabled for all orgs, it will be enforced for all Lightning components.

Here's a table summarizing when LockerService is enforced.

Component Source	Critical Update Visible and Not Activated	Critical Update Visible and Activated	Critical Update Not Visible
Managed package	No	Yes	No
Created in your org	No	Yes	Yes

SEE ALSO:

[Prepare Your Lightning Components for LockerService with the Salesforce Lightning CLI](#)

Prepare Your Lightning Components for LockerService with the Salesforce Lightning CLI

Use Lightning CLI, a code linting tool, to validate your code for use within the LockerService security architecture. Lightning CLI is a Heroku Toolbelt plugin that lets you scan your code for Lightning-specific issues. This tool is useful for preparing your Lightning code for LockerService enablement.

Lightning CLI is a linting tool based on the open source ESLint project. Like ESLint, it flags issues it finds in your code. Lightning CLI alerts you to specific issues related to LockerService. Issues that are flagged include incorrect Lightning components code, use of unsupported or private Lightning APIs, and a number of general JavaScript coding issues. Lightning CLI installs into the Heroku Toolbelt, and is used on the command line.

For details on use and installation, see the *Lightning Components Developer Guide*.

SEE ALSO:

[Enhance Security with LockerService \(Critical Update\)](#)

[Lightning Components Developer Guide: Salesforce Lightning CLI](#)

[ESLint Project](#)

Debug Lightning Components with the Salesforce Lightning Inspector

Debugging can be difficult! The Salesforce Lightning Inspector gives you more insight into what's happening under the covers when you're developing Lightning components.

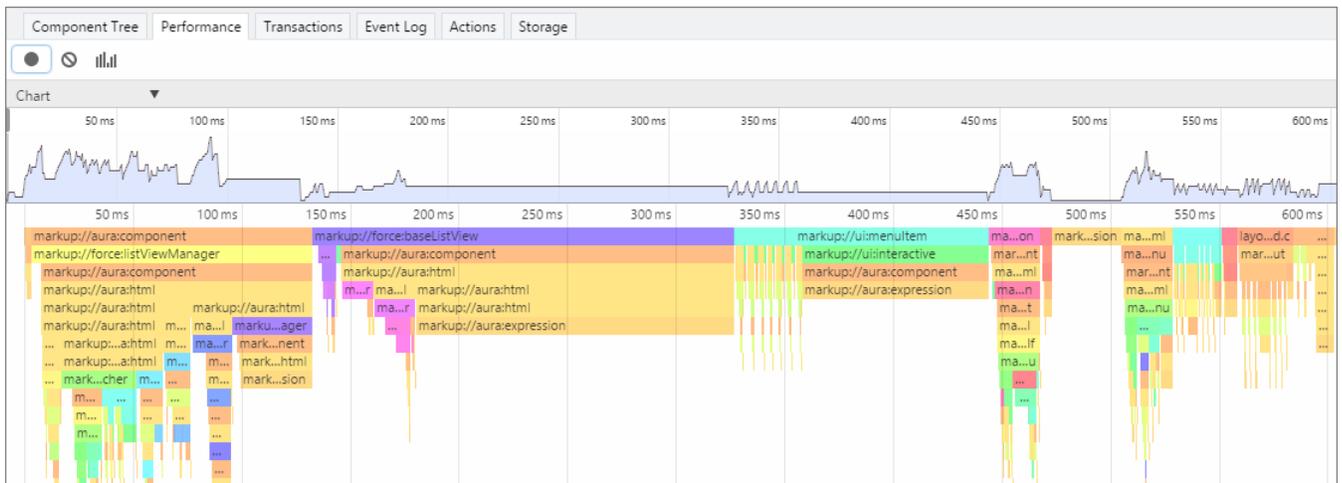
The Salesforce Lightning Inspector is a Google Chrome DevTools extension that helps you debug Lightning components and profile component performance.

We released this extension in February 2016. Check it out if you haven't seen it already!

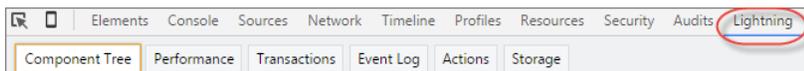
The extension helps you to:

- Navigate the component tree in your app, inspect components and their associated DOM elements.
- Identify performance bottlenecks by looking at a graph of component creation time.
- Debug server interactions faster by monitoring and modifying responses.
- Test the fault tolerance of your app by simulating error conditions or dropped action responses.

- Track the sequence of event firing and handling for one or more actions.



The Chrome extension adds a Lightning tab to the DevTools menu. Use the sub tabs to inspect different aspects of your app.



For details on use and installation, see the [Lightning Components Developer Guide](#).

Create Lightning Components with Configurations in the Developer Console

Configurations make it easier to create a component or application for a specific purpose, like a Lightning Page or Lightning Communities Page, or a navigation item in Lightning Experience or Salesforce1. The New Lightning Bundle panel in the Developer Console offers a choice of component configurations when you create a Lightning component or application bundle.

Using configurations is optional. You can use them in any combination, including all or none.

Configurations add the interfaces required to support using the component in the desired context. For example, when you choose the **Lightning Tab** configuration, your new component includes `implements="force:appHostable"` in the component stub.

New Lightning Bundle

Name:

Description:

Component Configuration

Create bundle with any of the following configurations (optional)

- Lightning Tab
- Lightning Page
- Lightning Record Page
- Lightning Communities Page

Submit

One configuration is available for Lightning application bundles. The **Lightning Out Dependency App** configuration creates an empty Lightning Out dependency app. It adds `extends="ltng:outApp"` to the generated app stub.

The following configurations are available for creating a component.

- **Lightning Tab**—Creates a component for use as a navigation element in Lightning Experience or Salesforce1. Adds `implements="force:appHostable"` to the generated component stub.
- **Lightning Page**—Creates a component for use in Lightning Pages or the Lightning App Builder. Adds `implements="flexipage:availableForAllPageTypes"` and `access="global"` to the generated component stub.
- **Lightning Record Page**—Creates a component for use on a record home page in Lightning Experience. Adds `implements="flexipage:availableForRecordHome,force:hasRecordId"` and `access="global"` to the generated component stub.
- **Lightning Communities Page**—Creates a component that's available for drag and drop in the Community Builder. Adds `implements="forceCommunity:availableForAllPageTypes"` and `access="global"` to the generated component stub.

For more details on creating components of the various types, see the *Lightning Components Developer Guide*.

SEE ALSO:

[Lightning Components Developer Guide: Add Lightning Components to Lightning Experience](#)

[Lightning Components Developer Guide: Configure Components for Lightning Pages and the Lightning App Builder](#)

[Lightning Components Developer Guide: Configure Components for Lightning Experience Record Home Pages](#)

[Lightning Components Developer Guide: Configure Components for Communities](#)

Reference Static Resources with the `$Resource` Global Value Provider

The `$Resource` global value provider lets you reference images, style sheets, and JavaScript code you've uploaded in static resources. Using `$Resource` lets you reference assets by name, without worrying about the gory details of URLs or file paths. You can use `$Resource` in Lightning components markup and within JavaScript controller and helper code.

To reference a specific resource in component markup, use `$Resource.resourceName` within an expression. Include CSS style sheets or JavaScript libraries into a component using the `<ltng:require>` tag. To obtain a reference to a static resource in JavaScript code, use `$A.get(' $Resource.resourceName')`.

For more information and examples, see the *Lightning Components Developer Guide*.

SEE ALSO:

[Lightning Components Developer Guide: `\$Resource`](#)

[Salesforce Help: Static Resources](#)

Lightning Design Tokens (Generally Available)

Capture the essential values of your visual design into named tokens. Define the token values once and reuse them throughout your Lightning components CSS resources. Tokens make it easy to ensure that your design is consistent, and even easier to update it as your design evolves.

In the previous release, design tokens were available as a developer preview. We're excited to let you know they're now generally available, and enabled for all orgs.

In addition, you can create more than one tokens file in an org. We're even letting you name them something besides "defaultTokens"...but only tokens defined in `defaultTokens` are available to your Lightning components. Go wild...within the naming constraints of all Lightning bundles. OK, so it's not an open bar and jell-o shots. It's still a party.

Create additional tokens bundles to contain logical groups of tokens. Then pull them into `defaultTokens` using the `extends` attribute. This lets you treat your additional tokens bundles just like standard tokens.

SEE ALSO:

[Lightning Components Developer Guide: Styling with Design Tokens](#)

More Intuitive Behavior for Abortable Actions

An abortable action queued to be sent to the server is now aborted if the component that created the action is no longer valid, that is `cmp.isValid() == false`. Previously, an abortable action in the queue was aborted if a subsequent abortable action was added to the queue. The new behavior for aborting actions is more intuitive and predictable because the only factor for aborting actions is the component that creates the action.

An abortable action is sent to the server and executed normally unless the component that created the action is invalid before the action is sent to the server. If the component that created the action is invalid, the action state is set to `ABORTED`.

A non-abortable action is always sent to the server and can't be aborted in the queue.

If an action response returns from the server and the associated component is now invalid, the logic has been executed on the server but the action state is set to `ABORTED`. This is true whether or not the action is marked as abortable. If the action state is set to `ABORTED`, only the callback logic associated with the `ABORTED` state (`action.getState() === "ABORTED"`) will be executed. This enables components to optionally log a message or clean up if they had an aborted action.

Improve App-Level Messaging with Powerful, Accessible Toasts

Jazz up your app's popup messaging with new attributes on the `force:showToast` API event. The new toasts entity is designed for mobile and desktop apps, and includes support for new features and enhanced user interface design. Salesforce provides this attribute to surface enhanced toasts in Lightning Experience and the Salesforce1 mobile browser app.

EDITIONS

Available in all editions

Enhanced toast development means friendlier, more flexible messaging.

- One toast can now provide multiple actions for the user. Previously, there was only one action per toast.
- You can use pre-configured toasts or customize the styling of your toast messages.
- When multiple toasts are generated, they stack so that the user can address them consecutively.

 **Note:** Toasts currently stack only in Lightning Experience.

- Messages are fully accessible.

There are no changes to component-level toasts.

 **Note:** The `force:hideToast` event doesn't work with the new toasts.

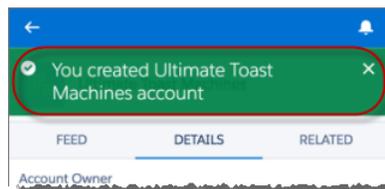
Stacking Toast Messages



Toast Message with Multiple Actions



Toast Message in the Salesforce1 Mobile Browser App



For information and examples of `force:showToast`, see the *Lightning Components Developer Guide*.

Other Changes in Lightning Components

We've made additional changes in Lightning Components.

IN THIS SECTION:

[More Readable Styling Markup with the join Expression](#)

Markup can get messy when you specify the class names to apply based on the component attribute values. Try using a `join` expression for easier-to-read markup.

[Use Standard JavaScript Methods Instead of instanceof](#)

The `instanceof` operator is unreliable due to the potential presence of multiple windows or frames. To determine a variable type, use `typeof` or a standard JavaScript method, such as `Array.isArray()`, instead.

[Picklists Have an Updated Look](#)

Picklists in Lightning Experience have been updated to match the look and feel of other menus in the UI.

More Readable Styling Markup with the `join` Expression

Markup can get messy when you specify the class names to apply based on the component attribute values. Try using a `join` expression for easier-to-read markup.

This example sets the class names based on the component attribute values. It's readable, but the spaces between class names are easy to forget.

```
<li class="{! 'calendarEvent ' +
  v.zoomDirection + ' ' +
  (v.past ? 'pastEvent ' : '') +
  (v.zoomed ? 'zoom ' : '') +
  (v.multiDayFragment ? 'multiDayFragment ' : '')}">
  <!-- content here -->
</li>
```

Sometimes, if the markup is not broken into multiple lines, it can hurt your eyes or make you mutter profanities under your breath.

```
<li class="{! 'calendarEvent ' + v.zoomDirection + ' ' + (v.past ? 'pastEvent ' : '') +
  (v.zoomed ? 'zoom ' : '') + (v.multiDayFragment ? 'multiDayFragment ' : '')}">
  <!-- content here -->
</li>
```

Try using a `join` expression instead for easier-to-read markup. This example `join` expression sets `' '` as the first argument so that you don't have to specify it for each subsequent argument in the expression.

```
<li
  class="{! join(' ',
    'calendarEvent',
    v.zoomDirection,
    v.past ? 'pastEvent' : '',
    v.zoomed ? 'zoom' : '',
    v.multiDayFragment ? 'multiDayFragment' : ''
  )}">
  <!-- content here -->
</li>
```

You can also use a `join` expression for dynamic styling.

```
<div style="{! join(';',
  'top:' + v.timeOffsetTop + '%',
  'left:' + v.timeOffsetLeft + '%',
  'width:' + v.timeOffsetWidth + '%'
)}">
```

```
<!-- content here -->
</div>
```

Use Standard JavaScript Methods Instead of `instanceof`

The `instanceof` operator is unreliable due to the potential presence of multiple windows or frames. To determine a variable type, use `typeof` or a standard JavaScript method, such as `Array.isArray()`, instead.

Picklists Have an Updated Look

Picklists in Lightning Experience have been updated to match the look and feel of other menus in the UI.

New and Changed Lightning Components

These components are new or have changed.

New Components

The following component is new.

auraStorage:init

Use this component to initialize storage in your app's template for caching server-side action response values.

Changed Components

ui:inputCurrency

When you enter a number into a currency field you can use the shortcuts k, m, b, or t to indicate thousands, millions, billions, or trillions. For example, entering 100k appears as 100,000. However, these shortcuts are not supported in filter criteria.

ui:inputDate

This component renders a native date picker on Android and iOS mobile phones and tablets. Web apps running on mobile phones and tablets use an input field of type `date`. This change doesn't apply to Windows mobile phones and tablets or to web apps viewed in Internet Explorer.

The `value` attribute has been changed from type `Date` to type `String`, which corresponds to a date in the format `yyyy-mm-dd`.

ui:inputDateTime

This component renders a native date and time picker on Android and iOS mobile phones and tablets. Web apps running on mobile phones and tablets use an input field of type `datetime-local`. This change doesn't apply to Windows mobile phones and tablets or to web apps viewed in Internet Explorer.

The `value` attribute has been changed from type `Date` to type `String`, which corresponds to the UTC date and time format.

ui:inputNumber

Numbers are automatically formatted after you enter them. For example, entering 50000 appears as 50,000. Also, when you enter a number you can use the shortcuts k, m, b, or t to indicate thousands, millions, billions, or trillions. For example, entering 100k appears as 100,000. However, these shortcuts are not supported in filter criteria.

ui:menuList

The right and left arrow keys no longer move through menu items. To move through menu items using your keyboard, use the down and up arrow keys.

ui:menuTriggerLink

The `title` attribute is no longer used as hidden text for assistive technologies.

ui:outputRichText

This component displays URLs and email addresses within rich text fields as hyperlinks.

ui:outputTextArea

This component displays URLs and email addresses within multiline plaintext fields as hyperlinks.

Changed Lightning Events

These events have changed.

force:showToast

Displays a toast notification with a message. The following attribute is now required.

message

Specifies the message to display.

The following attributes are now global.

mode

The toast mode, which controls how users can dismiss the toast. The default is `dismissible`, which displays the close button.

Valid values:

- `dismissible`: Remains visible until you press the close button or `duration` has elapsed, whichever comes first.
- `pester`: Remains visible until `duration` has elapsed. No close button is displayed.
- `sticky`: Remains visible until you press the close buttons.

type

The toast type, which can be `error`, `warning`, `success`, or `info`. The default is `other`, which is styled like an `info` toast and doesn't display an icon, unless specified by the `key` attribute.

API

We've expanded our APIs across the board by adding data and tooling objects, metadata types, REST resources, and SOSL statements in API version 37.0. We've also enhanced existing objects, REST resources, SOAP calls, and support for industry standards, such as cross-origin resource sharing (CORS).

EDITIONS

Available in: **Developer**, **Enterprise**, **Unlimited**, and **Performance** Editions

IN THIS SECTION:

[WSDL Changes to Prepare for Extended Error Codes](#)

If you examine your org's WSDL files, you might notice that we've changed the `Error` and `ApiFault` elements and added a couple new elements, `ExtendedErrorCode` and `ExtendedErrorDetails`. We did this to prepare for the addition of extended error codes in future releases. These codes will provide specific error details, helping you pinpoint and squash annoying API errors. Don't worry, the changes won't break your existing code.

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[SOSL](#)

Salesforce Object Search Language (SOSL) includes two new statements, localized formatting for numerical fields, and expanded support for aliasing.

[REST API](#)

REST API includes several new and changed resources.

[SOAP API](#)

SOAP API includes changed calls and changed headers.

[Chatter REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. In this release, you can include code blocks in your feed posts, get article recommendations, clean your records, and more.

[Reports and Dashboards REST API](#)

Reports and Dashboards REST API enhancements let you get report data and give you access to dashboard metadata and dashboard components.

[Bulk API](#)

Bulk API includes support for cross-origin resource sharing (CORS) and enhancements for BigObjects.

[Streaming API](#)

Streaming API includes Durable PushTopic Streaming and filters for PushTopic subscriptions.

[Tooling API](#)

Tooling API includes new namespaces, new and changed objects, and changed behavior.

[Metadata API: New and Changed Types](#)

Metadata API includes new and changed types and fields.

[Salesforce Console API \(Integration Toolkit\)](#)

The toolkit includes new and updated methods that let you customize a console programmatically. This feature is available in Salesforce Classic only.

WSDL Changes to Prepare for Extended Error Codes

If you examine your org's WSDL files, you might notice that we've changed the Error and ApiFault elements and added a couple new elements, ExtendedErrorCode and ExtendedErrorDetails. We did this to prepare for the addition of extended error codes in future releases. These codes will provide specific error details, helping you pinpoint and squash annoying API errors. Don't worry, the changes won't break your existing code.

New and Changed Objects

Access more data through these new and changed standard objects.

IN THIS SECTION:

[New Objects](#)

These objects are new.

[Changed Objects](#)

These objects have changed.

New Objects

These objects are new.

AccountContactRelation

Represents a relationship between a contact and one or more accounts.

ApexTestResultLimits

Captures the Apex test limits used for a particular test method execution. An instance of this object is associated with each ApexTestResult object.

ApexTestRunResult

Contains summary information about all the test methods that were run in a particular Apex job.

BackgroundOperationResult

Stores error messages generated when importing data into a BigObject, using the Bulk API.

DataAssessmentFieldMetric

Represents summary statistics for matched, blank, and differing fields in account records of an org compared to records in Data.com.

DataAssessmentMetric

Represents a summary of statistics for fields matched and unmatched in your account records with Data.com account records.

DataAssessmentValueMetric

Summarizes the number of fields matched for your account records with Data.com account records.

EmailMessageRelation

Represents a relationship between an EmailMessage and one or more records including contacts, leads, users, and person accounts. This object is available in organizations with Enhanced Email enabled (the default) or that use Email to Case. For more information, see [Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#).

EntityMilestone

Represents a milestone—a required step in a customer support process—on a record. In Summer '16, object milestones are supported only for work orders.

FlowInterviewOwnerSharingRule

Represents the rules for sharing a FlowInterview with users other than the owner. This object is available in API version 33.0 and later.

FlowInterviewShare

Represents a sharing entry on a FlowInterview. This object is available in API version 33.0 and later.

LinkedArticle

Represents a Knowledge article that is attached to a record. In Summer '16, linked articles can be attached only to work orders and work order line items.

LinkedArticleFeed

Represents a single feed item on a linked Knowledge article.

LinkedArticleHistory

Represents the history of changes made to tracked fields on a linked Knowledge article.

PresenceConfigDeclineReason

Represents the settings for a decline reason that a presence user provides when declining work.

PresenceDeclineReason

Represents an Omni-Channel decline reason that agents can select when declining work requests.

SessionPermSetActivation

(Session-Based Permission Sets is currently available as a Developer Preview.)

 **Important:** Managed packages with permission sets that require session activation cannot be installed on customer orgs without this feature.

The SessionPermSetActivation object represents a permission set assignment activated during an individual user session. When a SessionPermSetActivation object is inserted into a permission set, an activation event fires, allowing the permission settings to apply to the user's specific session.

TwoFactorMethodsInfo

Stores information about which identity verification methods a user has registered.

TwoFactorTempCode

Stores information about a user's temporary identity verification code.

Changed Objects

These objects have changed.

Changed Objects That Affect Earlier API Versions

These objects have changed in API version 37.0 and affect earlier API versions.

SignupRequest

The SignupRequest object's `Edition` field, which sets the edition template for Trialforce Source Organization (TSO) orgs, has these changes.

- Group Edition is no longer an option.
- For clarity, Trialforce versions of Enterprise and Professional Edition have been renamed to Enterprise TSO and Professional TSO.
- Sales Professional and Service Enterprise Editions have been added.

User

The User object has a new field.

- The `UserPreferencesSortFeedByComment` field specifies the data value used in sorting a user's feed. When `true`, the feed is sorted by most recent comment activity. When `false`, the feed is sorted by post date.

Changed Objects

These objects have changed in API version 37.0.

ObjectFeed

Five content fields have been removed from all feed objects. To associate content with a feed, use FeedAttachment instead.

- `ContentData`
- `ContentDescription`
- `ContentFileName`
- `ContentSize`
- `ContentType`

Information about content that was previously available on the object feed can be retrieved from ContentVersion.

AccountTeamMember

The `layoutable` attribute is now true.

The field `AccountAccessLevel` is now creatable and updateable.

The AccountTeamMember object has five new fields.

- The `CaseAccessLevel` field represents the team member's access level to cases related to the account.
- The `ContactAccessLevel` field represents the team member's access level to contacts related to the account.
- The `OpportunityAccessLevel` field represents the team member's access level to opportunities related to the account.
- The `PhotoUrl` field represents the team member's user profile image.
- The `Title` field represents the team member's title.

AccountShare

If an account is shared with a user because the user is on the account team, the account always has a separate sharing record for that user. The sharing record's RowCause value is `Team`. Previously, if a user had access to an account for one or more of the following RowCause values, the records in the AccountShare object were compressed into one record with the highest level of access.

- `ImplicitParent`
- `Manual`
- `Owner`
- `Team`

ActivityHistory

The ActivityHistory object has a new field.

`AlternateDetailId`—The ID of a record the activity is related to which contains more details about the activity. For example, an activity can be related to an EmailMessage record.

ApiEvent

The `RecordData` field was added to the ApiEvent object. `RecordData` stores a JSON string that represents the metadata of records queried in an org. This metadata includes the number of results of a query per entity type and the entity IDs. This field is available as part of the Record ID pilot program.

AgentWork

The AgentWork object has three new fields.

- `ActiveTime`—The amount of time an agent actively worked on the work item. Tracks when the item is open and in focus in the agent's console.
- `DeclineReason`—The provided reason for why an agent declined the work request.
- `HandleTime`—The amount of time the work item was in an open status. Calculated by `Closed Time - Accepted Time`.

ApexTestQueueItem

The ApexTestQueueItem object has a new field.

`TestRunResultId`—The ID of the associated ApexTestRunResult object.

ApexTestResult

The ApexTestResult object has two new fields.

- `ApexTestRunResultId`—The ID of the ApexTestRunResult that represents the entire test run.
- `RunTime`—The time it took the test method to run, in seconds.

In addition, you can now create, delete, and update ApexTestResult objects, and all fields on the ApexTestResult object are now creatable and updateable.

Asset

The `AssetRootId` field was renamed to `RootAssetId`.

Community (Zone)

The Community (Zone) object has four new fields.

- `CanCreateCase`—Indicates whether users can ask private questions in the zone. It's represented in the user interface by an **Enable Private Questions** option on the zone detail page.
- `DataCategoryName`—The data category associated with the zone. It's represented in the user interface by a **Data Category for Top-Level Topics** option on the zone detail page.
- `HasChatterService`—Indicates whether Chatter Answers is available in the zone. It's represented in the user interface by an **Enable for Chatter Answers** option on the zone detail page.

- `IsPublished`—Indicates whether the zone is available in portals. It's represented in the user interface by a **Show in Portal** option on the zone detail page.

AuthSession

This object has a new field.

`IsCurrent`—If `true`, the session is a member of the user's current session family.

CollaborationGroup

Collaboration Group object has one new field.

- `MediumPhotoUrl`—The URL for the larger, cropped photo size.

ContractLineItem

The Contract Line Item object has two new fields that let you make one contract line item the parent of another.

- `ParentContractLineItemId`—Represents a contract line item's parent line item. You can also use the Child Contract Line Items related list on line item layouts to create child line items.
- `RootContractLineItemId`—(Read only) Represents the top-level line item in a contract line item hierarchy. Depending on where a contract line item lies in the hierarchy, its root could be the same as its parent.

DatacloudCompany

This object has new fields.

- `FullAddress`—The complete address of a company, including street, city, state, and zip.
- `SicCodeDesc`—The SIC numeric code and description for a company.
- `Website`—The standard URL for a company's home page.

DashboardComponent

The DashboardComponent object has a new field.

- `CustomReportId`—The ID of the report that provides data for the dashboard component. Requires the user permission "Manage Private Reports and Dashboards."

EmailMessage

These changes apply to organizations with Enhanced Email enabled (the default) or that use Email to Case. For more information, see [Improve Email in Salesforce with Features that Drive Business Processes and a Better Email Detail Page](#).

The EmailMessage object has the following new fields:

- `ToIds`—A string array of IDs for contacts, leads, and users who were sent the email message. Each ID is linked to an `EmailMessageRelation` record, which represents the relationship between an email message and a Contact, Lead, or User record.
- `CcIds`—A string array of IDs for contacts, leads, and users who were sent a carbon copy of the email message. Each ID is linked to an `EmailMessageRelation` record, which represents the relationship between an email message and a Contact, Lead, or User record.
- `BccIds`—A string array of IDs for contacts, leads, and users who were sent a blind carbon copy of the email message. Each ID is linked to an `EmailMessageRelation` record, which represents the relationship between an email message and a Contact, Lead, or User record.
- `RelatedToId` — The `RelatedToId` represents nonhuman objects such as accounts, opportunities, campaigns, cases, or custom objects. `RelatedTolds` are polymorphic. Polymorphic means a `RelatedToId` is equivalent to the ID of a related object. The label is `Related To ID`.

The `Status` field is now updateable.

The following attributes of the EmailMessage object have changed:

- The `layoutable` attribute is now `true`.

- The `updateable` attribute is now true.

EventLogFile

The `EventLogFile` object has the following new fields:

- `Interval`—Reserved for future use.
- `Sequence`—Reserved for future use.

Two new values were added to the `Login` event type.

- `CIPHER_SUITE`—The TLS cipher suite used for the login. Values are OpenSSL-style cipher suite names, with hyphen delimiters. For more information, see [OpenSSL Cryptography and SSL/TLS Toolkit](#).
- `TLS_PROTOCOL`—The TLS protocol used for the login.

A new `Console` value was added to the `EventType` field on `EventLogFile`. Console events contain information about the performance and use of Salesforce service consoles.

FeedComment

The `FeedComment` object has a new field.

`SystemModstamp`—(Read only) A [system field](#) that stores date and time values for each record.

FeedItem

The `FeedItem` object has a new field.

`Status`—Specifies whether a feed item is published and visible to all who have access to the feed.

 **Note:** This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

LiveChatTranscript

The `LiveChatTranscript` object has a new field.

- `VisitorNetwork`—The network or service provider the chat visitor used for the chat.

LoginHistory

This object's access rules have changed. Users without the "Manage Users" permission can now access their own login history records. The object also has three new fields.

- `CipherSuite`—The TLS cipher suite used for the login. Values are OpenSSL-style cipher suite names, with hyphen delimiters. For more information, see [OpenSSL Cryptography and SSL/TLS Toolkit](#).
- `CountryIso`—The ISO 3166 code for the country where the user's IP address is physically located. For more information, see [Country Codes - ISO 3166](#)
- `TlsProtocol`—The TLS protocol used for the login.

NavigationMenuItem

The `NavigationMenuItem` object has a new field.

`TargetPrefs`—If `Type` is `ExternalLink`, determines whether a navigation menu item opens in the same tab.

Network

The `Network` object has a new field.

`OptionsAllowInternalUserLogin`—Specifies whether internal users can log in with their internal credentials on the community login page.

NetworkActivityAudit

The `Action` picklist field includes new values.

- `ModerationRuleReview`—A moderation rule sent member-generated content to be reviewed and approved by a moderator.
- `ModerationRuleFreeze`—A moderation rule froze a member because they created content too frequently within a specific time frame.
- `ModerationRuleNotify`—A moderation rule notified moderators because a member created content too frequently within a specific time frame.

In addition, the `NetworkActivityAudit` object now tracks `ContentVersion` records.

OpenActivity

The `OpenActivity` object has a new field.

`AlternateDetailId`—The ID of a record the activity is related to which contains more details about the activity. For example, an activity can be related to an `EmailMessage` record.

OpportunityShare

If an opportunity is shared with a user because the user is on the opportunity team, the opportunity always has a separate sharing record for that user. The sharing record's `RowCause` value is `Team`. Previously, if a user had access to an opportunity for one or more of the following `RowCause` values, the records in the `OpportunityShare` object were compressed into one record with the highest level of access.

- `Manual`
- `Owner`
- `Team`

OpportunityTeamMember

The `OpportunityTeamMember` object has one new field.

- The `Title` field represents the team member's title.

PermissionSet

The `PermissionSet` object has a new field:

- `HasActivationRequired`—Indicates whether the permission set requires an associated active session (`true`) or not (`false`).

PresenceUserConfig

The `PresenceUserConfig` object has three new fields.

- `OptionsIsDeclineReasonEnabled`—Indicates whether agents can select a reason for declining work requests.
- `OptionsIsDisconnectSoundEnabled`—Indicates whether a sound is played when agents are disconnected from Omni-Channel.
- `OptionsIsRequestSoundEnabled`—Indicates whether a sound is played with incoming work requests.

Period

The `Period` object has one new field.

- The `FullyQualifiedLabel` field represents the period's complete name in the UI. For example, "September FY 2016".

PermissionSet

The `PermissionSet` object has a new field:

- `HasActivationRequired` Indicates whether the permission set requires an associated active session (`true`) or not (`false`).

ServiceContract

The `Service Contract` object has two new fields that let you make one service contract the parent of another.

- `ParentServiceContractId`—Represents a service contract's parent service contract. You can also use the Child Service Contracts related list on service contract layouts to create child service contracts.
- `RootServiceContractId`—(Read only) Represents the top-level service contract in a service contract hierarchy. Depending on where a service contract lies in the hierarchy, its root could be the same as its parent.

SlaProcess

The new `SOBJECTTYPE` field represents the type of records that the entitlement process can run upon: Case or Work Order. Its label in the user interface is Entitlement Process Type.

TopicAssignment

Topics can now be assigned to files and notes, using the `EntityID` of the `ContentDocument`, and the `TopicID` of the topic. Assigning topics to `ContentDocument` is enabled by default, and requires only read access to the file.

TwoFactorInfo

The `Type` field has a new picklist value, `HOTP`. This value is reserved for future use.

User

The User object has three new fields.

- `UserPreferencesHideEndUserOnboardingAssistantModal`—Reserved for future use.
- `UserPreferencesHideLightningMigrationModal`—Reserved for future use.
- `UserPreferencesHideSfxWelcomeMat`—Controls whether a user sees the Lightning Experience new user message. That message welcomes users to the new interface and provides step-by-step instructions that describe how to return to Salesforce Classic.

VerificationHistory

The following fields have changed.

- `Activity`—A new picklist value, `TempCode`, was added. This value indicates that the user attempted to generate a temporary verification code.
- `VerificationMethod`—Two new picklist values, `HOTP` and `TempCode`, were added. The `HOTP` value is reserved for future use. The `TempCode` value indicates that a user used a temporary verification code to verify identity.

WorkBadgeDefinition

The new `IsRewardBadge` field indicates whether the `WorkBadgeDefinition` is a reward badge (`true`) or not (`false`).

WorkOrder

The `WorkOrder` object has the following new fields:

- `BusinessHoursId`—Represents the business hours that the work order follows.
- `IsClosed`—Indicates whether the work order has been closed.
- `IsStopped`—Indicates whether a milestone on the work order has been paused.
- `RootWorkOrderId`—(Read only) Represents the top-level work order in a work order hierarchy. Depending on where a work order lies in the hierarchy, its root could be the same as its parent.
- `SlaExitDate`—Represents the date the work order exits an entitlement process.
- `SlaStartDate`—Represents the date the work order enters an entitlement process.
- `StopStartDate`—Represents the date a milestone was paused.

WorkOrderLineItem

The new read-only `RootWorkOrderLineItemId` field represents the top-level line item in a work order line item hierarchy. Depending on where a line item lies in the hierarchy, its root could be the same as its parent.

SOSL

Salesforce Object Search Language (SOSL) includes two new statements, localized formatting for numerical fields, and expanded support for aliasing.

IN THIS SECTION:

[Use Aliasing in More Statements](#)

`FORMAT()`, `toLabel()`, and `convertCurrency()` now support aliases. Aliasing provides a way to identify the field when you're processing the query results in your code.

[Apply Localized Formatting to Numerical Fields](#)

Use `FORMAT()` with `FIND` to apply localized formatting to standard and custom number, date, time, and currency fields.

[Return Metadata in Responses](#)

Use `WITH Metadata` to return metadata, such as entity name and label, in the response.

[Filter Product Searches by Price Book ID](#)

Use `WITH PricebookId` to narrow your product search results by a single price book ID.

Use Aliasing in More Statements

`FORMAT()`, `toLabel()`, and `convertCurrency()` now support aliases. Aliasing provides a way to identify the field when you're processing the query results in your code.

For example:

```
FIND {Acme} RETURNING Account(AnnualRevenue, convertCurrency(AnnualRevenue) AliasCurrency)
```

Apply Localized Formatting to Numerical Fields

Use `FORMAT()` with `FIND` to apply localized formatting to standard and custom number, date, time, and currency fields.

For example:

```
FIND {Acme} RETURNING Account(Id, LastModifiedDate, FORMAT(LastModifiedDate) FormattedDate)
```

Return Metadata in Responses

Use `WITH Metadata` to return metadata, such as entity name and label, in the response.

To include metadata in the response, use the `LABELS` value, which returns the display label for the fields returned in search results.

For example:

```
FIND {Acme} RETURNING Account(Id, Name) WITH METADATA='LABELS'
```

An example of the metadata portion of the response:

```
{
  "metadata" : {
    "entityLabelMetadata" : [ {
      "entityName" : "Account",
      "entityFieldLabels" : [ {
        "name" : "Id",
        "value" : "Account ID"
      } ], {
```

```
"name" : "Name",
"value" : "Account Name"
```

Filter Product Searches by Price Book ID

Use `WITH PricebookId` to narrow your product search results by a single price book ID.

For example:

```
Find {laptop} RETURNING Product2 WITH PricebookId = '01sxx000002MffAAE'
```

REST API

REST API includes several new and changed resources.

New Resources: Flows and Flow Interviews (Pilot)

Have you ever wanted to build your own runtime experience for Visual Workflow? Here's your chance. We're providing two resources to describe flows and three resources to describe and manipulate interviews.

 **Note:** The **Flow Runtime REST API** is currently available to select customers through a pilot program. To be nominated to join this pilot program, contact Salesforce. Additional terms and conditions may apply to participate in the pilot program. Please note that pilot programs are subject to change, and as such, we cannot guarantee acceptance into this pilot program or a particular time frame in which this feature can be enabled. Any unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Flows

```
/vXX.X/process/flows
```

Lists active flow definitions in your organization.

Specific Flow

```
/vXX.X/process/flows/FlowName
```

Lists summary information about a specific flow

Paused Interviews

```
/vXX.X/process/interviews
```

Lists paused interviews that the running user can resume.

New Interview

```
/vXX.X/process/interviews/FlowName
```

Starts a flow interview.

Specific Interview

```
/vXX.X/process/interviews/FlowName/guid
```

Continues, pauses, or finishes an in-progress interview, or resumes a paused interview.

SEE ALSO:

[Customize the Look and Feel of Flow Interviews \(Pilot\)](#)

Changed Resources: SOBJect Basic Information, SOBJect Describe, and Describe Global

We added the `mrUEnabled` field to the responses of these resources. This field indicates whether Most Recently Used (MRU) list functionality is enabled for the object (`true`) or not (`false`).

Changed Resource: SOBJect Rows by External ID

As a special case, you can now use this resource to create a record by POSTing to `/vXX.X/subjects/SOBJectName/Id` in API version 37.0 and later. This pattern represents the use of `Id` as the specified external ID field and `null` as the value. It's useful when you're writing code to upsert multiple records by different external IDs and you don't want to request a separate resource.

Changed Resource: Parameterized Search

The resource includes a new wrapper in the response body, support for aliasing and formatting in the `fields` parameter, and two new parameters.

New `searchRecords` wrapper in response body

A new `searchRecords` tag surrounds the content in responses. For example:

```
{
  "searchRecords" : [ {
    "attributes" : {
      "type" : "Contact",
      "url" : "/services/data/v36.0/subjects/Contact/003xx000004TraiAAC"
    },
    "Id" : "003xx000004TraiAAC",
    "FirstName" : "Smith",
    "LastName" : "Johnson"
  }, {
    "attributes" : {
      "type" : "Account",
      "url" : "/services/data/v36.0/subjects/Account/001xx000003DHXnAAO"
    },
    "Id" : "001xx000003DHXnAAO",
    "NumberOfEmployees" : 100
  } ]
}
```

 **Note:** Due to this change, make sure that you can parse the new response syntax before upgrading to API version 37.0.

Aliasing and new `format` function available in `fields` for GET and POST

The `format` function applies localized formatting to standard and custom number, date, time, and currency fields.

Aliasing is supported within `fields` for `toLabel`, `convertCurrency`, and `format`. For example:

```
{
  ...
  "subjects":[ {"name": "Opportunity", "fields":["Id", "format(Amount) AliasAmount"]} ]
}
```

```
...
}
```

New `metadata` parameter

Specifies if metadata is returned in the response. No metadata is returned by default. An example of a response with metadata:

```
{
  "searchRecords" : [ {
    "attributes" : {
      "type" : "Account",
      "url" : "/services/data/v35.0/subjects/Account/001D000000IqhSLIAZ"
    },
    "Id" : "001D000000IqhSLIAZ",
  }, {
    "attributes" : {
      "type" : "Account",
      "url" : "/services/data/v35.0/subjects/Account/001D000000IomazIAB"
    },
    "Id" : "001D000000IomazIAB",
  } ],
  "metadata" : {
    "entityLabelMetadata" : [ {
      "entityName" : "Account",
      "entityFieldLabels" : [ {
        "name" : "Id",
        "value" : "Account ID"
      }, {
        "name" : "Name",
        "value" : "Account Name"
      } ]
    } ]
  } ]
}
```

New `pricebookId` parameter

Filters product search results by a price book ID for only the Product2 object. The price book ID must be associated with the product that you're searching for. For example:

```
?q=laptop&subject=product2&pricebookId=01sxx0000002MffAAE
```

Changed Resource: Relevant Items

We added the `lastUpdatedId` parameter in the response header. The parameter provides a unique code that you can use in subsequent calls to compare the results of a complete result set with the results in this response list. Each new results set has separate `lastUpdatedId` parameters.

For example:

```
lastUpdatedId: 102959935
newResultSetSinceLastQuery: true
```

Changed Resource: SObject Suggested Articles for Case

The `categories` parameter replaces `categoryId`. The `categories` parameter is the named pair of a data category group and a data category API name (not category title) for desired articles. Use the syntax `categories={"Group": "Category"}`. In addition, we added the `topics` parameter, which lists the topic for the returned articles.

New `categories` parameter replaces `categoryId`

Consider encoding characters in the URL. For example:

```
categories=%7B%22Regions%22%3A%22Asia%22%2C%22
Products%22%3A%22Laptops%22%7D
```

For multiple categories, specify multiple pairs of data category groups and data categories. For example:

```
categories={"Regions": "Asia", "Products": "Laptops" }
```

New `topics` parameter

For example, `topics=outlook&topics=email`.

Changed Resource: Search Suggested Article Title Matches

We added the `topics` parameter, which lists the topic for the returned articles.

For example:

```
topics=outlook&topics=email
```

Access Limit Information for Hourly OData Callouts

When you query the Limits resource, it now returns the maximum and remaining hourly OData callouts for your org.

Limits for Industries

You can retrieve a maximum of 200 records in one request instead of the 2,000 records previously documented.

SOAP API

SOAP API includes changed calls and changed headers.

Changed Calls

`describeGlobal()` and `DescribeGlobalResult`

We added the `mrEnabled` field, which indicates whether Most Recently Used (MRU) list functionality is enabled for the object (`true`) or not (`false`).

`describeFlexiPages()` and `DescribeFlexiPageResult`

The `SubjectType` field is no longer reserved for future use. To support the general availability of creating and editing record pages in Lightning Experience, this field represents the object a FlexiPage is associated with.

The `type` field now supports the following values:

- `HomePage`—Represents a Lightning Page that is used to override the Home page in Lightning Experience.
- `RecordPage`—Represents a Lightning Page used to override an object record page in Lightning Experience.

search () and SearchResult

We added the `searchResultsMetadata` property. The property includes metadata, such as object name and field labels, for the records returned. Metadata is returned only if specified in the request using `WITH METADATA` and the value `LABELS` in the SOSL search string. For example:

```
FIND {Acme} RETURNING Account WITH METADATA='LABELS'
```

Changed Headers**DebuggingHeader**

We've standardized `DebuggingHeader` across the APIs. You can now provide a `categories` parameter in the SOAP, Metadata, and Tooling APIs. The `categories` parameter is of type `LogInfo`. `LogInfo` is a mapping of `category` to `level`. Previously, both `categories` and the `debugLevel` enumeration were available in the Tooling and Metadata APIs, but only `debugLevel` was available in the SOAP API.

If you'd prefer not to switch, you can continue to use the `debugLevel` enum. But we recommend taking advantage of the increased granularity offered by `categories`.

In case you decide to continue using `debugLevel`, we've added the `Profiling`, `Callout`, and `Detail` logging levels to this enum. Previously, these values were available in the Tooling and Metadata APIs but not in the SOAP API.

We've also updated all our `DebuggingHeader` documentation. Between you and me: The docs didn't reflect the old structure or the new structure of this header. (Cue sad trombone sound.)

OwnerChangeOptions

The `EnforceNewOwnerHasReadAccess` type has been added to the `ChangeOwnerOption` field. If true, this type requires the new record owner to have at least read access to the record.

Chatter REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. In this release, you can include code blocks in your feed posts, get article recommendations, clean your records, and more.

 **Note:** To create custom Chatter and Communities experiences in Salesforce, use [ConnectApi \(Chatter in Apex\)](#).

IN THIS SECTION:

[New and Changed Chatter REST API Resources](#)

[New and Changed Chatter REST API Request Bodies](#)

[New and Changed Chatter REST API Response Bodies](#)

New and Changed Chatter REST API Resources**Chatter****Control when Chatter email digests are sent**

To control when Chatter email digests are sent, make a POST request to the new `/chatter/digests` resource with the new `Digest Job Input` or the `period` parameter.

To use this resource, contact Salesforce to enable API-only Chatter digests.



Warning: Enabling API-only Chatter digests disables the scheduled digests for your org. You must call the API for your users to receive their digests.

Clean

Clean records with a clean rule

To clean records with a clean rule, make a POST request to `/clean` with the ID of the clean rule and the IDs of the records to clean.

Get the data services associated with an org's active clean rules

To get the data services associated with active clean rules for an org, make a GET request to the new `/clean/data-services` resource.

Get metrics for the data services associated with an org's active clean rules

To get metrics for the data services associated with active clean rules for an org, make a GET request to the new `/clean/data-services/dataServiceId/metrics` resource.

Get the statuses of active clean rules for a record

To get the status of active clean rules for a record, make a GET request to the new `/clean/recordId/rules/statuses` resource.

External Email Services

External Email Services Resource

To get the landing page that the user starts on when sending email through an external account, make a GET request to `/authenticated-email-service` when finished with the OAuth authorization process.

Feeds

Include a code block in a feed post

To include a code block in a feed post, make a POST request to the existing `/chatter/feed-elements` resource with the updated Message Segment Input: Markup Begin and Message Segment Input: Markup End request bodies.

Access the interactions capability of a feed element

To access the interactions capability of a feed element, make a GET request to the new `/chatter/feed-elements/feedElementId/capabilities/interactions` resource.

Access the status capability of a feed element (Beta)



Note: This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

To access the status capability of a feed element, make a GET request to the new `/chatter/feed-elements/feedElementId/capabilities/status` resource.

Approve a feed post (Beta)



Note: This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

To approve a feed post, make a PATCH request to the new `/chatter/feed-elements/feedElementId/capabilities/status` resource with the new Status Capability Input or the `feedEntityStatus` parameter set to `Published`.

Only users with the “Can Approve Feed Post” permission can set the status of a feed element.

Get related questions (Beta)



Note: This release contains a beta version of related questions, which means it's a high-quality feature with known limitations. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for related questions in the [Community Implementation](#) group in the Success Community.

To get questions related to a context question, make a GET request to the new `/chatter/feed-elements/feedElementId/related-posts` resource, where `feedElementId` is a question ID.

Files

Get topics assigned to a file

To get topics assigned to a file, make a GET request to the existing `/connect/records/recordId/topics` resource, where `recordId` is a file ID.

Assign topics to a file

To assign topics to a file, make a POST request to the existing `/connect/records/recordId/topics` resource with the Topic Assignment Input.

Replace topics assigned to a file

To replace all assigned topics on a file with different topics, make a PUT request to the existing `/connect/records/recordId/topics` resource with the Topic Names Input.

Remove topics from a file

To remove a topic from a file, make a DELETE request to the existing `/connect/records/recordId/topics` resource with the `topicId` parameter.

Recommendations

Get article recommendations

To get article recommendations, make a GET request to these existing resources.

- `/chatter/users/userId/recommendations`
- `/chatter/users/userId/recommendations/view`
- `/chatter/users/userId/recommendations/view/articles`
- `/chatter/users/userId/recommendations/view/kA0`
- `/chatter/users/userId/recommendations/view/recommendedArticleId`

Delete an article recommendation

To delete an article recommendation, make a DELETE request to the existing `/chatter/users/userId/recommendations/action/objectId` resource, where `action` is `view` and `objectId` is `recommendedArticleId`.

Topics

Provide a list of topic suggestions to assign to a feed item or record to improve future topic suggestions

To provide a list of suggested topics to assign to a feed item or record, make a PUT request to the existing `/connect/records/recordId/topics` resource with the updated Topic Names Input.

New and Changed Chatter REST API Request Bodies

Async Queries (Pilot)

Async Query Input

The new `targetValueMap` property is a mapping of literal values to target object fields.

Chatter

Digest Job Input

This new request body has one property, `period`, which specifies the period of time included in a Chatter email digest.

Clean

Clean Input

This new request body has these properties.

- `cleanRuleId`—The 18-character ID of the clean rule used to clean records. Get the IDs for active clean rules from the Clean Rule Statuses resource.
- `cleanType`—The system-generated type of clean operation used by the clean rule. One of these values:
 - `BulkClean`—Cleans all existing records applicable to the specified clean rule.
 - `Incremental`—Cleans only records that do not have a status of `In Sync` or `Reviewed`.
 - `Manual`—Manually cleans records with the specified clean rule.
 - `Perpetual`—Automatically cleans saved records with the specified clean rule.
- `entityIds`—The 18-character IDs of the records to clean using the clean rule.
- `requestId`—The system-generated ID of the clean request.

Feeds

Message Segment Input: Markup Begin

The `markupType` property of this request body supports a new `Code` value. Markup segments with a `markupType` of `Code` can include only text segments.

Message Segment Input: Markup End

The `markupType` property of this request body supports a new `Code` value.

Status Capability Input (Beta)

This new request body has one property, `feedEntityStatus`, which specifies the status of the feed item. Values are:

- `PendingReview`—The feed item isn't approved yet and therefore isn't published or visible.
- `Published`—The feed item is approved and visible.

Topics

Topic Names Input

The new `topicSuggestions` property lists suggested topics to assign to a feed item or record to improve future topic suggestions.

New and Changed Chatter REST API Response Bodies

Async Queries (Pilot)

Async Queries

This response body has these new properties.

- `message`—A message to the user.
- `targetValueMap`—A mapping of literal values to target object fields.

Chatter

Digest Job

This new response body has one property, `period`, which specifies the period of time included in a Chatter email digest.

Clean

Clean Rule Data Service

This new response body has these properties.

- `cleanDataServiceId`—ID of the data service associated with a clean rule for a record.
- `dataServiceMasterLabel`—Name of the data service associated with a clean rule for a record.

Clean Rule Data Service Collection

This new response body has one property, `dataServiceRecords`, which is a collection of data services associated with all active clean rules in an org.

Clean Rule Data Service Metrics

This new response body has these properties.

- `cleanRuleErrorsUrl`—URL where cleaning errors for the data service can be downloaded.
- `cleanRuleId`—ID of the clean rule that uses the data service.
- `cleanRuleName`—Name of the clean rule that uses the data service.
- `entityName`—Name of the record type associated with the data service.
- `errorCount`—Number of records with cleaning errors for the clean rule.
- `matchedRecords`—Number of records with a clean rule status of `In Sync`, `Different`, or `Skipped`.
- `processedRecords`—Number of records processed by the clean rule.
- `totalRecords`—Number of total records that are available for processing by the clean rule.

Clean Rule Data Service Metrics Collection

This new response body has these properties.

- `cleanMetricRecords`—List of metrics for data services associated with all active clean rules in an organization.
- `metricDate`—Date when metrics were generated.
- `metricUri`—URL for the Clean Metric API.

Clean Record Result

This new response body has these properties.

- `cleanStatus`—Status of the clean rule used to clean the record.
- `dataSourceKey`—Key for the external data source used to clean the record.

Clean Record Result Collection

This new response body has one property, `cleanRecord`, which is a collection of results from cleaning records with clean rules.

Clean Rule Status

This new response body has these properties.

- `dataServiceName`—Data service associated with the clean rule.
- `lastCleanDate`—Date when the record was last cleaned with the clean rule.
- `needCompare`—Indicates whether there are field value differences between the Salesforce record and the matching record in the data service.
- `ruleId`—ID of the clean rule.
- `ruleName`—Name of the clean rule.
- `status`—Status of the clean rule. For more information and available values, see “Statuses for Data.com Clean Rules” in Salesforce Help.
- `statusId`—ID of the status for the clean rule.

Clean Rule Status Collection

This new response body has these properties.

- `cleanStatusRecords`—Collection of clean statuses for a record’s clean rules.
- `entityId`—ID of the record.
- `statusUri`—URI for the clean status.

External Email Services**OAuth User**

This new response body has these properties:

- `availableExternalEmailService`—The available OAuth service provider.
- `isAuthenticated`—Specifies whether the user is authenticated (`true`) or not (`false`).

OAuth Provider

This new response body has these properties:

- `authorizationUrl`—The URL used for authorization.
- `name`—The name of the OAuth service provider.

Feeds**Comment Page**

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.

Feed Element Capabilities

This response body has these new properties.

- `interactions`—If a feed element has this capability, it has information about user interactions.
- `status` (Beta)—If a feed element has this capability, it has a status that determines its visibility.

Feed Element Page

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.

Interactions Capability

This new response body has one property, `count`, which is the number of individual views, likes, and comments on a feed post.

Like Page

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.
- `previousPageToken`—Token identifying the previous page or `null` if there is no previous page.

Message Segment: Inline Image

The new `fileExtension` property is the extension of the inline image, such as gif.

Message Segment: Markup Begin

The `markupType` property of this response body supports a new `Code` value.

Message Segment: Markup End

The `markupType` property of this response body supports a new `Code` value.

Related Feed Post (Beta)

This new response body has these properties.

- `id`—18-character ID of the related feed post.
- `motif`—Icon that identifies the related feed post. The motif can also contain the object's base color.
- `mySubscriptions`—If the context user is following the item, it contains information about the subscription. Otherwise, it returns `null`.
- `name`—Name of the related feed post.
- `score`—Score of the related feed post that indicates how closely related it is to the context feed post.
- `title`—Title of the related feed post.
- `type`—Value is `RelatedQuestion`.
- `url`—URL to the related feed post.

Related Feed Post Collection (Beta)

This new response body has one property, `relatedFeedPosts`, which is a collection of related feed posts.

Related Question (Beta)

This new response body has these properties.

- `hasBestAnswer`—Indicates whether the question has a best answer.
- `id`—18-character ID of the related question.
- `motif`—Icon that identifies the related question. The motif can also contain the object's base color.
- `mySubscriptions`—If the context user is following the item, it contains information about the subscription. Otherwise, it returns `null`.
- `name`—Name of the related question.
- `score`—Score of the related feed post that indicates how closely related it is to the context feed post.

- `title`—Title of the related feed post.
- `type`—Value is `RelatedQuestion`.
- `url`—URL to the related question.

Status Capability (Beta)

This new response body has these properties.

- `feedEntityStatus`—Specifies the status of the feed item. Values are:
 - `PendingReview`—The feed item isn't approved yet and therefore isn't published or visible.
 - `Published`—The feed item is approved and visible.
- `isApprovableByMe`—Specifies whether the current user can change the status of the feed item from `PendingReview` to `Published`.

Files

File Detail

The new `topics` property is a collection of topics assigned to the file.

Groups

Photo

The new `mediumPhotoUrl` property is the URL to the medium size (default width is 160 pixels) group photo.

Messages

Conversation Summary Collection

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.

Message Collection

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.

Mobile

Features

This response body has these new properties.

- `offlineEditEnabled`—Specifies whether the offline object permissions are enabled for Salesforce1 downloadable app mobile clients.

Recommendations

Article Summary

This new response body has these properties.

- `articleType`—Type of the knowledge article.
- `id`—18-character ID of the knowledge article.

- `lastPublishedDate`—Last published date of the knowledge article.
- `motif`—Small, medium, and large icons indicating that the object is a knowledge article. The motif can also contain the object's base color.
- `mySubscription`—If the context user is following this article, it contains information about the subscription. Otherwise, it returns `null`.
- `name`—Name of the article.
- `rating`—The rating of the article.
- `summary`—Summary of the knowledge article contents.
- `title`—Title of the knowledge article.
- `type`—Value is `KnowledgeArticle`.
- `url`—URL for the knowledge article.
- `urlName`—URL name of the knowledge article.

Recommendation

This response body's `entity` property now supports Article Summary response bodies.

Users

Photo

The new `mediumPhotoUrl` property is the URL to the medium size (default width is 160 pixels) profile photo.

User Page

This response body has these new properties.

- `currentPageToken`—Token identifying the current page.
- `nextPageToken`—Token identifying the next page or `null` if there is no next page.
- `previousPageToken`—Token identifying the previous page or `null` if there is no previous page.

Reports and Dashboards REST API

Reports and Dashboards REST API enhancements let you get report data and give you access to dashboard metadata and dashboard components.

New Resources: Dashboard Describe and Report Query

The Reports and Dashboards REST API includes a new resource that returns dashboard metadata.

Resource URI	Supported HTTP Method	Description
Dashboard Describe <code>/services/data/v37.0/analytics/dashboards/describe</code>	GET	Returns metadata for the specified dashboard, including dashboard components, filters, layout, and the running user.
Report Query <code>/services/data/v37.0/analytics/reports/query</code>	POST	Returns report data without saving changes to an existing report or creating a new one.

For more information about these properties, see the [Reports and Dashboards REST API Developer's Guide](#).

Changed Resource: Dashboard Results

Get details about specified dashboard components using a POST request to the Dashboard Results resource in the Reports and Dashboards REST API.

The Reporting REST API has the following new methods.

Resource URI	New HTTP Method	Request Body	Description
Dashboard Results <code>services/Analytics/Reports/dashboards/</code>	POST	<pre>{ "componentIds": ["01aR00000005aT4IAI", "01aR00000005aT5IAI"] }</pre>	Returns details about dashboard components specified in the request body.

For more information about these methods, see the [Reports and Dashboards REST API Developer's Guide](#).

Bulk API

Bulk API includes support for cross-origin resource sharing (CORS) and enhancements for BigObjects.

IN THIS SECTION:

[Use CORS to Access Bulk API](#)

CORS (cross-origin resource sharing) is a W3C recommendation that enables web browsers to request resources from origins other than their own (cross-origin requests). For example, using CORS, a JavaScript script at `https://www.example.com` can request a resource from `https://www.salesforce.com`. Bulk API now supports CORS.

[Bulk API for BigObjects Validates Data at Import](#)

The Bulk API for BigObjects has been enhanced to perform data validation and provide meaningful error messages.

Use CORS to Access Bulk API

CORS (cross-origin resource sharing) is a W3C recommendation that enables web browsers to request resources from origins other than their own (cross-origin requests). For example, using CORS, a JavaScript script at `https://www.example.com` can request a resource from `https://www.salesforce.com`. Bulk API now supports CORS.

To access this API from JavaScript in a web browser, add the origin that's serving the script to the CORS whitelist. To add an origin to the CORS whitelist, from Setup, enter `CORS` in the **Quick Find** box, then select **CORS**. Click **New**, and then enter an origin URL pattern.

The origin URL pattern must include HTTPS (unless you're using your localhost) and a domain name and can optionally include a port. The wildcard character (*) is supported and must precede a second-level domain name. For example, `https://*.example.com` adds all subdomains of `example.com` to the whitelist.

If a browser that supports CORS makes a request from an origin in the Salesforce CORS whitelist, Salesforce returns the origin in the `Access-Control-Allow-Origin` HTTP header. Salesforce also returns any additional CORS HTTP headers. If the origin isn't in the whitelist, Salesforce returns HTTP status code 403.

You must still pass an OAuth token with requests that require it.

SEE ALSO:

[IdeaExchange: Support of CORS \(Cross-Origin Resource Sharing\) in Salesforce REST](#)

Bulk API for BigObjects Validates Data at Import

The Bulk API for BigObjects has been enhanced to perform data validation and provide meaningful error messages.

 **Note:** This feature is available to select customers through a pilot program. To be nominated to join this pilot program, contact salesforce.com. Additional terms and conditions may apply to participate in the pilot program.

Bulk API now validates data at the time of import, and generates an error message for the first occurrence of invalid data in any row of the data file. This makes it easy to identify any data that was not imported, and the specific reason why the import failed.

The error messages are written to a new BigObject called `BackgroundOperationResult`. The `Message` field stores the text of the error message. The `ParentID` field stores the ID of the batch used for importing the data.

The validation performed depends on the type of data being imported.

- **Text**—The length of the input string must be less than or equal to the length of the corresponding text field in the target object.
- **Number**—The input data must be a number, whose scale and precision are compatible with the corresponding number field in the target object.
- **ID**—The input data must be a valid 15- or 18-character ID.
- **DateTime**—The input data must be a valid `dateTime` value, in the approved format.
- **Lookup**—The lookup value must be a valid 15- or 18-character ID.

After importing any data, you can check for errors by querying the `BackgroundOperationResult` object. For example, this query returns details of all errors from the data whose batch ID is `751xx0000000060AAQ`.

```
SELECT CreatedById, CreatedDate, Id, Message, MessageType, ParentId FROM
BackgroundOperationResult WHERE ParentId = "751xx0000000060AAQ"
```

Streaming API

Streaming API includes Durable PushTopic Streaming and filters for PushTopic subscriptions.

IN THIS SECTION:

[Replay Events with Durable PushTopic Streaming \(Generally Available\)](#)

You can now replay PushTopic-based streaming events! Salesforce stores events for 24 hours, so you can retrieve stored events during that window. This release, we expanded support of durable streaming to include PushTopic events, in addition to generic events.

[Apply Filters to Your PushTopic Subscriptions](#)

Narrow down your PushTopic event notifications to a meaningful set by adding filter criteria to your subscription URI.

Replay Events with Durable PushTopic Streaming (Generally Available)

You can now replay PushTopic-based streaming events! Salesforce stores events for 24 hours, so you can retrieve stored events during that window. This release, we expanded support of durable streaming to include PushTopic events, in addition to generic events.

The Streaming API event framework decouples event producers from event consumers. As a result, a subscriber can retrieve events at any time and isn't restricted to listening to events at the time they're sent.

Single Endpoint

Use the Streaming API endpoint to replay event notifications for durable PushTopic events. This endpoint also applies to durable generic events.

```
https://Salesforce_Instance/cometd/37.0/
```

-  **Note:** Durable streaming is supported at this endpoint starting with API version 37.0. If you're using Durable Generic Streaming in version 36.0, we recommend that you upgrade to version 37.0 and use this endpoint instead of `https://Salesforce_Instance/cometd/replay/36.0/`.

Event Numbering

Each broadcasted event is assigned a numeric ID. IDs are incremented and not guaranteed to be contiguous for consecutive events. Each ID is guaranteed to be higher than the ID of the previous event. For example, the event following the event with ID 999 can have an ID of 1,025. The ID is unique for the org and the channel. The IDs of deleted events aren't reused.

The ID is added in the `replayId` field of the notification message. For example, this JSON message shows the `replayId` field in the event object for a PushTopic event.

```
{
  "clientId": "2t80j2hcog29sdh9ihjd9643a",
  "data": {
    "event": {
      "createdDate": "2016-03-29T16:40:08.208Z",
      "replayId": 13,
      "type": "created"
    },
    "subject": {
      "Website": null,
      "Id": "001D000000KnaXjIAJ",
      "Name": "TicTacToe"
    }
  },
  "channel": "/topic/TestAccountStreaming"
}
```

-  **Note:** The time format of the `createdDate` field value has changed to make it consistent with the time format used in the Salesforce app. The time portion now ends with a `Z` suffix instead of `+0000`. Both suffixes denote a UTC time zone.

Replaying Events

A subscriber can choose which events to receive, such as all events within the retention window or starting after a particular event. The default is to receive only the new events sent after subscribing. Events outside the 24-hour retention period are discarded.

This high-level diagram shows how event consumers can read a stream of events by using various replay options.

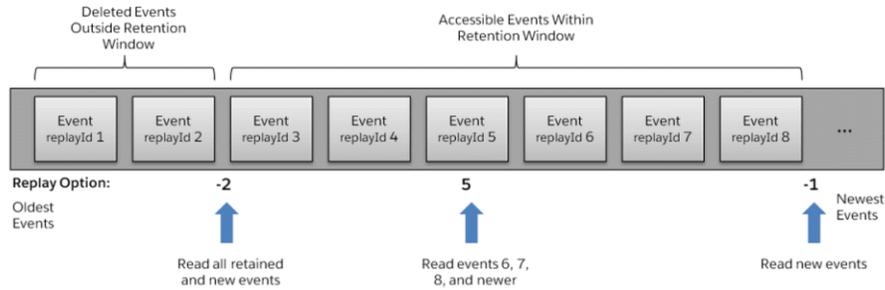


Table 3: Replay Options

Replay Option	Description
Replay ID	Subscriber receives all events after the event specified by its <code>replayId</code> value.
-1	Subscriber receives new events that are broadcast after the client subscribes.
-2	Subscriber receives all events, including past events that are within the 24-hour retention window and new events sent after subscription.

CometD Extension

The replay mechanism is implemented in a Salesforce-provided CometD extension. A sample extension is provided in JavaScript and another in Java. For example, you can register the extension as follows in JavaScript.

```
// Register streaming extension
var replayExtension = new cometdReplayExtension();
replayExtension.setChannel(<Streaming Channel to Subscribe to>);
replayExtension.setReplay(<Event Replay Option>);
cometd.registerExtension('myReplayExtensionName', replayExtension);
```

For a Visualforce sample that uses the CometD extension in JavaScript, see the [Salesforce Durable Streaming Demo](#) on GitHub. A [walkthrough of this sample](#) is provided in the Summer '16 version of the [Streaming API Developer Guide](#).

For CometD client extensions to replay events in Java and JavaScript, see <https://github.com/developerforce/StreamingReplayClientExtensions>.

Apply Filters to Your PushTopic Subscriptions

Narrow down your PushTopic event notifications to a meaningful set by adding filter criteria to your subscription URI.

Specify the filter criteria in an expression you append to the subscription URI, as follows.

```
/topic/ChannelName?<expression>
```

`ChannelName` is the channel, and `<expression>` is the expression containing one or more conditions. Join conditions with the `&` operator. Only the `&` operator is supported. Use this syntax for the `<expression>`.

```
?fieldA=valueA&fieldB=valueB&...
```

Include each field used in a filter condition in the PushTopic query. The `&` operator acts like the logical OR operator, so record events are matched if any condition is true.

 **Note:** If you use an ID in filter criteria, use the 18-character ID format; 15-character IDs aren't supported.

 **Example:** This subscription returns event notifications for records whose industry is Energy *or* shipping city is San Francisco.

```
/topic/myChannel?Industry='Energy'&ShippingCity='San Francisco'
```

The PushTopic query for this subscription includes the `Industry` and `ShippingCity` fields.

Tooling API

Tooling API includes new namespaces, new and changed objects, and changed behavior.

The [Force.com Tooling API Developer's Guide](#) contains all Tooling API information.

IN THIS SECTION:

[New Tooling API Namespaces](#)

Tooling API includes two new namespaces, resulting in a total of four namespaces. After you regenerate the Tooling API WSDL and use it in your development platform, you can use all four namespaces and the new sObjects and fields in API version 37.0.

[Tooling API New and Changed Objects](#)

Tooling API includes new and changed objects.

[Tooling API Calls and Methods](#)

Tooling API added a field to the responses of all describe calls and resources.

New Tooling API Namespaces

Tooling API includes two new namespaces, resulting in a total of four namespaces. After you regenerate the Tooling API WSDL and use it in your development platform, you can use all four namespaces and the new sObjects and fields in API version 37.0.

The new `subject.tooling.soap.sforce.com` namespace contains the Tooling API sObjects and uses the `ens` prefix. The new `fault.tooling.soap.sforce.com` namespace contains the Tooling API error-handling objects and uses the `fns` prefix. Both namespaces contain objects that were defined in the `tns` (`urn:tooling.soap.sforce.com`) namespace in API version 36.0 and earlier.

Clients written against API version 36.0 and earlier can still use the `tns` and `mns` namespaces to access sObjects and error-handling objects.

SEE ALSO:

[Force.com Tooling API: Tooling API Objects and Namespaces](#)

Tooling API New and Changed Objects

Tooling API includes new and changed objects.

New Objects

ApexTestResultLimits

Captures the Apex test limits used for a particular test method execution. An instance of this object is associated with each ApexTestResult object.

ApexTestRunResult

Contains summary information about all the test methods that were run in a particular Apex job.

Certificate

Represents a certificate used for digital signatures that verify requests are coming from your org. Certificates are used for either authenticated single sign-on with an external website or when using your org as an identity provider.

OperationLog

Represents long-running or asynchronous operations triggered and tracked through Tooling API.

OpportunitySplitType

Represents labels and behavior for each split type. This object is read-only in the Tooling API, and is only available when Teamselling and Opportunity Splits are enabled.

PermissionSetTabSetting

Represents a tab's settings for a profile or permission set. Use PermissionSetTabSetting for manipulating tab visibility on profiles and permission sets.

RemoteProxy

Represents a set of remote site settings that allows you to access an external site from Salesforce. Use RemoteProxy when accessing external sites called by Visualforce pages, Apex callouts, or JavaScript codes using XMLHttpRequest in an s-control or custom button. To be accessible, an external site must have its settings defined with RemoteProxy or registered in the Remote Site Settings page.

SecurityHealthCheck

Represents your org's Health Check score. The score indicates how well your org's security settings comply with Salesforce-recommended values in the baseline standard. Only users with the "Modify All Data" user permission can retrieve data from this object.

SecurityHealthCheckRisks

Represents your org's security setting values, risks, and Salesforce-recommended setting values. Only users with the "Modify All Data" user permission can retrieve data from this object.

Changed Objects

ApexTestQueueItem

The following field has been added.

TestRunResultId

The ID of the associated ApexTestRunResult object.

ApexTestResult

The following fields have been added.

ApexTestRunResultId

The ID of the ApexTestRunResult object that represents the entire test run.

RunTime

The time it took the test method to run, in seconds.

In addition, you can now create, delete, and update ApexTestResult objects, and all fields on the ApexTestResult object are now creatable and updateable.

EntityDefinition

The following fields have been added.

DeploymentStatus

Specifies the deployment status of the entity. Controls whether a custom object and its associated custom tab, related lists, and reports are visible to non-admin users.

Description

The description of the entity. A meaningful description makes it easier to distinguish between custom objects when they are viewed in a list.

IsActivityTrackable

If `true`, activities, such as tasks and scheduled calendar events associated with the custom object, can be tracked. Can be enabled only for custom objects.

IsFieldHistoryTracked

If `true`, your org can track changes to fields on the custom object records. History data is available for reporting, so users can easily create audit trail reports. Can be enabled only for custom objects.

IsMruEnabled

Indicates whether Most Recently Used (MRU) list functionality is enabled for the specified object.

IsReportingEnabled

If `true`, the data in the custom object's records is available for reporting. Can be enabled only on custom objects.

FlexiPage

The following system fields are now available: `SystemModstamp` and `CreatedDate`.

The following fields have been updated.

parentFlexiPage

This field is no longer reserved for future use. It represents the name of the FlexiPage from which the current page inherits behavior.

SubjectType

This field is no longer reserved for future use. To support the general availability of creating and editing record pages in Lightning Experience, this field represents the object a FlexiPage is associated with.

Type

The `Type` field now supports the following values.

- `HomePage`—Represents a Lightning Page used to override the Home page in Lightning Experience.
- `RecordPage`—Represents a Lightning Page used to override an object record page in Lightning Experience.

ModerationRule

The `Action` field now supports the value `Review`. You can use this value to set up community pre-moderation rules to review member-generated content.

 **Note:** This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

RelationshipDomain and RelationshipInfo

The `JunctionIdListName` field is now a complexvalue field named `JunctionIdListNames` to reflect the use of multiple lists. This field is now nillable. This field no longer has a default value when it is created and can no longer be filtered, grouped, or sorted.

SandboxProcess

The following fields have been added.

SandboxOrganization

The ID of the org created by the copy process.

SourceId

The ID of the SandboxInfo that this sandbox is a clone of. Allows you to clone or refresh a sandbox from another sandbox.

SEE ALSO:

[Easily Retrieve Security and Risk Data with the Health Check API](#)

Tooling API Calls and Methods

Tooling API added a field to the responses of all describe calls and resources.

General Updates**mrUEnabled Field on Describe Results**

We added the `mrUEnabled` field to the responses of all describe calls and resources. This field indicates whether Most Recently Used (MRU) list functionality is enabled for the object (`true`) or not (`false`).

SOAP Calls**runTestsAsynchronous ()**

In API version 37.0 and later, the `runTestsAsynchronous ()` call takes a required `testLevel` parameter. This parameter's value can be `null`. Permissible `TestLevel` enum values include:

RunSpecifiedTests

Only the tests that you specify are run.

RunLocalTests

All tests in your org are run, except the ones that originate from installed managed packages.

Omit identifiers for specific tests when you use this value.

RunAllTestsInOrg

All tests are run. The tests include all tests in your org, including tests of managed packages.

Omit identifiers for specific tests when you use this value.

To use `TestLevel.RunLocalTests` or `TestLevel.RunAllTestsInOrg`, specify both `classids` and `suiteids` as null.

This example shows the structure of a call to a class that calls the `runTestsAsynchronous` endpoint.

```
conn.runTestsAsynchronous(classids, suiteids, maxFailedTests, testLevel.value)
```

REST Resources**/runTestsAsynchronous/ and /runTestsSynchronous/**

In API version 37.0 and later, the `GET` verb is no longer available for `/runTestsAsynchronous/` or `/runTestsSynchronous/`. `GET` is still available in API version 36.0 and earlier. In API version 37.0 and later, use only `POST`.

In API version 37.0 and later, `/runTestsAsynchronous/` takes an optional `testLevel` parameter. If you don't provide a `testLevel` value, we use `RunSpecifiedTests`. Permissible `TestLevel` enum values include:

RunSpecifiedTests

Only the tests that you specify are run.

RunLocalTests

All tests in your org are run, except the ones that originate from installed managed packages.

Omit identifiers for specific tests when you use this value.

RunAllTestsInOrg

All tests are run. The tests include all tests in your org, including tests of managed packages.

Omit identifiers for specific tests when you use this value.

Metadata API: New and Changed Types

Metadata API includes new and changed types and fields.

New Metadata Types

GlobalPicklist

Represents the metadata for a global picklist, or the set of shared picklist values that custom picklist fields can use. (In contrast, the custom picklist fields that are based on a global picklist are of type `Picklist`.) This type extends the `Metadata` metadata type and inherits its `fullName` field.

GlobalPicklistValue

Represents the definition of a value used in a global picklist. Custom picklist fields can inherit the picklist value set from a global picklist. This type extends the `Metadata` metadata type and inherits its `fullName` field.

OrgPreferenceSettings

Represents the unique org preference settings in a Salesforce org.

SearchSettings

Represents an org's search settings.

WaveApplication

Represents the Wave Analytics application.

WaveDashboard

Represents the `WaveDashboard` object in the Wave Analytics application.

WaveDataflow

Represents the `WaveDataflow` object in the Wave Analytics application.

WaveDataset

Represents the `WaveDataset` object in the Wave Analytics application.

WaveLens

Represents the `WaveLens` object in the Wave Analytics application.

New Metadata Field Types

FieldType

A `MetadataRelationship` value was added to `FieldType` in support of custom metadata relationships.

Updated Metadata Types and Fields

These metadata types have changed or have fields that have been added or changed.

Certificate

The following field has been added.

expirationDate

The date that this certificate expires and is no longer usable. For self-signed certificates, if `keySize` is 2048 bits, the expiration date is 1 year after you create the certificate. If `keySize` is 4096 bits, the expiration date is 2 years after you create the certificate. For CA-signed certificates, `expirationDate` is updated to the signed certificate's expiration date when a signed certificate chain is uploaded. The date format is YYYY-MM-DD.

Community (Zone)

The following field has been added.

chatterAnswersFacebookSsoUrl

Read only. The Facebook sign-on URL, which is based on the Facebook authentication provider selected in your Chatter Answers settings. This field is available only if Chatter Answers and Facebook Single Sign-On for Chatter Answers are enabled.

CustomField

The following field has been added.

globalPicklist

If this custom field is a picklist that's based on a global picklist, `globalPicklist` is the name of the global picklist whose value set this picklist inherits. A custom picklist that's based on a global picklist is restricted. You can only add or remove values by editing the global picklist.

CustomObject

The `enableSearch` field now supports external objects.

CustomTab

The following field has been added.

actionOverrides

A list of the action overrides that are assigned to the tab.

EntitlementProcess

The following field has been added.

SObjectType

Indicates the type of record that the entitlement process can run on. In Summer '16, entitlement processes have two possible types: Case and Work Order.

FlexiPage

The `parentFlexiPage` field is no longer reserved for future use. It represents the name of the FlexiPage that the current page inherits behavior from.

The `subjectType` field is no longer reserved for future use. To support the general availability of creating and editing record pages in Lightning Experience, this field represents the object a FlexiPage is associated with.

The `type` field now supports the following values.

- `CommAppPage`—A Lightning Page that represents a custom page in a community, as created in the Community Builder.
- `HomePage`—Represents a Lightning Page that is used to override the Home page in Lightning Experience.
- `RecordPage`—Represents a Lightning Page that is used to override an object record page in Lightning Experience.

ForecastingSettings

The following fields have been added.

isAmount

This read-only field indicates whether the forecast type is based on revenue amounts. The value of `isAmount` is always the opposite of the value of `isQuantity`.

isAvailable

This read-only field indicates whether the forecast type can currently be used in the organization. For example, the revenue splits forecast type can't be used in an organization that doesn't have Opportunity Splits enabled.

isQuantity

This read-only field indicates whether the forecast type is based on product quantities. The value of `isQuantity` is always the opposite of the value of `isAmount`.

masterLabel

This read-only field indicates the UI label for the forecast type.

OpportunityListFieldsLabelMappings

A read-only list of the API names and UI labels for all fields on the Opportunity object.

OpportunityListFieldsUnselectedSettings

The fields *not* selected to appear in the opportunity pane of the forecast page for the forecast type.

KnowledgeSettings

The following field has been added.

suggestedArticles

Represents the metadata to manage settings for case fields to suggest articles for cases.

Layout

The following field has been added to the `AnalyticsCloudComponentLayoutItem` subtype.

showSharing

If set to `true`, and the dashboard is shareable, then the dashboard shows the Share icon. Users can click the icon to open the Share dialog and post or download from the dashboard. If set to `false`, the dashboard doesn't show the Share icon.

ModerationRule

The `action` field now supports the value `Review`. You can use this value to set up community pre-moderation rules to review member-generated content.



Note: This release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

Network

The following field has been added.

navigationLinkSet

Represents the navigation menu in a community. A navigation menu consists of items that users can click to go to other parts of the community.

PermissionSet

The following field has been added.

hasActivationRequired

Indicates whether the permission set requires an associated active session (`true`) or not (`false`).

The following field has been updated.

label

This is now a required field.

Picklist

The following field has been added.

restrictedPicklist

Indicates whether the picklist's value list is restricted. With a restricted picklist, only an admin can add or change values; users can't load or remove values through the API. By default this value is `false`.

PicklistValue

PicklistValue now extends GlobalPicklistValue instead of Metadata. Also, the following fields were removed from PicklistValue and have been moved to GlobalPicklistValue.

color

The color assigned to the picklist value when it's used in charts on reports and dashboards. The color is in hexadecimal format; for example, `#FF6600`. If a color is not specified, it's assigned dynamically upon chart generation.

default

Required. Indicates whether this value is the default selection for the global picklist and the custom picklists that share its picklist value set. This field is set to `true` by default.

description

The global picklist value's description. It's useful to include a description for a global picklist value so the reason for creating it can be tracked. Limit: 255 characters.

Profile

The following field has been added.

profileActionOverrides

A list of the Lightning Experience Home page action overrides that are assigned to this profile. When a user logs in with a profile, a matching ProfileActionOverride assignment takes precedence over existing overrides for the Home tab specified in ActionOverride.

ProfileTabVisibility

The following field has been changed.

visibility

In version 36.0 and earlier, `Hidden` is returned only if `visibility` was set using the API. If it was set to `Hidden` from the profile in Salesforce, the API doesn't return a visibility value. For version 37.0 and later, when tab visibility is set to hidden, the API returns `Hidden`, regardless of how the value was set.

Translations

The following field has been added.

globalPicklists

A list of global picklist translations. A global picklist's value set is inherited by all the custom picklist fields that are based on it.

Salesforce Console API (Integration Toolkit)

The toolkit includes new and updated methods that let you customize a console programmatically. This feature is available in Salesforce Classic only.

For more information (English only) about the toolkit, see the [Salesforce Console Integration Toolkit Developer's Guide](#).

The following methods are new or have changed in API version 37.0.

declineAgentWork

The `declineAgentWork` method has a new argument.

- `declineReason`—The provided reason for why the agent declined the work request.

EDITIONS

Salesforce console available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

getServicePresenceStatusId

The `getServicePresenceStatusId` method has two new properties in the response.

- `statusName`—The name of the presence status.
- `statusAptName`—The API name of the presence status.

setServicePresenceStatus

The `setServicePresenceStatus` method has two new properties in the response.

- `statusName`—The name of the presence status.
- `statusAptName`—The API name of the presence status.

sforce.console.ConsoleEvent.PRESENCE.STATUS_CHANGED

The `STATUS_CHANGED` console event has two additions to the payload. These additions appear in new and existing versions of the event.

- `statusName`—The name of the presence status.
- `statusAptName`—The API name of the presence status.

sforce.console.ConsoleEvent.PRESENCE.WORKLOAD_CHANGED

New Omni-Channel console event. Fired when an agent's workload changes. This includes receiving new work items, declining work items, and closing items in the console. It's also fired when there's a change to an agent's capacity or Presence Configuration or when the agent goes offline in the Omni-Channel widget. The payload includes the following properties.

- `ConfiguredCapacity`—The configured capacity for the agent.
- `PreviousWorkload`—The agent's workload before the change.
- `NewWorkload`—The agent's new workload after the change.

ISVforce

ISVforce tools make it easy to build, package, and distribute apps and Lightning components. Now you can visualize AppExchange Checkout data and communicate effortlessly with customers and team members. We also updated branded login pages in Trialforce to give your customers a clean, modern login experience.

EDITIONS

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

IN THIS SECTION:

[Turn AppExchange Checkout Data into Insights and Actions](#)

The Checkout Management App (CMA) brings the power of Salesforce to AppExchange Checkout. A beautiful dashboard visually displays AppExchange Checkout data, so it's easy to see how your offerings are performing. Automated email notifications keep customers and team members in the loop whenever activity occurs on your offerings. This feature is available in both Lightning Experience and Salesforce Classic.

[Coming Soon to Branded Login Sites: A Clean, Modern Look](#)

There's nothing wrong with retro style, but the Trialforce branded login site template has been wearing last season's look for awhile. So we updated the template to match the clean, modern login experience of the Salesforce website. Just like before, you can customize the template to match your brand. And now, the template uses responsive design, so your site looks great on any device. This feature is available in Salesforce Classic only.

[Create Trial Orgs with New Edition Templates](#)

The available edition templates for Trialforce Source Organization (TSO) orgs have changed. This change affects both the SignupRequest object and the Environment Hub's Create Org page. This feature is available in Salesforce Classic only.

Log In to Branded Login Test Sites with a New URL

Trialforce branded login sites that previously used *.test.cloudforce.com URLs now use *.test.salesforce.com URLs instead. For example, if you click the **Forgot Your Password?** link on the login page for a branded login site's sandbox, you are now directed to *.test.salesforce.com. This feature is available in Salesforce Classic only.

Encrypt Custom Fields in Managed Packages

When you install a managed package in your Salesforce org with Shield Platform Encryption, you can encrypt custom fields in the package. You can encrypt any field that belongs to one of the encryptable custom field types.

License Management App Now Displays Installations with Long Version Numbers

The Licenses tab of the License Management App (LMA) previously displayed some customer installations, but it didn't display installations with version numbers longer than 10 characters. The Licenses tab now also displays customer installations with version numbers longer than 10 characters.

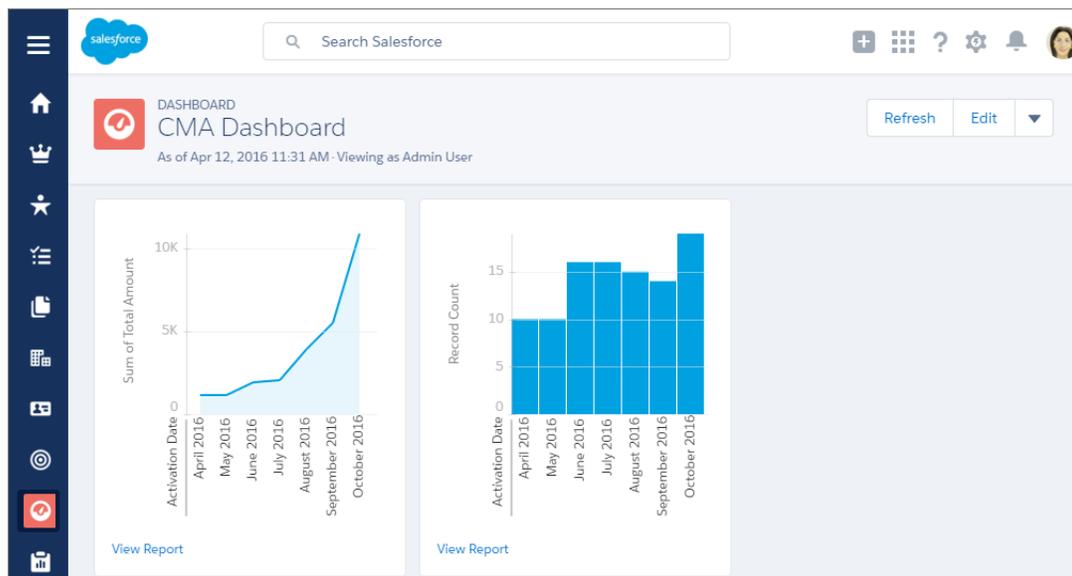
Turn AppExchange Checkout Data into Insights and Actions

The Checkout Management App (CMA) brings the power of Salesforce to AppExchange Checkout. A beautiful dashboard visually displays AppExchange Checkout data, so it's easy to see how your offerings are performing. Automated email notifications keep customers and team members in the loop whenever activity occurs on your offerings. This feature is available in both Lightning Experience and Salesforce Classic.

 **Note:** The CMA is available in English and Japanese to eligible Salesforce partners. For more information on the Partner Program, including eligibility requirements, visit <https://partners.salesforce.com>.

Previously, to get subscription and billing data for AppExchange offerings, you had to leave your Salesforce org. And making that data useful? Well, that was on you. Not anymore. The CMA combines your favorite Salesforce features—think dashboards, reporting, and automation—with AppExchange Checkout data, like subscriptions, invoices, and transactions.

The dashboard gives you a big picture view of your data.



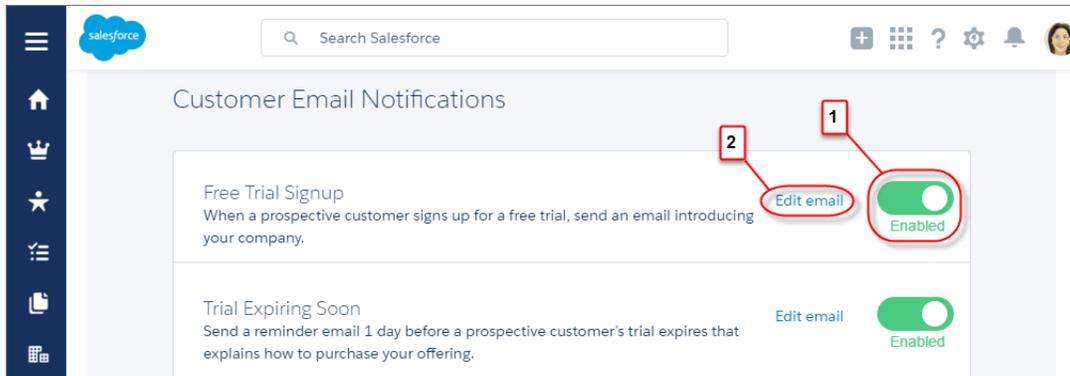
The dashboard is preconfigured to show:

- Revenue by month, so financial performance is always front and center

- New subscribers by month, so it's easy to see where growth is occurring
- Subscription plan by unit, so you know which configurations are popular with customers
- Subscription status by month, so you can stay on top of trials, purchases, and renewals

You can also customize the dashboard using standard Salesforce tools. For a detailed look at your data, view individual subscription plan, subscription, invoice, and transaction records.

To save time communicating with stakeholders, the CMA can send email notifications for situations that you often encounter as a partner, like renewal notices. Enable email notifications as needed (1) and then customize them to reflect your company's identity (2). Not in the mood to customize anything? No worries—we have you covered in each template with friendly and informative default content.



The CMA works only for offerings sold using AppExchange Checkout. You must also have the License Management App installed in your org. For more information about the CMA, see the [ISVforce Guide](#).

SEE ALSO:

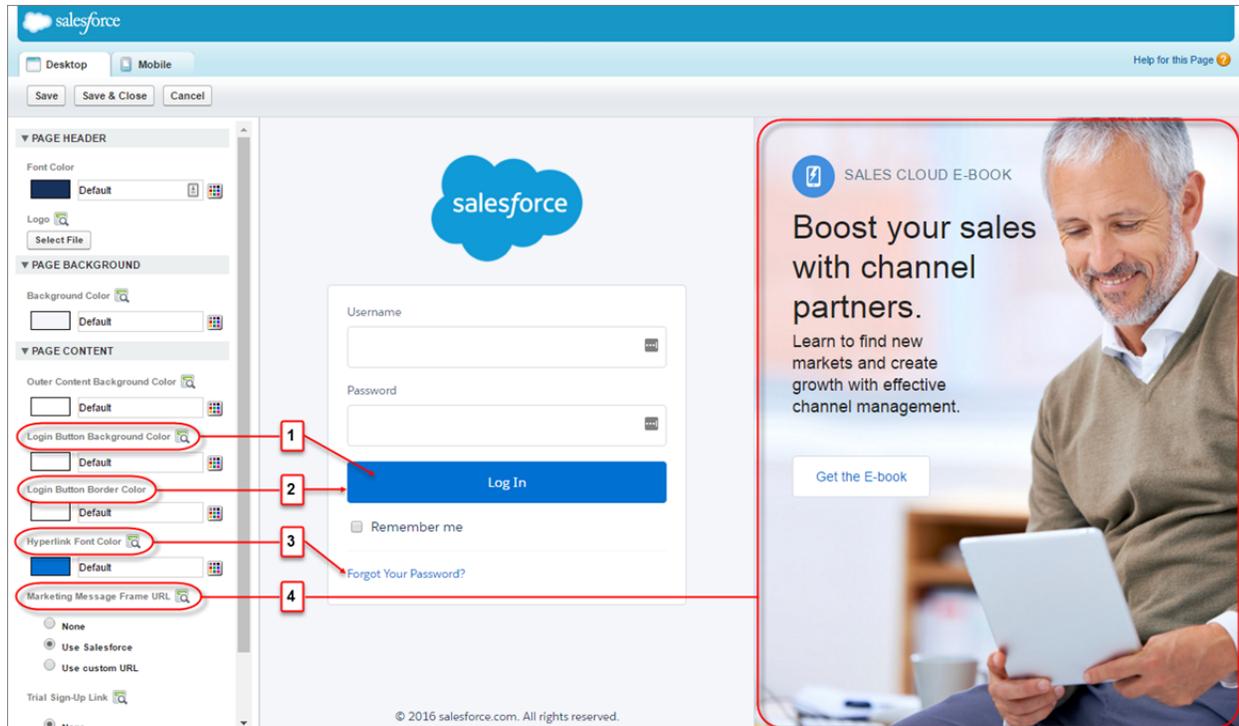
[Lightning Experience: A Modern and Intelligent User Experience](#)

Coming Soon to Branded Login Sites: A Clean, Modern Look

There's nothing wrong with retro style, but the Trialforce branded login site template has been wearing last season's look for awhile. So we updated the template to match the clean, modern login experience of the Salesforce website. Just like before, you can customize the template to match your brand. And now, the template uses responsive design, so your site looks great on any device. This feature is available in Salesforce Classic only.

The redesigned template includes new elements that you can customize.

- Background (1) and border (2) colors of the login button
- Font color of hyperlinks (3)
- Marketing message frame that displays your responsive web content on the right half of the login page (4)



To streamline the look and feel of the site, we removed some customizable elements from the template. For example, you can no longer add a custom background image or a logo hyperlink.

When you receive the Summer '16 release, your existing site is upgraded to the new template. If your site has been customized, we attempt to transfer the customizations to the new template. For new elements, we apply default Salesforce values. Review your site in a Summer '16 sandbox to make sure that everything looks and works as expected.

For more information about Trialforce branded login sites, see the [ISVforce Guide](#).

SEE ALSO:

[Log In to Branded Login Test Sites with a New URL](#)

Create Trial Orgs with New Edition Templates

The available edition templates for Trialforce Source Organization (TSO) orgs have changed. This change affects both the SignupRequest object and the Environment Hub's Create Org page. This feature is available in Salesforce Classic only.

The SignupRequest object's `edition` field and the available Edition values on the Environment Hub's Create Org page have these changes.

- Group Edition is no longer an option.
- For clarity, Trialforce versions of Enterprise and Professional Edition have been renamed to Enterprise TSO and Professional TSO.
- Sales Professional and Service Enterprise Editions have been added.

SEE ALSO:

[SOAP API Developer Guide: SignupRequest](#)

Log In to Branded Login Test Sites with a New URL

Trialforce branded login sites that previously used *.test.cloudforce.com URLs now use *.test.salesforce.com URLs instead. For example, if you click the **Forgot Your Password?** link on the login page for a branded login site's sandbox, you are now directed to *.test.salesforce.com. This feature is available in Salesforce Classic only.

SEE ALSO:

[Coming Soon to Branded Login Sites: A Clean, Modern Look](#)

Encrypt Custom Fields in Managed Packages

When you install a managed package in your Salesforce org with Shield Platform Encryption, you can encrypt custom fields in the package. You can encrypt any field that belongs to one of the encryptable custom field types.

As an admin, this may increase the range of packages you can leverage, because more packages will be encryption-ready out of the box. (Not all of them, though! Check with the app vendor that a package is compatible with encryption before you install it.)

Important: Engage your app vendor to make sure they are prepared to support encrypted custom fields in their package. Then contact Salesforce support to enable this capability for your org.

If you're an app vendor, talk to Salesforce support about getting set up to support customers who encrypt custom fields used by your package.

License Management App Now Displays Installations with Long Version Numbers

The Licenses tab of the License Management App (LMA) previously displayed some customer installations, but it didn't display installations with version numbers longer than 10 characters. The Licenses tab now also displays customer installations with version numbers longer than 10 characters.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Peruse Developer Tool Download Links Without Logging In

We've cleaned up the Tools page in Setup and made it easier to access what you need. This page now contains only three links, and groups the tools into categories: a comprehensive list of Force.com tools and toolkits, integration tools on the AppExchange, and admin and developer tools on the AppExchange. The linked pages feature more tools than the Setup page did, and you can access them without logging in to Salesforce. This feature is available in both Lightning Experience and Salesforce Classic.

Here's a sneak peek at the new Tools page.

Tools

[Force.com Tools and Toolkits](#) - A collection of tools you can use to create, debug, test, and deploy Salesforce apps.

[AppExchange Integration Tools](#) - Partner-supported tools for integrating your Salesforce org with other systems and applications.

[AppExchange Admin & Developer Tools](#) - Partner-supported tools for customizing your Salesforce org.

But what have we done with your links? Don't worry, those resources are still available.

- Our Salesforce-supported tools are on the [Tools and Toolkits](#) page on Salesforce Developers, along with a bunch of other tools and libraries.
- The Developer Console is still under your name in Salesforce Classic or in the quick access menu () in Lightning Experience.

- You can find the partner-supported tools that we used to link to on the AppExchange pages that we link to now, along with their powerful friends. We moved these links to the [AppExchange Integration Tools](#) page.
 - [Jitterbit Cloud Data Loader for Salesforce](#)
 - [Dataloader.io](#)
 - [Informatica Cloud Data Wizard](#)
 - [WebSphere Cast Iron Data Loader](#)
- But what about your beloved Force.com Explorer? Don't worry, it's on the [Tools and Toolkits](#) page—it's listed there under its top-secret alias, "Workbench."

We don't know who moved your cheese, though. You'll need to figure that one out on your own.

SEE ALSO:

[Download the Force.com Migration Tool from a New Location](#)

Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer-leveraging data from any source, and plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time, and measure the impact of each interaction on your business so you can optimize your approach in real time and deliver better results.

For more information, see the Marketing Cloud Release Notes.

SEE ALSO:

[Marketing Cloud Overview](#)

[Marketing Cloud: May 2016 Release Notes](#)

[Marketing Cloud: March 2016 Release Notes](#)

[Marketing Cloud: Earlier Release Notes](#)

[Salesforce Marketing Cloud Facebook Page](#)

Salesforce Overall: Automatic Geocodes and Streamlined Spell-Check

Spring '16 improves your overall Salesforce experience by offering automatic geocodes for your records' addresses and streamlining your spell-check experience.

IN THIS SECTION:

[Salesforce Editions Optimized](#)

Some Salesforce editions include more features than ever before. Some limits have been increased, too. Find out what's changed.

[Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 \(Critical Update\)](#)

This critical update disables access to Lightning Experience and the Salesforce1 mobile browser app when using Microsoft Internet Explorer version 11.

[Automatically Get Geocodes for Addresses \(Generally Available\)](#)

Help your sales and marketing teams find nearby prospects, assign territories and campaigns, and more! All this is a cinch with geocodes. In just a few clicks, you can set up and activate the geocode clean rules for your org. Then, geocodes are added for addresses on existing and new accounts, contacts, and leads. You can set up geocode clean rules in Salesforce Classic only.

[Salesforce Spell Checker is Replaced by Browser-Based Spell Check](#)

As part of our effort to modernize the Salesforce experience and follow best practices for spell checking, we're removing Spell Checker and recommending using your browser's spell check functionality instead. The change affects only Salesforce Classic, because Spell Checker was available only in Salesforce Classic. Browser-based spell check is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app.

[Change a Record's Owner More Easily in Lightning Experience](#)

Your users can now change a record's owner from more places in Lightning Experience. The change owner action is available in the record's highlights panel, the actions bar, and as an icon in the Owner field on all records where the user has permission to change the owner.

[Shortcuts for Currency and Number Fields in Lightning Experience](#)

When you enter a currency amount or any other type of number, you can use the shortcuts **k**, **m**, **b**, **t** to indicate thousands, millions, billions, or trillions. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. The shortcut for trillions is not available in Salesforce Classic.

[Welcome Your Users to Lightning Experience](#)

When users find themselves in Lightning Experience, they're met with a message to welcome them to the new interface. And if users aren't ready to explore Lightning Experience yet? No problem—we provide step-by-step, pop-up instructions that describe how to switch back to Salesforce Classic.

[Get More Insight Into Whether You're Ready for Lightning Experience](#)

Run the Lightning Experience Readiness Check to evaluate some of the Sales Cloud features and customizations you're using in Salesforce Classic. That way, you can learn which are ready for Lightning Experience and which need your attention before you migrate your users.

[Edition Name in Lightning Experience](#)

Your Salesforce organization edition can now be found on the company information page. In Salesforce Classic the edition is also still shown in the browser tab and the Company Profile page.

[Power Through Your Work with Efficient In-App Messaging](#)

Popup messaging just got more efficient, helping users process and act on updates with fewer clicks. When multiple messages are generated, they stack together so users can address them consecutively. And now messages can include multiple actions, so users interact with fewer messages overall. Salesforce provides new API attributes to support enhanced messaging in Lightning Experience and the Salesforce1 mobile browser app.

[More Helpful Presentation of Internal Error Messages](#)

Hopefully your users never experience an internal error message. But for those rare occasions, we've updated the appearance and content of these messages so non-technical users are better able to understand the situation. And optionally, users now can send us information about what they were doing before the error occurred, right from the message. Which helps us make these occurrences even more scarce, so thank you! This feature is available in Lightning Experience and the Salesforce1 mobile browser app.

[Setup Assistant is Retiring in August 2016 for Customers Using Salesforce Classic](#)

Companies using Salesforce Classic have until August 18, 2016 to finish setting up Salesforce using the convenience of Setup Assistant. After that date, you can still set up Salesforce from Salesforce Classic, though you're required to navigate to each Salesforce setup feature individually.

Salesforce Editions Optimized

Some Salesforce editions include more features than ever before. Some limits have been increased, too. Find out what's changed.

See [Salesforce Editions Better Optimized to Meet Your Business Needs](#).

EDITIONS

Available in: **Professional, Enterprise, and Unlimited Editions**

Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11 (Critical Update)

This critical update disables access to Lightning Experience and the Salesforce1 mobile browser app when using Microsoft Internet Explorer version 11.

Salesforce is retiring support for using Lightning Experience and the Salesforce1 mobile browser app with Microsoft Internet Explorer version 11 (IE11) on the Auto-Activation Date. In Summer '16, the Lightning Platform adds a new advanced and flexible security architecture. These advances depend on a number of security standards that are built into modern browsers. Unfortunately, Internet Explorer 11 doesn't support these standards.

See "[Retirement of Support for Accessing Lightning Experience and the Salesforce1 Mobile Browser App Using Microsoft Internet Explorer version 11](#)" for details.



Note: Access to Communities and to the Salesforce1 downloadable apps are unaffected by the IE11 deprecation and this critical update.

If you don't activate this critical update now:

- Lightning Experience users see a notification when they access Lightning Experience using IE11. This notification informs them that IE11 won't be supported in the future.

If you have your own strategy for transitioning your users away from IE11, select the **Disable Lightning Experience IE11 Support Deprecation Notification** option in the **User Interface** section in Setup.

- Salesforce1 mobile browser users are unaffected.

We recommend that you test this update in a sandbox or Developer Edition org to verify the behavior of browsers your org supports before enabling it in your production org.

To activate this critical update:

- From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**.
- Click **Activate** for "Disable Access to Lightning Experience and the Salesforce1 mobile browser app from Microsoft Internet Explorer 11".

SEE ALSO:

[Lightning Experience Bids Farewell to Internet Explorer 11](#)

EDITIONS

Available in all editions

Automatically Get Geocodes for Addresses (Generally Available)

Help your sales and marketing teams find nearby prospects, assign territories and campaigns, and more! All this is a cinch with geocodes. In just a few clicks, you can set up and activate the geocode clean rules for your org. Then, geocodes are added for addresses on existing and new accounts, contacts, and leads. You can set up geocode clean rules in Salesforce Classic only.

EDITIONS

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

 **Important:** Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

Geocodes identify a location using latitude and longitude. Geocodes also have an associated accuracy rating. Geocodes are added to the pre-existing latitude and longitude fields on accounts, contacts, and leads. The accuracy field is also populated. By default, these fields aren't visible on records, but you can check them out in a few ways, including using [custom formula fields](#) and querying the Salesforce API.

Geocodes are added only for some standard addresses.

- **Billing Address** on accounts
- **Shipping Address** on accounts
- **Mailing Address** on contacts
- **Address** on leads

Person accounts are not supported.

 **Example:** You add an account with a value of *One Market Street, San Francisco, CA 94105-5188, United States* for the **Billing Address** field. When you save this account, values for the **BillingLatitude**, **BillingLongitude**, and **BillingGeocodeAccuracy** fields are added.

- *37.793819* to **BillingLatitude**
- *-122.395089* to **BillingLongitude**
- *Address** to **BillingGeocodeAccuracy**

*An **Address** accuracy rating means that the latitude and longitude represent a point that's in the same building as the address on the record.

IN THIS SECTION:

[Set Up Geocode Clean Rules](#)

In a few steps, you can set up and activate your Data.com geocode clean rules. Then, geocodes are automatically added to existing accounts, contacts, and leads. New accounts, contacts, and leads get this information when they're saved.

SEE ALSO:

[Automatically Enrich Leads with Critical Company Information \(Generally Available\)](#)

[Lightning Experience: A Modern and Intelligent User Experience](#)

Set Up Geocode Clean Rules

In a few steps, you can set up and activate your Data.com geocode clean rules. Then, geocodes are automatically added to existing accounts, contacts, and leads. New accounts, contacts, and leads get this information when they're saved.

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

1. From Setup, enter *Clean Rules* in the *Quick Find* box, then select **Clean Rules**.
2. Edit a geocode clean rule. There are four [geocode clean rules](#) available.
3. Review your clean rule settings.

The screenshot shows the 'Edit Clean Rule' page for a 'Contact Geo Clean Rule for Mailing Address'. The page is divided into two main sections: 'Clean Rule Details' and 'Clean Rule Settings'. In the 'Clean Rule Details' section, the Name is 'Contact Geo Clean Rule for Mailing Address', the Description is 'Cleans Mailing Address geocode information for contacts', the Object is 'Contact', and the Data Service is 'Data.com Geo'. The 'Clean Rule Settings' section includes a checkbox for 'Clean all records when this rule is activated or saved' which is checked. Below this, there are three more checkboxes: 'Bypass Triggers', 'Bypass Workflow Rules', and 'Do not update last modified information', all of which are also checked. There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

4. Save the rule.
5. Activate the rule.
If *Clean all records when this rule is activated or saved* is selected, geocodes are automatically added to all existing records. New records automatically get geocodes when they're saved. Existing geocode values are overwritten.
6. Repeat this process for the other geocode clean rules.
7. In Salesforce Classic, if you want to be able to check the clean status of the geocode clean rules, add the *Clean This Record with Data.com* related list to the page layout for accounts, contacts, and leads. (In Lightning Experience, this step isn't necessary!)

EDITIONS

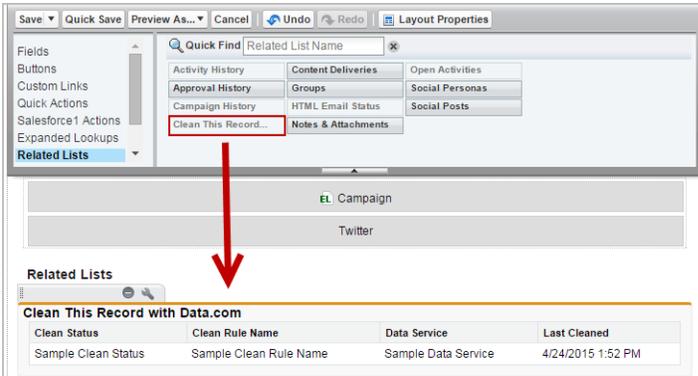
Available in: Salesforce Classic

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To set up and activate clean rules:

- "Customize Application"



Salesforce Spell Checker is Replaced by Browser-Based Spell Check

As part of our effort to modernize the Salesforce experience and follow best practices for spell checking, we're removing Spell Checker and recommending using your browser's spell check functionality instead. The change affects only Salesforce Classic, because Spell Checker was available only in Salesforce Classic. Browser-based spell check is available in Lightning Experience, Salesforce Classic, and the Salesforce1 mobile browser app.

EDITIONS

Available in all editions

Spell Checker worked in certain text areas within Salesforce. In its place, you can use any supported browser's built-in spell check feature within text fields. As with Spell Checker, browser-based spell check doesn't work for select Salesforce features, like Chatter Desktop or inline edit for cases. Enable browser-based spell check via your browser's settings.

For standard rich text areas, browser-based spell check works in all the same fields where Spell Checker worked. (There are a few standard rich text fields where neither spell check tool works.) If you have custom rich text fields, you're in luck. Browser-based spell check works in all custom rich text fields.

Which browsers are supported depends on whether you're using Salesforce Classic or Lightning Experience. See [Supported Browsers](#) for details. And check out [Requirements for the Salesforce1 Mobile App](#) to learn about supported mobile browsers.



Note: Microsoft® Internet Explorer version 9 doesn't include built-in spell check. Microsoft no longer supports Internet Explorer version 9.

SEE ALSO:

[Salesforce Help: Requirements for the Salesforce1 Mobile App](#)

Change a Record's Owner More Easily in Lightning Experience

Your users can now change a record's owner from more places in Lightning Experience. The change owner action is available in the record's highlights panel, the actions bar, and as an icon in the Owner field on all records where the user has permission to change the owner.

SEE ALSO:

[Lightning Experience: A Modern and Intelligent User Experience](#)

[Salesforce1: Change a Record's Owner](#)

Shortcuts for Currency and Number Fields in Lightning Experience

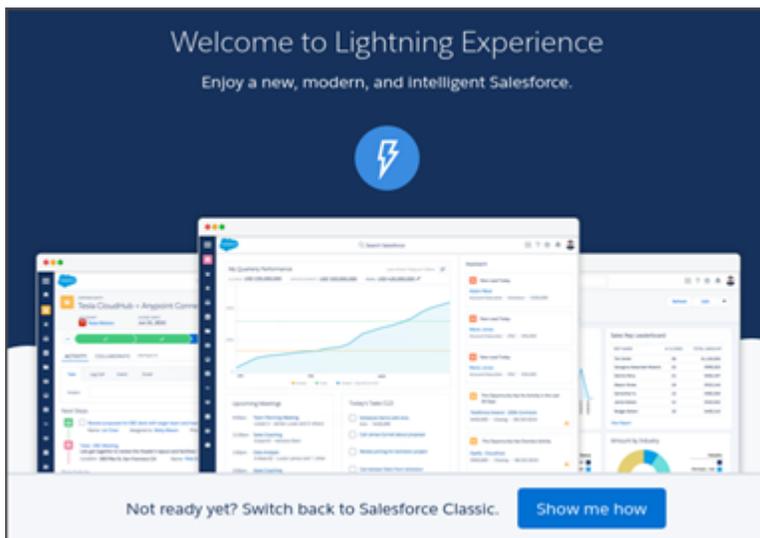
When you enter a currency amount or any other type of number, you can use the shortcuts **k**, **m**, **b**, **t** to indicate thousands, millions, billions, or trillions. This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app. The shortcut for trillions is not available in Salesforce Classic.

For example, entering `100k` appears as `100,000` in the goal editor on the performance chart of the Lightning Experience Home page. Similarly, you can use these shortcuts in any currency or number field, such as the `Amount` field on the Opportunity record edit page. However, these shortcuts are not supported in filter criteria.

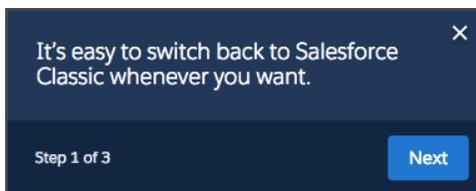
Welcome Your Users to Lightning Experience

When users find themselves in Lightning Experience, they're met with a message to welcome them to the new interface. And if users aren't ready to explore Lightning Experience yet? No problem—we provide step-by-step, pop-up instructions that describe how to switch back to Salesforce Classic.

After the Summer '16 release, every user who switches to Lightning Experience, and those who are already working in the new interface, see the welcome message once.



Clicking **Show me how** walks users through the steps to return to Salesforce Classic, right from the new interface.



 **Note:** After you've enabled Lightning Experience, new users you add to Salesforce don't see the welcome message.

Get More Insight Into Whether You're Ready for Lightning Experience

Run the Lightning Experience Readiness Check to evaluate some of the Sales Cloud features and customizations you're using in Salesforce Classic. That way, you can learn which are ready for Lightning Experience and which need your attention before you migrate your users.

After you kick off the evaluation, you get a report with an impact assessment on the features and customizations we evaluated. We also give you our recommendations on taking next steps.

The readiness check evaluates several of your Sales Cloud features, including unsupported tabs, objects, custom buttons, and links.

You can kick off the Lightning Experience Readiness Check from the Migration Assistant in Setup. Then, we email you your readiness report.

Keep in mind that if your company has [set IP restrictions for Salesforce](#), those restrictions could prevent you from running the readiness check. Work with your IT team to learn if you can lift or alter restrictions.

Check back in the coming months to learn about improvements and additions, including evaluations for more of your features and customizations.

USER PERMISSIONS

To run the readiness check

- "Customize Application"

Edition Name in Lightning Experience

Your Salesforce organization edition can now be found on the company information page. In Salesforce Classic the edition is also still shown in the browser tab and the Company Profile page.

You can check your edition on the Company Information page.

1. From Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information**.
2. **Organization Edition** appears in the lower right.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Power Through Your Work with Efficient In-App Messaging

Popup messaging just got more efficient, helping users process and act on updates with fewer clicks. When multiple messages are generated, they stack together so users can address them consecutively. And now messages can include multiple actions, so users interact with fewer messages overall. Salesforce provides new API attributes to support enhanced messaging in Lightning Experience and the Salesforce1 mobile browser app.

EDITIONS

Available in all editions

Stacked Messages

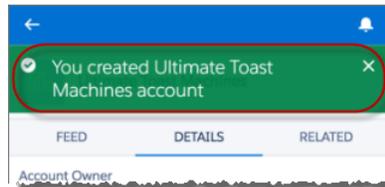


Note: In the Salesforce1 mobile browser app, multiple messages are displayed sequentially instead of stacked on top of each other.

Message That Includes Multiple Actions



Toast Message in the Salesforce1 Mobile Browser App



SEE ALSO:

[Improve App-Level Messaging with Powerful, Accessible Toasts](#)

More Helpful Presentation of Internal Error Messages

Hopefully your users never experience an internal error message. But for those rare occasions, we've updated the appearance and content of these messages so non-technical users are better able to understand the situation. And optionally, users now can send us information about what they were doing before the error occurred, right from the message. Which helps us make these occurrences even more scarce, so thank you! This feature is available in Lightning Experience and the Salesforce1 mobile browser app.

EDITIONS

Available in all editions

Setup Assistant is Retiring in August 2016 for Customers Using Salesforce Classic

Companies using Salesforce Classic have until August 18, 2016 to finish setting up Salesforce using the convenience of Setup Assistant. After that date, you can still set up Salesforce from Salesforce Classic, though you're required to navigate to each Salesforce setup feature individually.

Setup Assistant remains available for companies using Lightning Experience.

To learn how to set up Salesforce Classic after Setup Assistant is retired, see "End of Life for Salesforce Classic Setup Assistant" in the Salesforce Help.

EDITIONS

Available in: Lightning Experience

Available in all editions

SEE ALSO:

[Knowledge Article: End of Life for Salesforce Classic Setup Assistant](#)

Critical Updates: New Security Architecture Introduced for Lightning Components

This release includes a critical update that affects users who access Lightning Experience or Salesforce1 from IE11. Additionally, if you use Lightning components, Visualforce, flows, or approvals, it includes critical updates that probably affect your customizations.

To ensure a smooth transition, each critical update has an opt-in period, which ends on the auto-activation date that's displayed on the Critical Updates page in Setup. During this period, you can manually activate and deactivate the update as often as you need to evaluate the impact on your organization and modify affected customizations. After the opt-in period has passed, the update is automatically activated. For more details, see [Critical Updates](#).

Enhance Security with LockerService

LockerService is a powerful new security architecture for Lightning components that is a critical update for this release. LockerService enhances security by isolating individual Lightning components in their own containers. LockerService also promotes best practices that improve the supportability of your code by only allowing access to supported APIs and eliminating access to non-published framework internals.

Enhance Security with LockerService for Communities

This critical update enables LockerService security for Lightning components in Communities only. It's separate from the general LockerService critical update, which activates the LockerService security enforcements throughout your Salesforce org, but not in Communities.

Enforce Access Check Errors

This critical update enforces access check violations for Lightning resources. Previously, the access violations only generated warnings. Improved access check enforcement enables component authors to have greater control over how their components are used.

Disable Access to Lightning Experience and the Salesforce1 Mobile Browser App from IE11

This critical update disables access to Lightning Experience and the Salesforce1 mobile browser app when using Microsoft Internet Explorer version 11.

Disable Custom DocTypes in Visualforce Markup

This critical update changes the rules for Visualforce markup to no longer allow the use of custom docTypes.

"PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" Critical Update Postponed

In Summer '15, we changed the behavior of the `getContent()` and `getContentAsPDF()` methods of the `PageReference` object. This change was released as a critical update named "PageReference getContent() and getContentAsPDF() Methods Behave as Callouts" and was scheduled for auto-activation in Summer '16. The auto-activation date has been postponed until Winter '17.

Trust Percent Values in Flow sObject Variables Again

Have you added special calculations to your flow to get the right output for a percent field? This critical update lets you remove those workarounds.

Make Sure Records That Are Submitted Behind the Scenes Are Routed to the Right Approval Process

When records are submitted for approval, Salesforce automatically makes sure that the record meets the entry criteria for the approval process. This critical update does the same for the submitting user when records are submitted behind the scenes by making sure that user is an allowed submitter.

Help and Training

We added Trailhead modules and walkthroughs and instructional videos.

IN THIS SECTION:

[Walkthroughs](#)

A walkthrough is a series of interactive steps that guide you through a task or feature. Before you start a walkthrough, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce.

[Videos](#)

We created and updated a number of instructional videos to help your users learn about new and improved Salesforce features.

Trailhead Modules

Looking for a good way to get started with Salesforce or dive into a new feature? Meet Trailhead, a fun, guided, and interactive tool to learn Salesforce. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Trust and Compliance Documentation

The Salesforce Trust and Compliance Documents have undergone seasonal updates.

Walkthroughs

A walkthrough is a series of interactive steps that guide you through a task or feature. Before you start a walkthrough, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce.

Important: A walkthrough guides you through your own Salesforce account, so you're actually making changes to the data in your org as you go through the steps. If you're concerned about making these changes, follow the walkthrough in a sandbox account or other test environment.

Feature	Walkthroughs	You'll need...
Permission Set Licenses	  Walk Through It: View Permission Set Licenses and Assignments	"View Setup and Configuration"
Milestones	  Walk Through It: Create a Milestone	<ul style="list-style-type: none"> • "Manage Entitlements" AND "Customize Application" • Entitlement management enabled

Videos

We created and updated a number of instructional videos to help your users learn about new and improved Salesforce features.

- The new  [Set Up Contacts to Multiple Accounts](#) video shows—you guessed it!—how to set up Contacts to Multiple Accounts. This new feature lets users relate a single contact to multiple accounts so they can track the relationships between people and businesses and avoid creating duplicate records.
- The new  [Relate a Single Contact to Multiple Accounts](#) video introduces users to Contacts to Multiple Accounts and shows them how to relate a contact to more than one account. Tracking and managing relationships between people and their businesses has never been so easy.
- The new  [Prospecting Insights in Lightning](#) video shows users how to engage customers and close deals with Data.com Prospecting Insights in Lightning Experience.

Trailhead Modules

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Check out Trailhead at <https://developer.salesforce.com/trailhead> and find the right trail for you. These are the latest modules.

Expand Your Reach with Communities

Get the tools you need to get started with Salesforce Community Cloud.

Entitlement Management

Deliver on the promise of great service to your customers with rules you create.

Case Feed

Gain instant visibility into the timeline of a support case with a flexible, feed-based layout.

Service Console Customization

Customize the Service Console to increase agent productivity and make your customers love you.

ISV App Strategy

Identify the tools and technologies needed to build your ISV app.

ISV App Development

Roll up your sleeves and develop, package, and test your first ISV app.

ISV Business Planning

Target your market, create a go-to-market plan, and build your team for your new business.

Trust and Compliance Documentation

The Salesforce Trust and Compliance Documents have undergone seasonal updates.

Notices and Licenses

The following changes have been made in the **Notices and Licenses Documentation**:

Salesforce

Renamed the Account News Features section to Account Intelligence Features.

Updated information in Account Intelligence Features section.

Updated Third Party Platform providers in the Files Connect Feature section.

Updated open source notices and added link to new open source website.

Analytics Cloud

Updated open source notices and added link to new open source website.

ExactTarget

Clarified language in Restricted Uses of Information section.

Updated Third Party Notices section to reflect current set of third-party application integrations.

Marketing Cloud

Updated Third Party Notices section to reflect current set of third-party application integrations.

Predictive Intelligence

Clarified language in Services Covered section.

Desk.com

Updated Third Party Notices section to reflect current set of third-party application integrations.

Updated open source notices and added link to new open source website.

Heroku

Clarified language in Services Covered section.

Added External Facing Services Policy section.

Clarified language in Purpose of this Documentation section.

Added Customer Data section.

Renamed Heroku Add-ons section to Heroku Elements.

Updated information in Heroku Elements section.

Updated information in Heroku Dev Center section.

Updated information in Distributed Software section.

Added External Resources section.

Added Heroku Services Policies section.

Data.com

Updated open source notices and added link to new open source website.

SalesforceIQ

Updated open source notices and added link to new open source website.

Pardot

Clarified language in Customer Data section.

Updated Third Party Notices section to reflect current set of third-party application integrations.

Updated Distributed Software section to reflect current set of distributed software.

Updated open source notices and added link to new open source website.

Work.com

Updated open source notices and added link to new open source website.

Financial Services Cloud

Updated open source notices and added link to new open source website.

Health Cloud

Updated open source notices and added link to new open source website.

IoT Cloud

Updated open source notices and added link to new open source website.

Steelbrick

Updated open source notices and added link to new open source website.

Security, Privacy, and Architecture

The following changes have been made in the **Security, Privacy, and Architecture Documentation**:

Salesforce

Services Covered: Added Work.com and Analytics Cloud (except for the Playground demonstration environment).

Architecture: Updated EU4 data residency to Germany as primary and UK as secondary and revised description of Analytics Cloud environment.

Third Party Architecture: Added descriptions of content delivery networks and instructions on controlling the cache duration.

Audits and Certifications: Added ISO 27018 certification and clarified that Work.com is not part of the existing ISO, SOC or PCI third party attestations and won't be covered in SOC reports until the period ending April 31, 2016.

Sensitive Personal Data: Clarified description of data that may not be submitted to Analytics Cloud and Work.com.

Analytics Cloud

Included in scope of PCI certification.

Updated description of process for deletion of Customer Data post-termination.

ExactTarget

Services Covered: Clarified that two new products, Predictive Email and Predictive Web, are not within the scope of this documentation.

Security Controls: Clarified that certain controls are optional, and can be enabled by the customer.

Predictive Intelligence

Services Covered: Clarified that two new products, Predictive Email and Predictive Web, are within the scope of this documentation.

Radian6

Services Covered: Removed references to Social Studio, which is now covered by separate Security, Privacy, and Architecture Documentation.

Audits and Certifications: Added "TRUSTe Privacy Seal" to the list of audits and certifications applicable to the Radian6 Services.

Buddy Media

Services Covered: Removed references to Social Studio, which is now covered by separate Security, Privacy, and Architecture Documentation.

Salesforce Infrastructure: Added disclosure that Buddy Media features involving email functionality are provided using Salesforce's ExactTarget email platform.

Social.com

Services Covered: Clarified that a new product, Advertising Campaigns, is within the scope of this documentation.

Data.com

Audits and Certifications: Updated SOC 3 link from https://cert.webtrust.org/soc3_salesforce.html to http://content.trust.salesforce.com/export/sites/salesforce_trust/pdf/misc_systrust.pdf.

SalesforceIQ

Third-Party Architecture: Edited language to clarify that data other than only screenshots may be hosted on third party infrastructure as part of the SalesforceIQ support offering.

Social Studio

Created new Security, Privacy, and Architecture Documentation for Social Studio. Customers can now consult this single document instead of referencing both the Buddy Media and Radian6 Security, Privacy, and Architecture Documentation.

Pardot

Added Salesforce Architecture section.

Third Party Architecture: Removed description of third party email provider that is no longer used and deleted Softlayer references since it is no longer used.

Security Controls: Revised disclosure on Customer Configurable Security and added security controls for Email Login Verification and Domain Whitelisting.

Security Procedures, Policies and Logging: Specified that audit and security logs will be kept for one year.

Physical Security: Included a link to overview of AWS security processes.

Disaster Recovery: Changed target recovery objectives from hours to business days.

Sensitive Personal Data: Add birthdates as a prohibited sensitive data category.

Other Salesforce Products

desk.com

Desk.com is an all-in-one customer support app for small businesses and growing teams.

For information on new features, go to the [Desk.com Product Updates Blog](#).

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).