



Salesforce Summer '18 Release Notes

Salesforce, Summer '18

Blaze new trails to personalized customer experiences



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SALESFORCE SUMMER '18 RELEASE NOTES

The Summer '18 release delivers more personalized and integrated customer journeys while enabling your team to work smarter with new levels of data insight across your org.

IN THIS SECTION:

[How to Use the Release Notes](#)

Our release notes offer brief, high-level descriptions of enhancements and new features. We include setup information, 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 '18 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

[Supported Browsers](#)

We've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

[Salesforce Overall: Improved Productivity in Lightning Experience with More Ways to Discover, Adopt, and Personalize](#)

Encourage users to discover and adopt Lightning Experience with automatic switching and feature prompts. Track Lightning Experience usage to better understand and optimize your adoption. See where you're going before you click with shorter and easier to read URLs. Personalize the navigation bar in Lightning Experience with fewer clicks. Make global search more specific with object-level searching, and use synonym groups without having to create them. Show what's most important to you in list views with more-detailed filters. Organize records with theme-based topics. Enhance your console app with guided flows, improved link sharing, and more Lightning Console JavaScript APIs. Get guidance on keeping individuals' personal data secure and private.

[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.

[Essentials: Sales and Service for Small Business](#)

Are you ready to take your small business to new heights? With Salesforce Lightning Essentials, you can easily manage your business' sales and service needs in one place. Grow lightning fast and help customers succeed with Sales and Service Lightning Essentials.

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

We're giving you more out-of-the-box and custom AI features to help you get the most from the world's smartest CRM. Here are the newest ways that Einstein helps you predict what's going to happen next in your business and know what next steps to take.

[Sales: Intelligent Forecasting, Improved Campaign Management, and Lightning Dialer Enhancements](#)

Get smarter with Einstein Forecasting, now generally available. Control access to campaign members, and add them by account. Improve your reps' performance with Lightning Dialer features and other tools.

[Service: Einstein Bots, Lightning Guided Engagement, and Field Service in Lightning Communities](#)

Ease your team's workload by building Einstein Bots to deflect routine cases like password requests. Use Lightning Guided Engagement to guide your agents through multi-step actions, like call scripts, with an ordered list of flows right inside the console. You can even use Lightning Guided Engagement with Live Agent chats. Take advantage of robust field service features like Snap-ins Appointment Management (beta), full Lightning community support, and an optimization tool to handle schedule disruptions. Enjoy more choices in how to route work items to agents with Skills-Based Routing for Omni-Channel and External Routing for Omni-Channel. Use translation management features in Lightning Knowledge, including side-by-side comparisons, smart links for translated articles, and the Lightning Knowledge Migration Tool. Finally, manage cases more efficiently with case teams and email drafts.

[Analytics: Reports and Dashboards and Einstein Analytics](#)

On the Reports and Dashboards side, this release brings the Lightning Experience report builder, now generally available, Lightning Experience joined reports (beta), enhanced subscriptions, and much more. For Einstein Analytics, Einstein Discovery recommendations in Salesforce objects is now generally available, conditional formatting in dashboards is here, as well as many other new features.

[Communities: Pre-Built Themes, Sharing Sets for Everyone, Pinned Posts, and Closed Threads](#)

The Community Cloud makes waves this summer with fabulous new features. We're excited to introduce ready-made themes in Community Builder, so you can change the look and feel of your community with a few clicks. We also expanded support for sharing sets, now available to Customer Community Plus and Partner Community users. Add some exciting new features on feeds, such as pinning posts and closing threads. Who needs a summer vacation when there's so much fun in your community?

[Chatter: Trailhead Badges on User Profiles, Record Links in Posts and Comments, Pinned Posts and Community Streams Generally Available](#)

Your users can now see earned Trailhead badges on their profile pages. You can link to any type of record that is available in your org from a post or comment. Pinned posts and cross-community streams are now generally available.

[Files: Library Management Updates, Topics on Files, and Quip Lightning Component](#)

A smoother files workflow is here. Manage libraries right from Lightning Experience, including the power to update membership and delete empty libraries. Pop the Quip Lightning component onto records to let your users access Quip right from the record. Curate your files with topics, and find recently viewed files in a jiffy in the recent files dropdown.

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

The Salesforce mobile apps help your users stay productive on the go. We added Chatter enhancements, email notifications for cases, and subjects for tasks and events, just to name a few.

[Financial Services Cloud: Person Accounts Enhancements, Customized Group Relationship Views, Rollup Enhancements, and Salesforce Inbox and Pardot Compatibility](#)

View consolidated, customizable client profiles with person accounts—now certified for use on Salesforce mobile, Advisor Analytics, and partner and customer communities. Show key customer relationships with enhanced group relationship views. Enhanced rollups let users quickly take action and win opportunities from the Primary Group view. Accelerate data loads by disabling rollup-by-lookup calculations. Boost advisor and banker productivity in Financial Services Cloud with Salesforce Inbox and Pardot. And there's lots more, including a Teller Access permission set and usability and accessibility enhancements.

[Health Cloud: More Modular, Easier EHR Integration, Field Service Lightning Support](#)

Health Cloud now supports Field Service Lightning, and you can choose from a variety of out-of-the-box ways to send and receive electronic health records (EHR) data using the HL7 v2 standard.

[Customization: More Genius via Clicks, External Services and Time Fields Generally Available, Improved Error Handling](#)

Customize your way to a smarter org with the new Einstein Next Best Action pilot. We've taken several features from pilot or beta to generally available: External Services, custom time fields, Lightning components as flow actions, and flow stages. If you frequently use Lightning pages, processes, or flows, enjoy improved error handling.

[Security and Identity: New Verification and Login Methods, More Email and Field Encryption, Health Check Enhancements, and Easier My Domain Management](#)

You can now control how long ID tokens and verification links are valid and let your customers log in using verification codes. Encrypt more fields, filter encrypted data, and take more control over your key material. Assess your Health Check score at a glance with a grade. Rename your subdomain without contacting Salesforce Customer Support.

[Salesforce IoT: Troubleshoot Orchestrations with Trackers, Monitor Orchestrations with Activity Log](#)

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. This release includes a new Tracker feature to help you troubleshoot issues with new orchestrations. It also includes an Activity Log for monitoring live orchestrations to make sure that everything is working right.

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

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages.

[Marketing: Lightning Homepage, Google Analytics 360 Integration, and Other Features](#)

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.

[Critical Updates](#)

This release includes new critical updates for processes, flows, HTML-based email templates, and sandbox URLs. And we're postponing a critical update for `@AuraEnabled` Apex controllers.

[Help and Training](#)


We added Trailhead modules and instructional videos. We also updated our Trust and Compliance documentation.

[Other Salesforce Products and Services](#)

How to Use the Release Notes

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

- We offer [PDF](#) and [HTML](#) versions.
- For the HTML version, your browser's settings determine the language you see. To change the language, scroll to the bottom, click **Change Language**, and select a language.
- The release notes include details about new and modified features, not known issues, which you can access from the [Salesforce Known Issues site](#).

 **Note:** Until the new release is available to you, links from release notes to Salesforce Help, implementation guides, developer guides, and other documentation don't work. And sometimes the links point to material from the previous release.

Some of our documentation has preview versions available several weeks before the release. To access a preview version on [Salesforce Developers](#), select **Preview** from the Documentation Version dropdown list.

IN THIS SECTION:

[Get the Lowdown on What's Coming Your Way More Quickly](#)

See the most important details about each feature or change with our new format for the release notes. We designed it to make your release readiness planning easier. We give you the what, where, when, who, why, and how. It's quicker for you, because you've got a lot to do!

[Use Filters to Zero In on the News That Matters Most](#)

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

[Know 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 orgs continue to use Salesforce Classic—either exclusively for a few releases or in tandem with Lightning Experience as it 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 Note 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.

Get the Lowdown on What's Coming Your Way More Quickly

See the most important details about each feature or change with our new format for the release notes. We designed it to make your release readiness planning easier. We give you the what, where, when, who, why, and how. It's quicker for you, because you've got a lot to do!

Where: This change applies throughout the release notes, except for a few entries in the Developer section that list changes in our APIs.

Who: The new format is available to you and anyone else who uses the release notes to help plan for what's coming.

Why: The release notes are a key resource that you rely on as you prepare for each release, and you want to know:

- What's new or different?
- Where do these changes apply?
- When do these changes happen?
- Who do these changes affect?
- Why should I care about these new features and changes, and what do they mean for me and my users?
- How do I get this new stuff set up?

But as you'll see, not all topics include the six pieces of info. For example, when we describe a new option in Setup that's available when the release goes out, we don't include a **When** section, because we use that section to tell you about delayed availability.

How: This new format is already at your fingertips—no setup required! You'll see it as you peruse the Summer '18 Release Notes. Want to share your feedback on our new format or how you use the release notes? Or do you have suggestions for other improvements you'd like to see? We'd love to hear from you. Share your thoughts, suggestions, and ideas in our [Salesforce Release Notes Survey](#).

Use Filters to Zero In on the News That Matters Most

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

Experience

See which features are available in Lightning Experience, Mobile, and Salesforce Classic.

Edition

Which feature enhancements are available to you depends on your edition. Filter the release notes to show only enhancements that are available in your edition.

Feature Impact

Some features require you to enable or configure them before users can get the benefits. As an admin, filter the release notes to focus on, or hide, just those features. Or maybe you want to see only the features that are automatically enabled for your users.

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.

Experience

Lightning Experience

Mobile

Salesforce Classic

Edition

Professional Edition ▾

Feature Impact

Enabled for users ▾

Product Area

Analytics

API

Chatter

Email Integration

Communities

Data.com

Force.com Customization

Force.com Development

Mobile

Sales

Service

Work.com

[Fewer Product Areas](#) [Reset](#)

You can share your filtered list of release notes with anyone. Select filters, copy the URL, and then distribute that URL however you want.

Know 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 orgs continue to use Salesforce Classic—either exclusively for a few releases or in tandem with Lightning Experience as it 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 a couple of examples.

- A new Service Cloud feature is available in *both desktop experiences*, so the **Where** section of the release note says "This change applies to both Lightning Experience and Salesforce Classic."

- A new Sales Cloud feature is available in Lightning Experience *only*, so the **Where** section of the release note says “This change applies to Lightning Experience only.”

If a *key* feature is also available in the Salesforce app, we mention that in the **Where** section of the release note. But you can also check the Mobile section for a complete list of what's new.

You Asked for It!

We delivered the features you asked for on IdeaExchange.

IdeaExchange	Idea delivered
Salesforce Overall	
Include Topics in Lightning	Organize Records with Topics (<i>partially delivered</i>)
Sales	
Mass Email All Campaign Members from the Campaign view	Send List Emails to Campaign Members
Lightning Experience - Lead and Contact List View - Campaign filter	Filter Lead and Contact List Views by Campaign
Forecast Based on Revenue/Quantity Schedule Date	Predict Sales More Accurately with Schedule and Product Date Forecasts in Lightning Experience
Ability to Sort List Task List Views in Lightning	Do More with Tasks from the List View
Make Task List Configurable in Tasks Page of Lightning Experience	
Support Custom List Views for Tasks Tab in Lightning Experience	
Task Subject Field as Picklist in Lightning	Create Predefined Subjects for Tasks and Events
Auto-Populate a Task Subject with a Template	
Ability to Assign Tasks in Lightning to Multiple Users	Create Copies of a Task for Colleagues
Create HTML Lightning Email Templates	Boost the Effectiveness of Email Templates with HTML
Create Quality HTML Email Templates with Editable Regions	
Lightning Email Template Management	Manage Lightning Email Templates in One Place
Manage Public Templates Without View and Setup Configuration	
Visualforce Email Templates in Lightning Experience	Put Your Visualforce Email Templates to Work in Lightning Experience
Mass Email All Campaign Members From the Campaign View	Send List Emails to Campaigns and Campaign Members
Relate Mass Emails to Other Records, Such as Account, Opportunity, and Campaign	
Enable Drag and Drop Functionality for Lightning Calendar	Update Calendar Items by Dragging Them in Lightning Experience
Access Person Account Setup in Lightning	Set Up Person Accounts in Lightning Experience
Enable Product Schedule in Lightning Experience	Products: Work with Schedules in Lightning Experience

IdeaExchange

Path on Contacts

Idea delivered

Guide Reps Toward Success with Path for Contacts

Reports and Dashboards

Nesting Folders / Sub-folders for Reports and Dashboards

Organizing your Report and Dashboard Folders in Lightning Experience

Display Currency in Dashboard Tables

Chart Enhancements for Dashboards in Lightning Experience

and

Display Whole Units in Lightning Experience Dashboards

and

Show Values in Line Charts in Lightning Experience

Filter by "Old Value" and "New Value" in Field History Reports

Filter Field History Reports by Old and New Values

Printable View for Lightning Experience Reports

Export Reports, Keep the Formatting

and

Export Report Details

Add "Last Run Date" to Reports Tab and Dashboards Tab

Enhance your Report and Dashboard View in Lightning Experience

Group Report Data by Dates in Lightning Experience

Group Reports by Customized Date Granularity

Service

Path on Work Orders

Guide Your Team with Path for Field Service

Auto Save Email Drafts

Save the Day with Private Email Drafts for Cases

Save Draft Emails

Save the Day with Private Email Drafts for Cases

Communities

Enable Sharing Sets for Partner Community users

Use Sharing Sets with All Customer and Partner Licenses (Beta)

Customization

Add Date/Time Field Type to Visual Workflow

Capture Date/Time Values in Flow Screens

Size of Collections in Flow

Update Active Stages and Collections with New Assignment Operators

Better Debugging Capability for Visual Workflows and Workflow Triggers

Debug Your Flows in Cloud Flow Designer

GUI Testing/Debugging for Process Builder & Flows

Process Builder: Error Messages

Demystified Process Errors for Your Users

Include the Organization Id in Flow Instance Error Emails

Get the Org Name in Which a Flow or Process Failed

Choose Who To Send Flow Fault Emails and Process Builder Error Emails To

Control Who Receives Flow and Process Error Emails

IdeaExchange**Idea delivered**

Ability to Change the From Email Address in Approval Processes	Override the Sender for Approval Request Email Notifications
Custom Time Field	Track Time with the Time Field Type (Generally Available)
Flow Designer Needs a Simple Way to "End" a Flow by Navigating to a Record	Use Lightning Components as Flow Actions (Generally Available)
Process Builder - All or None	Enable Partial Save for Create and Update Operations in Processes (Critical Update)
An AppExchange Category to Show Which Apps Work with Person Accounts	AppExchange: New Filters and Profile Enhancements

Development

Add "Switch" or "Case" Statement to Apex	Simplify Your Code with the Apex Switch Statement
Get RecordTypeInfoInfos by API name method	Get the Developer Name for Record Types More Easily
Count the SOQL count() query as a single row query method	The SOQL Count() Function Doesn't Count (As Much) Toward Limits
Add support for clearing PageMessages via Apex	Clear Messages on Visualforce Pages While Testing
Run Compile All Classes after package installation and upgrades	Compile on Deploy (Generally Available)
Apex usage limit 3,000,000 characters can be increased	Apex Code Size Limit Increased
A Trigger Context Enum to represent the current operation and before/after state	New Apex Enums
Use Custom Metadata Types in Formulas/Validation Rules	Update Multiple Validation Rules with Custom Metadata Type Records (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.
- [Customer Success Event Calendar](#). Search by release and register for events.
- [Release Readiness Live](#). Register and make the most of the new features.
- [Summer '18 Release](#). Check out the new features.
- [Summer '18 Release module](#). Get the Summer '18 Trailhead badge.
- [Maintenance Exams](#). Keep your certification updated.

Release Note Changes

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

October 31, 2018

Order Service Validations Added

We introduced a new order service. The order service contains new and modified validations that help you scale your business and improve performance.

Goodbye, Subscription Conversion and Full-Term Net Unit Price Fields

Added a note that the Full-Term Net Unit Price field was deprecated.

Price Book Entry ID Added to Quote Lines

The quote line now contains a Pricebook Entry ID field. When you add a product to a quote and save, the resulting quote line inherits its price book entry ID from the product's price book entry ID. When you order the quote, your order products inherit their price book entry IDs from their quote lines.

September 5, 2018

Removed: Access Account and Opportunity Insights from Your Mobile Device (Beta)

This feature isn't quite ready for showtime, so we're removing it for now while we make improvements. We'll let you know once it's back up.

August 29, 2018

Send List Emails to Campaign Members

Updated description of sending list emails to campaigns.

Learn Why Users Are Switching Back to Salesforce Classic

Announcing the feedback form feature. Users provide feedback when switching from Lightning Experience to Salesforce Classic.

August 15, 2018

Einstein Analytics Plus Now Available, and Einstein Analytics Platform Becomes Einstein Analytics Growth

Announcing new Einstein Analytics Plus product and change from Einstein Analytics Platform to Einstein Analytics Growth.

Make It Easy for Your External Users to Log In to Your Community with Passwordless Login

Updated to reflect that added mobile numbers require users to verify their identity.

Evaluate Your Implementation with Salesforce Optimizer

Updated to announce the release of Salesforce Optimizer version 2.5 with a CVS file and new details in the Unused Report section.

Roll Out the Welcome Mat for New Lightning Experience Users

Updated to announce that a welcome mat starts appearing to users the first time they log in to Lightning Experience. Admins can customize the welcome mat.

August 8, 2018

Encourage Users to Adopt Lightning Experience

Updated to reflect that this feature isn't applied to Developer editions.

See Field Dependencies While Editing a Record Details Page

Updated to identify objects supported by this feature, and feature availability for Lightning Communities.

Link to Your Most Relevant Records from a Post or Comment

Updated to note that, before you can link to records from a feed item, you must call Salesforce Customer Support to enable the Quill editor.

Get Rich Text in Your Mobile View of Community Feeds (Generally Available) on page 381

Updated to clarify that general availability of the rich text editor applies to the mobile view of feeds in communities and not to all mobile views.

August 1, 2018

Health Cloud Analytics Template Lets Health Cloud Customers Get Started with Einstein Analytics—Fast

Added release note announcing Analytics template for Health Cloud customers.

Whitelisted IP Addresses for the Lightning Experience Configuration Converter Have Changed

Added updated whitelisted IP addresses for access to the Lightning Configuration Converter.

July 25, 2018

Secure Topics for Salesforce Sites and Portals (Critical Update)

Changed critical update enforcement date to August 26, 2018.

Pardot Help Site Migration Is Complete

Added a release note announcing the end of the Pardot help site migration.

Salesforce for Outlook Not for Sale in Winter '19

Starting in Winter '19, if you've never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available.

July 18, 2018

Get to Know Service Cloud Mobile with a New Walkthrough

Added a release note for the Service Cloud Mobile walkthrough. Previously, we removed this walkthrough because the Service Cloud Mobile app wasn't available.

New Metadata Types

Added information on two new Metadata types—FlowCategory and LightningBolt.

Parse Debug Logs More Effectively with Updated Log Lines

Indicated that debug log lines now include namespaces for `METHOD_ENTRY`, `METHOD_EXIT`, `CODE_UNIT_STARTED`, and `CODE_UNIT_FINISHED` events.

Display Change for Event Subjects in Calendar

Added a release note about changes to how event subjects display in Calendar entries.

Create Case Teams in Lightning Experience

Updated the edition availability.

July 11, 2018

Access Account and Opportunity Insights from Your Mobile Device (Beta)

Updated release note to denote that Einstein Account and Opportunity Insights are available on the Salesforce mobile app as a beta feature.

Keep All Attached Files When Merging Records

Added a release note for a fix that allows all files shared to records through a Chatter feed post to be merged to the master record when records are merged.

New Banner Encourages Admins to Transition to Lightning Experience

Updated the release date of the new Salesforce Notification Banner to July 10, 2018.

Other Enhancements to Dashboards in Lightning Experience

Added a note saying that Lightning dashboard tables prompt dashboard viewers to refresh the dashboard after 7 days.

ExternalServiceRegistration

Added information about ExternalServiceRegistration object availability in the tooling API.

Removed Field Service Lightning Mobile Android Features

The Communicate Clearly with Offline Chatter Enhancements and Link to the Salesforce App with Related Lists features won't be in the July 17th release of the Field Service Lightning Mobile Android App, version 4.0.

Add Contact Roles on the Go

Added a release note to denote that Contact Roles on opportunities can be added in the mobile app.

Create and Manage Packages More Easily (Beta)

Updated dependencies information for packaging to reflect the new JSON structure accurately.

July 2, 2018

Add Lightning Knowledge to Service Essentials

Updated that Lightning Knowledge is included with Service Essentials; it is no longer an add-on.

June 27, 2018

Salesforce Console API

Updated descriptions for the `login()` and `setServicePresenceStatus()` methods to indicate that you can use these methods to reconnect to Omni-Channel after a connection error.

The Social Case Analytics Template Brings the Power of Analytics to Your Social Customer Service Data

Added new Analytics template that lets Services Cloud customers analyze social case data.

Data Loader 43.0 Keeps Your Data More Secure

Added a release note for Data Loader version 43.0.

Other Enhancements in the Field Service Lightning Managed Package

Added new enhancements in the Field Service Lightning Managed Package.

Online Documentation Parity

Updated and streamlined Field Service Lightning Mobile documentation.

Create and Manage Packages More Easily (Beta)

Added a link to the Salesforce CLI v43 release notes.

Convert JavaScript Buttons to Lightning-Friendly Alternatives With the Lightning Experience Configuration Converter (GA)

Removed restriction for production orgs.

Remove Components from Non-Namespaced Unlocked Packages (Beta)

Added information about how to remove components from non-namespaced unlocked packages.

Get Improved Opportunity Scores

Added a release note announcing that Einstein Opportunity Scoring uses custom fields to calculate scores.

June 20, 2018

Bring Your Financial Services Cloud Data to Life With the Financial Advisor Analytics Template.

Added new Analytics template for Financial Services Cloud customers.

Service Cloud Mobile: Get Case Management on the Go (Generally Available)

Updated the release note with a new release window for the mobile app. Also changed the release note to Generally Available instead of Beta.

Components Now Generally Available

Added a list of base Lightning components that are now generally available.

Changes to How Pardot Treats Prospects in the Recycle Bin

Updated the release note to reflect a functionality change.

New Banner Encourages Admins to Transition to Lightning Experience

Added a new release note announcing that a new Salesforce Notification Banner appears to admins starting June 26, 2018.

TransactionSecurityPolicy Added to New API Objects

Introduced in API version 42.0, this object represents a transaction security policy definition.

Added Two New Service Cloud Modules to Trailhead

Einstein Bots Basics and Field Service Preventive Maintenance are new on Trailhead.

Keep All Attached Files When Merging Records

Added a new release note announcing an update for merging records that retains all Salesforce Files from merged records in the master record.

What's New in Salesforce for Android and iOS

Salesforce for Android and iOS version 16.0 will be available the week of June, 25, 2018. Learn all about the new enhancements for your users.

Personalize Engage Emails with Salesforce Files

Updated the release note to reflect a limitation.

Use the New Apex Access Modifier for Packaging (Beta)

Clarified that the @namespaceAccessible annotation is not enforced when an Apex class is invoked from Visualforce or Lightning controllers.

June 13, 2018

Get Instant Insights About Your Team's Quoting Process with the Quoting Analytics Template

Introducing new Analytics template for analyzing Salesforce configure-price-quote (CPQ) data.

Analyze Field History Data in any Salesforce Object with the Change Analytics Template

Announcing new Analytics template for analyzing change to Salesforce records.

The Campaign Analytics Template Brings the Power of Einstein Analytics to Marketing Campaign Data

Announcing new Analytics template that creates app to analyze marketing campaign data.

View Pardot Marketing Asset Engagement in Salesforce (Beta)

Added a release note announcing a beta marketing asset feature available June 11, 2018 for Salesforce customers with Pardot.

Secure Topics for Salesforce Sites and Portals (Critical Update)

Added a release note for a critical update that turns off topics for external users in Salesforce Sites and Portals created before Summer '13.

New features added to the mid July 2018 release of the Field Service Lightning Mobile App for Android

- [Restrict Creating or Updating Products Consumed by Default](#)

- [See Available Time Slots by Month](#)
- [Support Multiday Appointments](#)
- [Create a Product Request](#)
- [Other Enhancements to Service Reports](#)

Peruvian Currency Format Updated

Added a release note announcing the updated currency format for the Peruvian sol.

Access Account and Opportunity Insights from Your Mobile Device (Beta)

Added a release note about a mobile feature available with the Salesforce for Android and iOS version 16.0 release.

Dependent Picklist to be Updated in Winter '19

New release note to warn of upcoming changes next release.

Salesforce Extensions for VS Code: Two New Debuggers

Added release notes for Salesforce Extensions for Visual Studio Code's new feature: ISV Customer Debugger.

Create and Manage Packages More Easily (Beta)

Added information about changes introduced in Salesforce CLI v43.3 for packaging commands. For `force:package:create`, the `--path | -r` flag is required. (The previous version of the release notes incorrectly listed this parameter's short name as `-p`.) For `force:package:version:update`, the `--description | -d` and `--name | -n` parameters are now `--versiondescription | -e` and `--versionname | -a`, respectively.

Work with Health Cloud Managed Packages in Scratch Orgs

Enterprise and Developer edition scratch orgs include 10 Health Cloud permission set licenses.

lightning:input

Added a note about date and time formatting changes for the `lightning:input` component.

New Default Format Returned for Platform Event Schema

Added information about a change in the `eventSchema` REST API resource for platform events.

Encrypt Fields for Your Activities (Generally Available)

Updated steps for enabling Platform Encryption for Activities fields.

Removed: Get to Know Service Cloud Mobile with a New Walkthrough

Service Cloud Mobile isn't quite ready, so we're removing this walkthrough until the app is out and ready to download. We'll let you know when that happens.

June 6, 2018

Salesforce Console API

Added a release note announcing the Omni-Channel methods that are supported in Lightning Experience.

Convert JavaScript Buttons to Lightning-Friendly Alternatives With the Lightning Experience Configuration Converter (GA)

Added a release note announcing this new generally available feature.

See Only Supported Options in the Process Builder Field Picker

Process Builder no longer displays unsupported options in the field picker.

Engagement Studio Offers Pointers

Added a release note about new warnings in Engagement Studio.

Twitter Changes Posting Policy

Added a release note about a new limitation in social sharing from Pardot to Twitter.

Let Prospects Repeat Engagement Programs (Beta)

Added a release note about repeating engagement programs (beta).

Have Some Fun with Emoji in Emails

Added a release note about support for emoji in email bodies and subject lines.

Preview Emails as a Specific Prospect

Added a release note about Preview As functionality for Pardot emails.

Field Service for Mobile: Android 4.0

Field Service for Mobile Android 4.0 releases in the middle of July, 2018, not the end of June.

Enable Clickjack Protection for Visualforce Pages in the Salesforce Classic Console

Added more details about how to enable clickjack protection for Visualforce pages.

Einstein Prediction Builder: Enjoy Custom AI Without Code (Beta)

Added a release note for this beta feature and a related release note [Show Einstein Predictions Where You Want Them \(Beta\)](#).

New Lightning Navigation APIs for Lightning Components

Clarified which containers support new navigation APIs.

Make It Easy for Your External Users to Log In to Your Community with Passwordless Login

Added a security warning regarding using SMS verification codes with passwordless logins.

Use Pardot in French, German, and EU Spanish (Beta)

Added a release note for this beta feature.

Let Community Members Author Knowledge Articles

Clarified that community members can author articles with the API.

Compile on Deploy (Generally Available)

Corrected the location of the compile on deploy option: in Setup, under Apex Settings.

More Granular Batching for Scheduled Actions and Flow Interviews Help You Avoid Runtime Errors

Corrected the Apex governor limit from 100 SOQL queries per hour to 100 SOQL queries per transaction.

Resolve Issues with Scanned PDF Previews

This feature is now GA, so admins no longer need to contact Salesforce to enable.

Unique ID Field Added to Insecure External Assets Event Type

Added information on a new API field.

Changed Objects

Added that the PK Chunking Header for the Bulk API now supports the CaseHistory object.

Align Sales and Marketing on a Single Platform with Pardot for Lightning (Beta)

Added a release note for this beta feature.

Get More Filter Options in the Activity Timeline

Added that the activity timeline no longer includes the label Activity Timeline.

Salesforce CLI: Plug-In Development Support, Streamlined Packaging Commands, and Enhanced Debug Logging

Added information about new features, changed commands and parameters, and plug-in development for the Salesforce CLI v43 release.

Create and Manage Packages More Easily (Beta)

Added information about new and changed Salesforce CLI packaging commands.

Salesforce Extensions for VS Code: Two New Debuggers

Added release notes for Salesforce Extensions for Visual Studio Code's new feature: Apex Replay Debugger.

Find Files Fast with the Recent Files Dropdown

Clarified that the recent files dropdown is available only in Lightning Experience.

May 30, 2018

Quickly Trend Any Data in Salesforce with the Snapshot Analytics App

Released Snapshot Analytics app.

Get Hourly Event Logs to Improve Activity Visibility (Generally Available)

Clarified the hourly event log file process.

Locked Packages Pilot Is Suspended

After careful consideration, we have decided to suspend the pilot for locked packages and to stop supporting them in Summer '18.

Custom Buttons Used as Actions on Page Layouts Can No Longer Be Deleted

Added information on a change we made to prevent page layouts from becoming corrupted.

New URL Format for Lightning Experience and the Salesforce Mobile App

Added a note about the behavior of Visualforce URLs that use the `/apex/pageName` format.

Put Your Visualforce Email Templates to Work in Lightning Experience

Clarified that Visualforce email templates can't be used with cases.

Changed Objects

Added that the PK Chunking Header for the Bulk API now supports the Event and EventRelation objects.

Help and Training

Added the Help and Training section with new Trailhead modules, videos, and updated Trust and Compliance documents.

Improved Workflow for Percent of Total Order Products

Added a new minor addition to the Salesforce CPQ Orders Release Notes.

Community Case Deflection Dashboard Removed From Community Management Package

We removed the Community Case Dashboard from the Salesforce Community Management Package in the AppExchange.

Removed: Get Improved Security for CPQ Calculations

This feature isn't quite ready for showtime, so we're removing it for now while we make improvements. We'll let you know once it's back up.

slds-form_inline Style Removed

Added information about a CSS style that was removed because it was mistakenly used by some base Lightning components.

May 23, 2018

Override the New Event Button on the Calendar in Lightning Experience

Customize the New Event action so that it's most relevant to your business process, and let your teams take that action directly from the calendar.

Prebuilt Permission Sets Make It Easier to Set Up the Analytics Platform

Added note describing prebuilt Analytics permission sets.

Nonprofits: Now There's an Analytics App Just for You and Your Data

Released new Analytics Template for nonprofits.

New Change Set Components

Added the Snap-in Deployment component.

Manage Your AppExchange Profile and Preferences

Added a note announcing AppExchange profile enhancements.

Health Cloud Supports Russian, Italian, and Danish Languages

Added notice of enhanced language options.

Removed New `$Locale.dir` Attribute in Lightning Components

The new `$Locale.dir` attribute has been removed due to a regression.

Lightning Experience Stylesheets Support Custom Theming

Added a note about Lightning Experience theme support for Visualforce pages.

Tooling API New and Changed Objects

Added a previously undocumented field on the `PackagedInstallRequest` object: `EnableRss`.

Accelerate Data Loads as Needed

Added a release note about two custom setting fields that let admins disable rollup by lookup calculations to accelerate data loads.

May 16, 2018

Maximize Your Analytics Investment with Insights from the Adoption Analytics App

Released new Analytics templated app.

Removed announcement of a Salesforce Billing feature called Credit Center. It will be available in a later release.

Use New Components to Build Custom Email Application Panes

Clarified that the Email Tracking feature applies only to emails, not to events.

Permanently Delete Prospects

Honor customer requests to permanently delete prospect data.

Changes to How Pardot Treats Prospects in the Recycle Bin

Pardot has changed how prospects in the recycle bin are tracked and which activities can restore them.

Configure New Options for Salesforce Engage

We've added configuration options for Salesforce Engage.

Adoption Manager Emails Disabled

Salesforce Adoption Manager emails will no longer be sent to users.

Users Get Lightning Experience Only in Some New Orgs

Starting in June 2018, all new orgs for certain editions will be configured so that end users work exclusively in Lightning Experience.

Reports and Dashboards: Lightning Experience Report Builder (Generally Available), Lightning Joined Reports (Beta), Subscription Improvements

Added a link to a video demoing the release's top reports and dashboards features.

Changed Objects

Updated to note that the `NavigationMenuItem Status` field defaults to different states and has different query returns in API version 43 than in API versions 42 and earlier.

AppExchange: New Filters and Profile Enhancements

Added a note announcing new filters on the AppExchange website.

Submit Marketing Resources in the Publishing Console

Added a note announcing a Publishing Console enhancement that lets partners provide marketing resources to Salesforce.

Scratch Orgs: New Features Available

Fixed a typo for the scratch org feature `StateAndCountryPicklist`.

Customize Your Theme with Image Cropping and Color Overrides

Added a note announcing that the theme branding image can be used on the Lightning Experience loading screen.

Customize Dispatcher Console List Views with Custom Filters

Clarified which user permissions are needed to manage custom filters from the dispatcher console, and explained how to make a filter public.

Enhanced Dispatcher Console Experience

Corrected the steps to take to set the Gantt to load on today's date.

Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs

Added a note about support for quick actions created with the Custom Visualforce and Lightning Component action types.

May 9, 2018

Add Knowledge Articles to Work Types

Clarified how to attach knowledge articles to work types, work orders, and work order line items in Salesforce Classic, Lightning Experience, and the console.

Automate Rollup by Lookup Rule Recalculations Using Apex

Automate Rollup by Lookup summary recalculations for your org by using Apex jobs to run RBL rules.

Increase Productivity with Inbox Beta for Outlook (Beta)

Clarified that Inbox Beta for Outlook requires an Inbox license for Lightning for Outlook users, and a new add-in install for Salesforce Inbox users.

Evaluate Your App's Performance with Optimizer (Beta)

Discover ways to make your app's record pages perform better with a specialized version of Salesforce Optimizer.

Untangle Your Dependencies with MetadataComponentDependency Queries (Pilot)

Removed the list of the currently supported metadata component types to perform further validation.

Salesforce CPQ: Booking Reports, Faster Order Creation, and Enhanced Quote Line Editor Navigation

Added note that starting in Salesforce CPQ 214, both new and existing users are auto-upgraded to major CPQ patches and releases.

Organizer and Attendee Details No Longer Exported with Events

When reps export events from event detail pages, the organizer, attendee, and attendee status are no longer exported to the .ics file.

Scratch Orgs: New Features Available

These new features are now available when you create scratch orgs.

Salesforce CLI: Plug-In Development Support, Streamlined Packaging Commands, and Enhanced Debug Logging

We no longer support installing the Salesforce CLI on the Windows 10 Subsystem for Linux.

Evaluate Your Implementation with Salesforce Optimizer

Announcing version 2.3 of Salesforce Optimizer, along with previous enhancements in version 2.2.

May 2, 2018

Analytics Adoption AppExchange Package Lets You See How Your Team Uses Einstein Analytics

New AppExchange package that enables insights into Analytics asset usage.

You Asked for It!

Added Ideas that we delivered.

Log Emails to the Records That You Choose

Clarified that the Log Email option is always visible when reading or composing an email.

Keep List Email Under Lock and Key

Removed "Beta" from the title. Platform Encryption is generally available.

Tooling API New and Changed Objects

Added the object `EmbeddedServiceFieldService`. Added information about the `EmbeddedServiceConfig`, `EmbeddedServiceLiveAgent`, and `EmbeddedServiceQuickAction` objects.

Untangle Your Dependencies with MetadataComponentDependency Queries (Pilot)

Added a list of the currently supported metadata component types.

Get Snap-Ins Settings with Lightning Components

Added the ability to get agent and chatbot image URLs in addition to Live Agent IDs.

Get Search Results for More Objects

Added Case Comments to the list of searchable fields.

Shield Platform Encryption: Activities Data, Custom Object Name, Filter-Preserving Encryption, and More Key Management Options

Added release notes about new Summer '18 Shield Platform Encryption features and functionality.

April 23, 2018

Salesforce Summer '18 Release Notes

Published preview release notes.

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 in Salesforce Help, release notes, or developer guides, 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](https://twitter.com/salesforcedocs).

How and When Do Features Become Available?

Some features in Summer '18 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

We've made some changes to our supported browsers documentation, making it easier to find what you need. 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	✓			
Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11			✓	
Supported Browsers for Salesforce Classic	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers for Einstein Analytics	✓			

Salesforce Overall

Encourage users to discover and adopt Lightning Experience with automatic switching and feature prompts. Track Lightning Experience usage to better understand and optimize your adoption. See where you're going before you click with shorter and easier to read URLs. Personalize the navigation bar in Lightning Experience with fewer clicks. Make global search more specific with object-level searching, and use synonym groups without having to create them. Show what's most important to you in list views with more-detailed filters. Organize records with theme-based topics. Enhance your console app with guided flows, improved link sharing, and more Lightning Console JavaScript APIs. Get guidance on keeping individuals' personal data secure and private.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Guidance for Data Protection and Privacy Regulations	✓			
Lightning Experience Adoption: More Ways to Discover and Adopt the New Salesforce				
Encourage Users to Adopt Lightning Experience	✓			
Discover Why It's Better in Lightning Experience	✓			
Let the Readiness Report Be Your Guide to Lightning Experience		✓		
Get Insight into User Activities with the Lightning Usage App		✓		
Adoption Manager Emails Disabled	✓			
Users Get Lightning Experience Only in Some New Orgs		✓		
New Banner Encourages Admins to Transition to Lightning Experience		✓		
Roll Out the Welcome Mat for New Lightning Experience Users		✓		
Learn Why Users Are Switching Back to Salesforce Classic			✓	
New URL Format for Lightning Experience and the Salesforce Mobile App			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Evaluate Your Implementation with Salesforce Optimizer		✓		
Convert JavaScript Buttons to Lightning-Friendly Alternatives With the Lightning Experience Configuration Converter (GA)				
Whitelisted IP Addresses for the Lightning Experience Configuration Converter Have Changed		✓		
Search				
Search the Object You Want Easily from Anywhere	✓			
Save Time with Standard Synonym Groups	✓			
Filter Search Results for More Objects	✓			
Enhanced Support for Search				
Get Search Results for More Objects	✓			
Search Lemmatization Supports Hebrew	✓			
Federated Search Available in Performance Edition	✓			
Personalize the Navigation Bar in Less Time	✓			
Customize Your Theme with Image Cropping and Color Overrides		✓		
Streamline Your List Views with Detailed Filters	✓			
Make Inline Edits While Using Filter Logic	✓			
See Field Dependencies While Editing a Record Details Page	✓			
Organize Records with Topics			✓	
Console				
Guide Your Console Users with Flows			✓	
Automate Tab Refresh, Change Nav Items, and Listen for Utility Item Clicks		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
with New Lightning Console JavaScript APIs				
Copy and Share Your Workspace and Active Subtab from the Address Bar	✓			
Open Custom Lightning Components in Workspace Tabs and Subtabs		✓		
Pin Right and Left Sidebars in Your Console App			✓	
Salesforce Surveys: More Options for Gathering Refined Data				
Tailor Survey Questions Based on Participant Responses	✓			
Copy a Survey	✓			
View a Contact's Survey Invitations	✓			
Get More Detail with the Expanded Rating Question Scale	✓			
Easily Assign Cisco Spark and WebEx Permissions			✓	
Give Private Feedback Without Having to Opt In	✓			

Lightning Essentials

Are you ready to take your small business to new heights? With Salesforce Lightning Essentials, you can easily manage your business' sales and service needs in one place. Grow lightning fast and help customers succeed with Sales and Service Lightning Essentials.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Essentials				
Customize Salesforce with a New Setup App			✓	
Welcome Colleagues to Salesforce with Invite Teammates			✓	
Use Custom Sales Stages for Increased Productivity			✓	
Eliminate Duplicate Records			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Service Essentials				
Build Flows and Processes in Service Essentials			✔	
Get to Know Service Cloud Mobile with a New Walkthrough			✔	

Sales

Get smarter with Einstein Forecasting, now generally available. Control access to campaign members, and add them by account. Improve your reps' performance with Lightning Dialer features and other tools.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Cloud Einstein				
Einstein Forecasting			✔	
Einstein Opportunity Scoring			✔	
Einstein Lead Scoring				
Optimize Your Lead Scoring Model by Ignoring Irrelevant Fields			✔	
Get More Guidance When Setting Up Einstein Lead Scoring			✔	
Einstein Automated Contacts	✔			
Einstein Activity Capture	✔			
Einstein Insights	✔			
Other Changes in Sales Cloud Einstein				
View and Edit Analytics Apps with Sales Cloud Einstein			✔	
See Insights in Sandbox			✔	
Get Improved Opportunity Scores	✔			
Core Sales Features				
Campaigns				
Control Who Can Access Campaign Members			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Add All Contacts from an Account to Campaigns	✓			
Send List Emails to Campaign Members	✓			
Filter Lead and Contact List Views by Campaign	✓			
View Campaign Hierarchies Faster	✓			
View Pardot Marketing Asset Engagement in Salesforce (Beta)			✓	
Collaborative Forecasts				
Predict Sales More Accurately with Schedule and Product Date Forecasts in Lightning Experience			✓	
Show Product Family Totals in the Opportunity List			✓	
Leads				
Convert Leads with Contacts to Multiple Accounts and Other Conversion Enhancements			✓	
Control Who Can Merge Leads More Securely			✓	
Products				
Accounts				
Set Up Person Accounts in Lightning Experience		✓		
Take Advantage of Quick Action Improvements for Person Accounts	✓			
New Validation Process Prevents Issues After Uninstalling Packages		✓		
Path				
Guide Reps Toward Success with Path for Contacts			✓	
Update Dependent Picklists from Path			✓	
Contacts				
Productivity Features				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Dialer				
Coach Your Sales Reps with Call Monitoring (Generally Available)			✓	
Tailor Prerecorded Voicemail Messages for Different Types of Prospects	✓			
Show Local Numbers When Calling Prospects			✓	
Other Changes in Lightning Dialer	✓			
Einstein Activity Capture				
Give the Gift of Automatic Logging			✓	
Get Smarter About Email with Email Insights in the Activity Timeline			✓	
Access All Activity History in Einstein Activity Capture	✓			
Manage Data Policies			✓	
Activities				
Do More with Tasks from the List View	✓			
Create Copies of a Task for Colleagues	✓			
Create Predefined Subjects for Tasks and Events			✓	
Get More Filter Options in the Activity Timeline	✓			
Keep Activities Safe and Secure			✓	
Email Experience				
Send List Emails to Campaigns and Campaign Members	✓			
Filter by Campaign to Send Precise List Emails	✓			
Keep List Email Under Lock and Key			✓	
Skip the Clicks—Drag Your Email Attachments	✓			
New Location for Email Composer Buttons	✓			
Configure Email Relays for Each Domain			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Email Templates				
Restrict Use of Salesforce Classic HTML-Based Email Templates to Secure Browsers (Critical Update)		✓		
Manage Lightning Email Templates in One Place	✓			
Salesforce Classic Email Template Setup Has a New Name			✓	
Boost the Effectiveness of Email Templates with HTML	✓			
Unify Contact, Lead, and User Merge Fields in Email Templates with a New Merge Language		✓		
Put Your Visualforce Email Templates to Work in Lightning Experience	✓			
Kanban				
Calendar				
Update Calendar Items by Dragging Them in Lightning Experience	✓			
Enhance Your Calendar View in Lightning Experience	✓			
Override the New Event Button on the Calendar in Lightning Experience			✓	
Sales Console				
Inbox				
Predict Priorities with Einstein Email Insights			✓	
Give All Inbox Users Access to the Activities Dashboard			✓	
Grow Your Network with Recommended Connections			✓	
Data Quality				
Duplicate Management: Run Duplicate Jobs on Custom Objects			✓	
Lightning Data: Clearer Labels, Field Mapping Control, Reviewed Status, Currency Conversion				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Data Integration Labels Were Changed	✓			
Get More Control over the Field Mapping for Lightning Data Updates			✓	
Trust the Status of Records You've Reviewed	✓			
Get Converted Currency Values in Lightning Data Records			✓	
Specify Data Integration Rule Matches Using a Vendor's Unique ID	✓			
Support Key Decisions by Testing the Minimum Match Confidence Score in Lightning Data			✓	
See Remaining Lightning Data Credits Before Importing Accounts	✓			
Lightning for Gmail				
Focus on the Features You Need with Improved Design	✓			
Log Emails to the Records That You Choose	✓			
Microsoft® Integration				
Lightning for Outlook				
Focus on the Features You Need with Improved Design	✓			
Log Emails to the Records That You Choose	✓			
Increase Productivity with Inbox Beta for Outlook (Beta)			✓	
Use New Components to Build Custom Email Application Panes			✓	
Salesforce for Outlook				
Upgrade to Salesforce for Outlook v3.4.3	✓			
Salesforce for Outlook Not for Sale in Winter '19	✓			
Salesforce CPQ and Billing				
Salesforce CPQ				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Up Salesforce CPQ Summer '18				
Generate Accurate Revenue Reports with Bookings	✓			
Optimize Invoice and Revenue Workflows with Fewer Steps	✓			
Create Orders Faster with Fewer Price Schedules	✓			
Goodbye, Subscription Conversion and Full-Term Net Unit Price Fields	✓			
Quickly Navigate the Quote Line Editor	✓			
Other Changes in Salesforce CPQ	✓			
Salesforce Billing				
Use Revenue Agreements to Group Revenue Schedules	✓			
Pardot				
Permanently Delete Prospects		✓		
Changes to How Pardot Treats Prospects in the Recycle Bin	✓			
Align Sales and Marketing on a Single Platform with Pardot for Lightning (Beta)			✓	
Use Responsive Layouts for Landing Pages	✓			
Personalize Engage Emails with Salesforce Files			✓	
Configure New Options for Salesforce Engage		✓		
Match Leads to Accounts Without a Website Value	✓			
See Fewer False Positives for Leads Matched to Accounts	✓			
Let Prospects Repeat Engagement Programs (Beta)			✓	
Preview Emails as a Specific Prospect	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Have Some Fun with Emoji in Emails	✓			
Engagement Studio Offers Pointers				
Twitter Changes Posting Policy	✓			
Use Pardot in French, German, and EU Spanish (Beta)	✓			
Pardot Help Site Migration Is Complete	✓			
Other Changes in the Sales Cloud				
Filter Account List Views by Territory in Lightning Experience	✓			
Display Change for Event Subjects in Calendar	✓			
Organizer and Attendee Details No Longer Exported with Events	✓			

Service

Ease your team's workload by building Einstein Bots to deflect routine cases like password requests. Use Lightning Guided Engagement to guide your agents through multi-step actions, like call scripts, with an ordered list of flows right inside the console. You can even use Lightning Guided Engagement with Live Agent chats. Take advantage of robust field service features like Snap-ins Appointment Management (beta), full Lightning community support, and an optimization tool to handle schedule disruptions. Enjoy more choices in how to route work items to agents with Skills-Based Routing for Omni-Channel and External Routing for Omni-Channel. Use translation management features in Lightning Knowledge, including side-by-side comparisons, smart links for translated articles, and the Lightning Knowledge Migration Tool. Finally, manage cases more efficiently with case teams and email drafts.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Bots			✓	
Case Management				
Service Console				
Resolve Cases More Quickly with Flows and Case Teams in the Service Console			✓	
Bring Your Service Processes to the Console with Lightning Guided Engagement (Generally Available)			✓	
Cases				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Case Teams in Lightning Experience			✓	
Save the Day with Private Email Drafts for Cases			✓	
Set Default Email Field Values with Apex in Lightning Experience			✓	
Use Your Case Feed Publisher APIs in Lightning Experience			✓	
Perform Mass Quick Actions on More Objects			✓	
Enter Internal Comments When Closing a Case			✓	
Send Email Notifications for Case Changes			✓	
Respond to Emails Faster in the Case Feed	✓			
Attach Your Files to Emails with Drag and Drop	✓			
Share Links to Individual Case Feed Posts	✓			
Find Case Comments with Global Search	✓			
Omni-Channel				
Get the Right Work to the Right Agent with Skills-Based Routing (Generally Available)			✓	
Transfer Work Items to a Different Skill Set	✓			
View Work Routed by Skills in Omni-Channel Supervisor			✓	
Route Third-Party Work Items with External Routing (Generally Available)			✓	
See “New” Work and “My Work” in the Omni-Channel Utility	✓			
Set Up Omni-Channel in Lightning Experience	✓			
Macros and Quick Text				
Create Macros That Insert Text at Your Cursor	✓			
Change the Quick Text Owner to a Queue	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Entitlement Management				
Field Service				
Add Knowledge Articles to Work Types			✓	
Guide Your Team with Path for Field Service			✓	
Automate Work Order Generation for Maintenance Plans			✓	
View Related Maintenance Plans on Accounts, Contacts, and Locations			✓	
Encrypt Data at Rest with Shield for Work Orders and Service Appointments			✓	
Create Criteria-Based Sharing Rules for Field Service			✓	
Filter Related Lists on Service Reports (Generally Available)			✓	
Manage Field Service in Lightning Communities			✓	
Create Larger Service Territory Hierarchies	✓			
Edit the Currency Code on Time Sheets			✓	
Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments (Beta)			✓	
Field Service Managed Package: Resource Schedule Optimization, Gantt Live Updates, and Custom List Filters				
Optimize the Day, One Resource at a Time			✓	
Improve Dispatcher Experience with Live Gantt Updates (Beta)			✓	
Customize Dispatcher Console List Views with Custom Filters			✓	
Factor in Secondary Territory Member's Operating Hours			✓	
Enhanced Dispatcher Console Experience			✓	
Streamline Dispatcher Console Tasks			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Support Community Appointment Management (Beta)			✓	
Other Enhancements in the Field Service Lightning Managed Package			✓	
Field Service for Mobile: Android 4.0				
Connect Flows as Quick Actions			✓	
Use Lightning Actions in the Field Service App (Android and iOS)			✓	
Create Custom List Views for the Schedule Screen			✓	
Make the Right Choice with Dependent Picklists			✓	
Illustrate Your Point with Images in Knowledge Articles			✓	
Consume Products from Multiple Locations (Beta)			✓	
Maximize Screen Space by Customizing Resource Absences			✓	
Save Time with the Barcode Scanner			✓	
Capture Multiple Signatures on Service Reports			✓	
Restrict Creating or Updating Products Consumed by Default			✓	
See Available Time Slots by Month			✓	
Support Multiday Appointments			✓	
Create a Product Request			✓	
Other Enhancements to Service Reports			✓	
Online Documentation Parity			✓	
Channels				
Live Agent				
Resolve Cases with Chat and Lightning Guided Engagement			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Catch Your Agent's Eye with Incoming Message Notifications in Live Agent	✓			
Preview File Attachments in Live Agent in Lightning Experience	✓			
Customize the Live Chat Visitor Page in Lightning Experience		✓		
Set Up Live Agent in Lightning Experience with a Guided Setup Flow	✓			
Snap-Ins Chat				
Collect Cases When Your Chat Agents Are Off the Clock			✓	
Customize the Minimized Snap-In with Lightning Components			✓	
Get Snap-Ins Settings with Lightning Components			✓	
Set a Routing Order to Fine-Tune How Chats Are Assigned to an Agent			✓	
Display a Customer's Place in Line Before the Chat Starts			✓	
Make Your Own Custom Events for Chats			✓	
Update to the Version 5.0 Code Snippet to Get the Latest Features		✓		
Get a Quick Start to Snap-Ins Chat with the Live Agent Setup Flow		✓		
Preview Files Sent During a Chat	✓			
Snap-ins for Mobile Apps				
			✓	
CTI				
			✓	
Knowledge				
Submit for Translation in Lightning Experience	✓			
Compare Translations and Master Articles Side by Side	✓			
Use Authoring Actions with Translations	✓			
Insert Smart Links into Rich Text Fields	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Switch Languages on the Fly with the Translation Switcher Component	✓			
Hover Text on Articles in Lightning Knowledge Search Results	✓			
Add Lightning Knowledge to Service Essentials		✓		
Move to Lightning Knowledge with the Lightning Knowledge Migration Tool (Beta)		✓		
Service Cloud Mobile	✓			
Other Changes				
Service Setup Gets a New Look		✓		

Analytics

On the Reports and Dashboards side, this release brings the Lightning Experience report builder, now generally available, Lightning Experience joined reports (beta), enhanced subscriptions, and much more. For Einstein Analytics, Einstein Discovery recommendations in Salesforce objects is now generally available, conditional formatting in dashboards is here, as well as many other new features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Reports				
Reimagine Reporting with Lightning Report Builder (Generally Available)			✓	
Joined Reports Arrive in Lightning Experience (Beta)			✓	
Export Reports, Keep the Formatting			✓	
Group Reports by Customized Date Granularity			✓	
Filter Field History Reports by Old and New Values	✓			
Get Improved Performance with Enhanced Run Page (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Chart Enhancements for Reports in Lightning Experience	✓			
Other Enhancements to Reports in Lightning Experience			✓	
Dashboards				
Link from Dashboard Components to Websites or Salesforce Records	✓			
Add a Report to a Dashboard from the Report	✓			
Use Source Report Charts in Dashboard Components	✓			
Group and Measure Data in Lightning Tables	✓			
Chart Enhancements for Dashboards in Lightning Experience	✓			
Other Enhancements to Dashboards in Lightning Experience	✓			
Folders				
Enhance your Report and Dashboard View in Lightning Experience	✓			
Organizing your Report and Dashboard Folders in Lightning Experience	✓			
Subscription				
Add Dashboard Subscriptions for Others in Lightning Experience	✓			
Einstein Analytics				
New Einstein Analytics Products				
Onboarding, Personalization, and Collaboration				
Prebuilt Permission Sets Make It Easier to Set Up the Analytics Platform			✓	
Learn More from Help Menus and the Analytics Adventure App	✓			
Go Directly from Notification to Dashboard View	✓			
Share Dashboard Views Using Annotations	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
App Building				
Expand Your Exploration Vocabulary with Improvements to Conversational Queries (Beta)			✓	
Locate Charts More Easily	✓			
Customize Compare Table Column Aliases	✓			
Automatically Highlight Data with Conditional Formatting	✓			
Break Up Monolithic Dashboards to Improve Performance (Generally Available)	✓			
Zoom In on Maps to Focus on Regions			✓	
Add Date Filters More Quickly	✓			
Change the Labels and Colors of Dataset Dimension Values	✓			
Choose the Default Dataset Fields That Appear in a Table	✓			
Keep Your Assets in Order with Synced App Navigation	✓			
Get Familiar with JSON Changes for Dashboard Designer		✓		
Updates to the REST API		✓		
Test Analytics Template Rules Files		✓		
Other Enhancements to Analytics Charts and Dashboards	✓			
Data Integration				
Connect to More Data with New Connectors and Revised Limits		✓		
Schedule Replication by Connection		✓		
Changes to Who Can Create Remote Connections		✓		
Upload More External Data Files		✓		
Create and Run More Dataflows, and Track Usage with the Flow Indicator		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Data out of Shape? Dataflow Append Doesn't Mind		✓		
Append Rows in Dataset Recipes		✓		
Use Multi-Select Fields for Faster Formulas in Recipes		✓		
Inherit More of Your Salesforce Sharing Settings in Einstein Analytics			✓	
Prebuilt Templates and Apps				
Take the Fast Path to Business Intelligence with New Templates	✓			
Health Cloud Analytics Template Lets Health Cloud Customers Get Started with Einstein Analytics—Fast	✓			
The Social Case Analytics Template Brings the Power of Analytics to Your Social Customer Service Data		✓		
Bring Your Financial Services Cloud Data to Life With the Financial Advisor Analytics Template.		✓		
The Campaign Analytics Template Brings the Power of Einstein Analytics to Marketing Campaign Data		✓		
Analyze Field History Data in any Salesforce Object with the Change Analytics Template		✓		
Get Instant Insights About Your Team's Quoting Process with the Quoting Analytics Template		✓		
Quickly Trend Any Data in Salesforce with the Snapshot Analytics App	✓			
Maximize Your Analytics Investment with Insights from the Adoption Analytics App	✓			
Nonprofits: Now There's an Analytics App Just for You and Your Data	✓			
Analytics Adoption AppExchange Package Lets You See How Your Team Uses Einstein Analytics	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify and Track Top Accounts in B2B Marketing Analytics	✓			
Mobile Apps				
Experience Your Favorite Charts and Tables on Einstein Analytics for iOS and Android	✓			
Additional Enhancements in Einstein Analytics for iOS	✓			
Additional Enhancements in Einstein Analytics for Android	✓			
Display Einstein Discovery Recommendations on a Salesforce Object (Generally Available)			✓	

Communities

The Community Cloud makes waves this summer with fabulous new features. We're excited to introduce ready-made themes in Community Builder, so you can change the look and feel of your community with a few clicks. We also expanded support for sharing sets, now available to Customer Community Plus and Partner Community users. Add some exciting new features on feeds, such as pinning posts and closing threads. Who needs a summer vacation when there's so much fun in your community?

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Community Builder				
Update Your Lightning Community to the Latest Template			✓	
Customer Service (Napili) Has a New Name		✓		
Update Your Community Look and Feel Quickly by Changing Themes		✓		
Improve Your Customer's Community Experience with Progressive Rendering			✓	
Build and Distribute Business Solutions Using Lightning Bolt Solutions (available within 24 hours after the release)			✓	
Delete Audiences		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Navigation and Tile Menu Changes as Draft		✓		
Display CMS Content in Your Community Using CMS Connect JSON (Generally Available)		✓		
Configure Named Credentials for CMS Connect JSON (Generally Available)		✓		
Get Better SEO for Better Content Discovery		✓		
Update Your <h1> Tag Overrides to <h3> for Topic Detail and Search Results Article Titles		✓		
Update Your <ui:button> Overrides for Some Lightning Community Components			✓	
Community Builder Components				
Access Field Service Data in Lightning Communities			✓	
Recommend Actions and Offers to Community Members (Pilot)				✓
Let Users View and Resume Paused Flows		✓		
Use Activity Timeline in Communities		✓		
Get More Flexibility with Calendars in Communities	✓			
Language Picker Renamed and Other Improvements			✓	
Allow Community Users to Create Cases with the Contact Support Button		✓		
Easily Choose Topics, Customize the Upload Files Button Label, and More in the Case Deflection and Contact Support Form Components		✓		
Track Customer Concerns by Monitoring the Contact Support Subject Line		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Let Customers Book Appointments from Your Community (Beta)			✓	
Do More with the Snap-Ins Chat Component		✓		
Hide the Connected Sources Tab on User Settings		✓		
Dependent Picklist to be Updated in Winter '19			✓	
Security				
Optimize Account Roles to Improve Performance and Scale Your Org (Generally Available)			✓	
Make It Easy for Your Community Users to Log In with Identity Verification Methods Instead of Passwords			✓	
Expire Community Links in Welcome Emails		✓		
Administrator-Initiated Password Reset Links Expire After 24 Hours (not immediately available)		✓		
Keep Links in Forgot Password Emails from Expiring Prematurely		✓		
Enable Users to Review and Manage Their Verification Methods		✓		
Trailing Slash Removed from an ID Token's Issuer URL		✓		
Authentication Provider Endpoints Require HTTP or HTTPS		✓		
Configure the Validity Period and Audiences for ID Tokens (not immediately available)		✓		
Set Different Login Policies for Salesforce and Community Users (Beta)		✓		
Renamed Option for Verifying Community External Users' Identity		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Make Sure That Your Head Markup Is Valid		✓		
Sharing: Sharing Set Support for More Licenses (Beta), Improved Case Access (Beta)				
Use Sharing Sets with All Customer and Partner Licenses (Beta)			✓	
Use Sharing Sets with Contacts with Multiple Accounts (Pilot)	✓			
Restrict Community Users' Access to Cases (Beta)		✓		
Community Engagement				
Celebrate Community Members with Recognition Badges (Beta)			✓	
Use Marketing Journeys to Reward Member Question-and-Answer Activity			✓	
Use Posts at Scale to Reach Multiple Members at Once		✓		
Enjoy the Look of Updated Engagement Queue Pages		✓		
Chatter in Lightning Communities				
Close a Conversation in Communities			✓	
Pin Posts to Feeds (Generally Available)			✓	
Check Community Streams Without Leaving Salesforce (Generally Available)			✓	
Hide an Article's Topics		✓		
Message Button Now Shown on Mobile Profiles	✓			
View Rich Publisher App Information in Emails	✓			
Get Email Notifications for Upvotes	✓			
Partner Communities				
Empower External Delegated Admins to Manage Their Teams (Beta)		✓		
Let Delegated Admins Manage and Share Branding Assets (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Give More Details with Campaign Marketplace (Generally Available)		✓		
Do More with Market Development Funds			✓	
Target Audiences Based on Their Channel Program or Level			✓	
Share Data with Channel Managers and Partner Users More Securely	✓			
Files in Communities				
Manage Libraries			✓	
Manage Library Membership (Generally Available)			✓	
Customize the Look of Libraries in Communities			✓	
File Detail Pages Enhance Community Files			✓	
Preview Quip Documents and Sheets in Communities			✓	
Additional Changes in Communities				
Let Community Members Author Knowledge Articles			✓	
Customize Lockout Email Templates			✓	
Assess a Customer's Mood on Support Calls with Community 360 (Pilot)		✓		
See Activity on More Objects and Add Record Filters in Community 360		✓		
Community Case Deflection Dashboard Removed From Community Management Package		✓		
Edit Self-Service User Permission Is Manage Customer Users		✓		
Secure Topics for Salesforce Sites and Portals (Critical Update)			✓	

Chatter

Your users can now see earned Trailhead badges on their profile pages. You can link to any type of record that is available in your org from a post or comment. Pinned posts and cross-community streams are now generally available.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
User Profiles and Feeds				
Show Your Trailhead Badges in Your Profile	✔			
Link to Your Most Relevant Records from a Post or Comment				✔
Pin Posts to Feeds (Generally Available)			✔	
Check Community Streams Without Switching Context (Generally Available)	✔			
Other Changes in Chatter				
Empty-State Messages Are Less Empty	✔			
Salesforce Classic Chatter Splash Screen Is Retired	✔			
Chatter Desktop Is Being Retired in Summer '18	✔			

Files

A smoother files workflow is here. Manage libraries right from Lightning Experience, including the power to update membership and delete empty libraries. Pop the Quip Lightning component onto records to let your users access Quip right from the record. Curate your files with topics, and find recently viewed files in a jiffy in the recent files dropdown.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Libraries in New Ways			✔	
Manage Library Membership from Files Home (Generally Available)			✔	
Find Files Fast with the Recent Files Dropdown	✔			
Manage Files Topics from the File Detail Page			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enjoy Updated File Previews in Salesforce Classic	✓			
Resolve Issues with Scanned PDF Previews				✓
Access Quip Files	✓			
Preview Quip Documents and Sheets			✓	
Other Changes in Files				
Keep All Attached Files When Merging Records	✓			
Include File Links in Weekly Data Export		✓		
Prepare to Bid Farewell to Flash	✓			
Files Connect for SharePoint On-Premises Is Being Retired	✓			
Files Sync Is Being Retired	✓			

Mobile

The Salesforce mobile apps help your users stay productive on the go. We added Chatter enhancements, email notifications for cases, and subjects for tasks and events, just to name a few.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce App				
What's New in Salesforce for Android and iOS	✓			
Everything That's New in the Salesforce App				
Updated Salesforce App Requirements	✓			
Share Posts, Polls, and Questions on Mobile	✓			
Get Rich Text in Your Mobile View of Community Feeds (Generally Available)	✓			
One Mention Is Enough	✓			
Keep Users in the Loop with Richer Full Content Push Notifications (not immediately available)	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Updated Apple Push Notification Service for iOS Notifications	✓			
Salesforce Authenticator				
Intelligently Save Trusted Locations with Einstein	✓			
Remove Trusted Locations with a New Method	✓			

Financial Services Cloud

View consolidated, customizable client profiles with person accounts—now certified for use on Salesforce mobile, Advisor Analytics, and partner and customer communities. Show key customer relationships with enhanced group relationship views. Enhanced rollups let users quickly take action and win opportunities from the Primary Group view. Accelerate data loads by disabling rollup-by-lookup calculations. Boost advisor and banker productivity in Financial Services Cloud with Salesforce Inbox and Pardot. And there's lots more, including a Teller Access permission set and usability and accessibility enhancements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Streamline the User Experience with Person Accounts			✓	
Customize Group Relationship Views			✓	
Roll Up Opportunities to the Primary Group			✓	
Accelerate Data Loads as Needed			✓	
Automate Rollup by Lookup Rule Recalculations Using Apex			✓	
Enhance Productivity with Salesforce Inbox			✓	
Get Smarter Marketing Automation with Salesforce Pardot			✓	
Get Tellers Up and Running with the Teller Access Permission Set			✓	
Associate an Activity to Multiple Contacts			✓	
Enhanced Accessibility	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Permission Set License Required for All Financial Services Cloud Users			✓	

Health Cloud

Health Cloud now supports Field Service Lightning, and you can choose from a variety of out-of-the-box ways to send and receive electronic health records (EHR) data using the HL7 v2 standard.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Work with Electronic Health Records in HL7 V2.x			✓	
Put Health Cloud to Work on Mobile Devices			✓	
New API Speaks Business Language			✓	
More Flexible Views of Patient Information			✓	
Permission Set License Required for All Health Cloud Users			✓	
Health Cloud Supports Russian, Italian, and Danish Languages				✓
Usability Enhancements	✓			
New and Changed Health Cloud Lightning Components			✓	
Health Cloud Metadata: New Types		✓		

Customization

Customize your way to a smarter org with the new Einstein Next Best Action pilot. We've taken several features from pilot or beta to generally available: External Services, custom time fields, Lightning components as flow actions, and flow stages. If you frequently use Lightning pages, processes, or flows, enjoy improved error handling.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Prediction Builder: Enjoy Custom AI Without Code (Beta)				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Next Best Action: Use Strategies to Recommend Actions and Offers (Pilot)				✓
External Services				
Create an External Service (Generally Available)		✓		
Enjoy an Improved External Services User Interface		✓		
Edit an External Service		✓		
Get More Characters with the External Services Schema		✓		
Handle More Response Codes in External Services Flows		✓		
Data Protection and Privacy				
Determine Which Data Privacy Record to Retain when Merging Records			✓	
The Individual Object Supports Standard Object Features	✓			
Make Users' Personal Data Unusable by Salesforce at Their Request			✓	
Lightning Flow				
Design				
Build Flows in Essentials and Professional Editions		✓		
Perform Local Actions in Flows by Using Lightning Components (Generally Available)		✓		
Track Progress Through a Flow with Stages (Generally Available)		✓		
Update Active Stages and Collections with New Assignment Operators		✓		
Capture Date/Time Values in Flow Screens		✓		
See Only Supported Options in the Process Builder Field Picker		✓		
Flow Distribution				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Launch Flows as Subtabs in Lightning Console Apps (Generally Available)		✓		
Use Strategies to Recommend Flows to Users and Community Members (Pilot)				✓
Debugging				
Debug Your Flows in Cloud Flow Designer		✓		
Process and Flow Error Emails: Generally Available with Org IDs and Recipient Control		✓		
Monitor Process and Flow Usage Against Per-Transaction Governor Limits		✓		
Make Sure That Flow and Process Bulk Operations Are Supported		✓		
Runtime				
Demystified Process Errors for Your Users	✓			
More Granular Batching for Scheduled Actions and Flow Interviews Help You Avoid Runtime Errors		✓		
Enable Flow and Process Queries to Execute in Batches (Critical Update)			✓	
Enable Partial Save for Create and Update Operations in Processes (Critical Update)			✓	
Flow Interviews End When User Sessions End	✓			
Lightning App Builder				
Broken Components No Longer Break Lightning Pages		✓		
Add Pinned Regions to Your Console Sidebars			✓	
Show Earned Trailhead Badges with the Badges Lightning Component		✓		
New Components for Email Application Panes			✓	
Recommend Actions and Offers to Lightning Users (Pilot)				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver a CSRF-Protected Visualforce Page with a Lightning Component		✓		
Fields				
Track Time with the Time Field Type (Generally Available)		✓		
Show Einstein Predictions Where You Want Them (Beta)				✓
Salesforce Connect				
Pass More Context Information to External Systems with Custom HTTP Headers		✓		
Use Triggers to Track Data Changes on External Objects with the OData 4.0 Adapter (Beta)				✓
Related Updates for Developers		✓		
General Setup				
Create Business Solutions with Lightning Bolt Solutions (available within 24 hours after the release)			✓	
Override the Sender for Approval Request Email Notifications		✓		
Use a Formula to Set a Predefined Value for a Picklist Field on an Action		✓		
Data Loader 43.0 Keeps Your Data More Secure	✓			
Show Translated Custom Quick Action Success Messages Using the Translation Workbench		✓		
View Object Details for Standard Permission Sets		✓		
Evaluate Your App's Performance with Optimizer (Beta)		✓		
Updated Currency Codes		✓		
Peruvian Currency Format Updated		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Retrieve Custom Setting List Views Using the Metadata API		✓		
Custom Buttons Used as Actions on Page Layouts Can No Longer Be Deleted		✓		
AppExchange				
Find AppExchange Solutions Faster with New Filters	✓			
Manage Your AppExchange Profile and Preferences	✓			

Security and Identity

You can now control how long ID tokens and verification links are valid and let your customers log in using verification codes. Encrypt more fields, filter encrypted data, and take more control over your key material. Assess your Health Check score at a glance with a grade. Rename your subdomain without contacting Salesforce Customer Support.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Authentication and Identity				
Make It Easy for Your External Users to Log In to Your Community with Passwordless Login			✓	
Implement Passwordless Login and Verification Methods with Apex		✓		
Give Users Flexibility When Entering Phone Numbers		✓		
Enable Users to Review and Manage Their Verification Methods			✓	
Set Different Login Policies for Salesforce and Community Users (Beta)		✓		
Track Logins for Internal Community Users			✓	
Set the Validity Period and Audiences for ID Tokens (not immediately available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Subject Claim Added to Asset Token for OAuth 2.0 Asset Token Flow		✓		
Set When Links Expire in Welcome Emails		✓		
Keep Links in Forgot Password Emails from Expiring Prematurely		✓		
Administrator-Initiated Password Reset Links Expire After 24 Hours (not immediately available)		✓		
Trailing Slash Removed from an ID Token's Issuer URL		✓		
Authentication Provider Endpoints Require HTTP or HTTPS		✓		
Register Callback URLs for OAuth 1.x		✓		
Trigger Custom Application Logic When Users Log Out (Beta)				✓
Create Lightweight Contactless External Identity Users (Beta)		✓		
Boost Customer Engagement by Extending Community Sessions for External Identity Users (Beta)			✓	
Renamed Option for Verifying Community External Users' Identity		✓		
View and Revoke Devices with Device Management (Beta)				✓
Salesforce Shield				
Shield Platform Encryption: Activities Data, Custom Object Name, Filter-Preserving Encryption, and More Key Management Options				
Encrypt Your List Emails			✓	
Encrypt Fields on Work Orders and Service Appointments			✓	
Encrypt Fields for Your Activities (Generally Available)			✓	
Encrypt Custom Object Names (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Encrypt Your Email to Case Feed and Email Messages (Beta)			✓	
Encrypt Data in Rich Text Area Fields (Pilot)			✓	
Get Exact, Case-Sensitive Matching with Shield Filter-Preserving Encryption (Generally Available)			✓	
Enable Encryption for Einstein Analytics Data (Generally Available)			✓	
Reference Encrypted Fields in Matching Rules Used in Duplicate Management (Beta)			✓	
Use Shield Platform Encryption with Change Data Capture (Pilot)			✓	
Require High-Assurance Sessions for Key Management Tasks (Generally Available)			✓	
Opt Out of Key Derivation with BYOK (Generally Available)			✓	
Event Monitoring: Hourly Event Logs, Continuation Callout Summary Event Type, and More Data in Lightning Event Types				
Get Hourly Event Logs to Improve Activity Visibility (Generally Available)		✓		
Measure Performance of Asynchronous Callouts in Event Log Files		✓		
Track External Object Data Callouts with Event Log Files (Generally Available)		✓		
Track User Actions in Lightning Experience More Comprehensively with New Fields		✓		
Query Field Retired in API Event Type		✓		
Unique ID Field Added to Insecure External Assets Event Type		✓		
Friendlier Login Timeout Experience for Users		✓		
Updated Resource Options for Transaction Security Entity Event Type		✓		
New Name for Event Monitoring Analytics App Setup		✓		
Health Check				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assess Your Security with Health Check Grades		<input checked="" type="checkbox"/>		
Health Check Has New and Changed Security Settings		<input checked="" type="checkbox"/>		
Other Changes				
Rename Your My Domain When You Want				
Stabilize the Hostname for My Domain URLs in Sandboxes (Critical Update)				
Specify External Hostname Values in Salesforce		<input checked="" type="checkbox"/>		

Salesforce IoT

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. This release includes a new Tracker feature to help you troubleshoot issues with new orchestrations. It also includes an Activity Log for monitoring live orchestrations to make sure that everything is working right.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Troubleshoot Orchestrations with Trackers Before You Activate in Production			<input checked="" type="checkbox"/>	
Monitor Orchestrations for Continued Performance with Activity Log			<input checked="" type="checkbox"/>	

Development

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Postponed "Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing" Critical Update			✓	
Enable Debug Mode for Only the Users Who Need It			✓	
New Lightning Navigation APIs for Lightning Components		✓		
Lightning Component Library Is Generally Available	✓			
Component CSS Class Names Updated			✓	
slds-form_inline Style Removed			✓	
Lightning Container Components Have New Security Enhancements		✓		
Changes in Locker Service		✓		
Returning Blobs from the Server No Longer Causes Generic Errors		✓		
New and Changed Lightning Components		✓		
New and Changed Lightning Events		✓		
New and Changed Lightning Interfaces		✓		
Deprecated JavaScript API Methods		✓		
Einstein Platform Services				
Get Twice as Many Free Predictions		✓		
Reset Your Einstein Platform Services Private Key		✓		
Use a Refresh Token to Generate an Access Token		✓		
Einstein Vision: Deleting Image Datasets and Image Models				
Deleting an Image Dataset Returns a New Status Code and Response		✓		
Explicitly Delete an Image Model to Remove It		✓		
Get the Status of an Image Dataset or Model Deletion		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Language: Deleting Text Datasets and Text Models				
Deleting a Text Dataset Returns a New Status Code and Response		✓		
Explicitly Delete a Text Model to Remove It		✓		
Get the Status of a Text Dataset or Model Deletion		✓		
Visualforce				
Apply Lightning Experience Stylesheets to Visualforce Pages (Generally Available)		✓		
Lightning Experience Stylesheets Are Updated		✓		
Lightning Experience Stylesheets Support Custom Theming		✓		
Quickly Identify the Salesforce Theme That Users See in JavaScript		✓		
Enable Clickjack Protection for Visualforce Pages in the Salesforce Classic Console		✓		
Apex				
Simplify Your Code with the Apex Switch Statement		✓		
Get the Developer Name for Record Types More Easily		✓		
The SOQL Count() Function Doesn't Count (As Much) Toward Limits		✓		
Clear Messages on Visualforce Pages While Testing		✓		
Compile on Deploy (Generally Available)		✓		
Opt Out of Collecting Code Coverage Information During Test Runs		✓		
Use the New Apex Access Modifier for Packaging (Beta)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Apex Code Size Limit Increased (available within 24 hours after the release)		✓		
Apex Exception Email Recipients Can Receive Process and Flow Error Emails			✓	
Apex: New and Changed Classes, Enums, and Interfaces				
New Apex Classes		✓		
Changed Apex Classes		✓		
New Apex Enums		✓		
Changed Apex Interface		✓		
ConnectApi (Chatter in Apex): New and Changed Classes and Enums				
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		✓		
Metadata				
Determine Metadata Coverage at a Glance		✓		
Enable Access to Metadata Without Enabling Access to Data, Too (Beta)				
Untangle Your Dependencies with MetadataComponentDependency Queries (Pilot)				✓
Custom Metadata Types				
Update Multiple Validation Rules with Custom Metadata Type Records (Generally Available)		✓		
Retrieve Custom Metadata Type List Views Using Metadata API		✓		
New Change Set Components		✓		
When Change Sets Become Unavailable		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Metadata API		✓		
Tooling API				
Tooling API New and Changed Objects		✓		
Tooling API Changed Calls and Resources		✓		
API				
New and Changed Objects				
New Objects		✓		
Changed Objects		✓		
SOQL		✓		
SOSL		✓		
REST API				
New and Changed Resources		✓		
SOAP API				
New, Changed, and Deprecated Calls		✓		
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				
New Resource: folders/<folderid>/children		✓		
New Methods: GET folders		✓		
Changed Resources: /analytics/reports, /analytics/dashboards, and folders		✓		
User Interface API				
Build UI for List Views		✓		
Build UI for Most Recently Used List Views		✓		
Build UI for Apps		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Other User Interface API Changes		✓		
Bulk API		✓		
Publisher and Quick Action JavaScript APIs			✓	
Salesforce Console API		✓	✓	
\$CustomMetadata Global Variable		✓		
Debugging				
Banish Bugs with Two New Debuggers in Visual Studio Code (not immediately available)			✓	
Parse Debug Logs More Effectively with Updated Log Lines		✓		
Store Larger Debug Logs with Changed Log Limits		✓		
Troubleshoot Flows and Processes with New Log Lines		✓		
Salesforce Extensions for VS Code				
Debug All Your Orgs for Free with Apex Replay Debugger (Beta) (not immediately available)			✓	
Debug Subscriber Sandboxes in VS Code (not immediately available)			✓	
Force.com IDE 2 Beta Discontinued			✓	
Salesforce CLI (not immediately available)		✓		
Scratch Orgs		✓		
Work with Health Cloud Managed Packages in Scratch Orgs		✓		
Enterprise Messaging				
Test Process and Flow Event Subscribers in Apex		✓		
Deliver Test Events on Demand		✓		
Access Subscriber Information in an Apex Test		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Notified When an Apex Trigger Is Suspended for Too Many Retries		✓		
Get the Number of Milliseconds in Platform Event DateTime Fields		✓		
Scale Your Event-Based Apps with High-Volume Platform Events (Pilot)				✓
Keep Your External Data Up to Date with Change Data Capture (Pilot)				✓
Packaging				
Create and Manage Packages More Easily (Beta)		✓		
Remove Components from Non-Namespaced Unlocked Packages (Beta)		✓		
Enhanced Validation Prevents Removing Active Records when Uninstalling Packages		✓		
Locked Packages Pilot Is Suspended		✓		
ISVforce				
Launch Business Solutions Quickly Using Lightning Bolt Solutions (available within 24 hours after the release)			✓	
Submit Marketing Resources in the Publishing Console		✓		

Supported Browsers

We've made some changes to our supported browsers documentation, making it easier to find what you need. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

Where: Available in all editions.

IN THIS SECTION:

[Supported Browsers for Lightning Experience](#)

See the supported browsers and limitations for Lightning Experience.

[Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11](#)

We previously communicated that the end of support date for Internet Explorer version 11 (IE11) for Lightning Experience was December 16, 2017. We received your feedback, and as a result are offering Extended Support for IE11. This extended support is available through December 31, 2020.

[Supported Browsers for Salesforce Classic](#)

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

[Supported Browsers for Einstein Analytics](#)

The supported browsers for Einstein Analytics are Microsoft® Edge, Microsoft Internet Explorer® 11, and the most recent stable versions of Mozilla® Firefox® and Google Chrome™. Analytics isn't supported on Apple® Safari®.

Supported Browsers for Lightning Experience

See the supported browsers and limitations for Lightning Experience.

Where: Lightning Experience is available in the Group, Professional, Enterprise, Performance, Developer, and Unlimited editions.

Note:


- Salesforce doesn't support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic, Lightning Experience, or Salesforce mobile web. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce, see [Requirements for the Salesforce App](#).

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

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience and Communities until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- It is strongly recommended that you do not use Internet Explorer 11 with Community Builder.
- This change doesn't impact Salesforce Classic.

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Console Apps	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Communities	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Special setup considerations?	No	No	No	No	No
Limitations?	Yes	Yes	No	Yes	Yes

 **Note:** The term “latest version” is defined by the browser vendors. Use the support for your browser(s) to understand what “latest version” means.

Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer Version 11

We previously communicated that the end of support date for Internet Explorer version 11 (IE11) for Lightning Experience was December 16, 2017. We received your feedback, and as a result are offering Extended Support for IE11. This extended support is available through December 31, 2020.

Where: Lightning Experience is available in the Group, Professional, Enterprise, Performance, Developer, and Unlimited editions.

We believe that this extended period will give you the time you need to migrate from IE11 to more modern and secure browsers, while still allowing you to take advantage of the benefits of Lightning Experience now.

For complete details of Extended Support for IE11, including what’s covered and what isn’t, and steps you need to take, see [Retirement of Support for Accessing Lightning Experience Using Microsoft Internet Explorer version 11](#).

Supported Browsers for Salesforce Classic

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

Where: Salesforce Classic is available in all editions.

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

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 9+	Latest	Latest	Latest	11.x+
Salesforce Console	IE 9+	Latest	Latest	Latest	No
Special setup considerations?	Yes	No	No	Yes	No
Limitations?	Yes	Yes	No	No	Yes

 **Note:**

- The term “latest version” is defined by the browser vendors. Use the support for your browser(s) to understand what “latest version” means.
- Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

Supported Browsers for Einstein Analytics

The supported browsers for Einstein Analytics are Microsoft® Edge, Microsoft Internet Explorer® 11, and the most recent stable versions of Mozilla® Firefox® and Google Chrome™. Analytics isn't supported on Apple® Safari®.

Salesforce Overall: Improved Productivity in Lightning Experience with More Ways to Discover, Adopt, and Personalize

Encourage users to discover and adopt Lightning Experience with automatic switching and feature prompts. Track Lightning Experience usage to better understand and optimize your adoption. See where you're going before you click with shorter and easier to read URLs. Personalize the navigation bar in Lightning Experience with fewer clicks. Make global search more specific with object-level searching, and use synonym groups without having to create them. Show what's most important to you in list views with more-detailed filters. Organize records with theme-based topics. Enhance your console app with guided flows, improved link sharing, and more Lightning Console JavaScript APIs. Get guidance on keeping individuals' personal data secure and private.

IN THIS SECTION:

[Get Guidance for Data Protection and Privacy Regulations](#)

Work your way toward complying with data protection and privacy regulations. Regardless of the regulations and policies with which you're complying, we give you guidance to help you evaluate the best way to meet your requirements.

[Lightning Experience Adoption: More Ways to Discover and Adopt the New Salesforce](#)

You're on the way to fully transitioning your org to Lightning Experience. How can you ensure that users embrace the new Salesforce? If they're slow to move from Salesforce Classic, encourage them to stay in Lightning Experience by automatically switching them every week. Salesforce Classic users see what they're missing in Lightning Experience with new learning prompts. As always, run the Lightning Experience Readiness Check to learn how Summer '18 changes impact your Salesforce implementation. And, as you make the move to Lightning Experience, track usage to better understand and optimize your adoption.

[New URL Format for Lightning Experience and the Salesforce Mobile App](#)

It's official! There's a new URL format in town. When setting up pointers to areas in your org, take advantage of our shorter, easier-to-understand URLs.

[Evaluate Your Implementation with Salesforce Optimizer](#)

Optimizer takes the guesswork out of how to best maintain features to help your users get work done more efficiently. Salesforce is continually expanding the report to include more features. Version 2.5 of the Optimizer report is now available. Check back for more updates to the Salesforce Optimizer report throughout the release.

[Convert JavaScript Buttons to Lightning-Friendly Alternatives With the Lightning Experience Configuration Converter \(GA\)](#)

JavaScript buttons getting in the way of your move to Lightning Experience? The Lightning Experience Configuration Converter can help. With just a few clicks, it scans your org for simple JavaScript buttons, converts them into point-and-click alternatives, and then deploys everything right into your org.

[Search: Object-Level Searching for Better-Focused Results, Standard Synonym Groups, and More Filters](#)

Easily focus global search to any searchable object, use standard synonyms without having to create them, filter search results for opportunities, leads, contacts, and other objects, plus other enhancements.

[Personalize the Navigation Bar in Less Time](#)

We've made it easier for users to personalize their navigation in Lightning apps. Your users can get back to work in no time with an enhanced user interface. Or, users can simply drag items around the navigation bar to where they want them to quickly adjust the order.

[Customize Your Theme with Image Cropping and Color Overrides](#)

Get just the right look for your theme without wasting time with photo editing software. Use the cropping and resizing tool to select the part of the image you want to use. After you upload a picture, drag it around to crop. Or adjust the zoom on the picture to resize the final look. While you're at it, you can also change the brand color.

[Streamline Your List Views with Detailed Filters](#)

You no longer have to switch to Salesforce Classic to use detailed list view filter criteria. Find important data in your list views with more detailed filters in Lightning Experience, and supercharge your workflow.

[Make Inline Edits While Using Filter Logic](#)

Inline editing and filtering logic come together to make your list views more powerful. No setup needed! In Lightning Experience, you can start making inline edits to your list views that use filter logic right away. A few exceptions: Inline editing doesn't work for multi-record type list views or when the field isn't editable. Salesforce Classic doesn't support inline editing with filter logic.

[See Field Dependencies While Editing a Record Details Page](#)

It's now easy to view and update all dependent and controlling fields when editing a picklist or checkbox on a Record Details page.

[Organize Records with Topics](#)

Topics provide a way to organize records by theme. Now you can use topics on records in Lightning Experience by adding the Topics component to record pages. Topics are automatically enabled for all available standard objects. If you used topics on records in Salesforce Classic, after you add the Topics component, your users see previously added topics on the same records in Lightning Experience.

[Lightning Console Apps: Guided Flows, More APIs, and Workspace Link Sharing](#)

Enhance your console app with Lightning Guided Engagement, and walk your console users through your business processes. You can also customize your console app with more Lightning Console JavaScript APIs. Link sharing comes to the console and lets your console users share links to their workspace, including its subtabs, with other users.

[Salesforce Surveys: More Options for Gathering Refined Data](#)

Salesforce Surveys gives you more control to create beautiful surveys that gather exactly the data you need.

[Easily Assign Cisco Spark and WebEx Permissions](#)

When you turn on Cisco Spark or WebEx for Salesforce, all users have access by default. You can turn off these permissions and give only a subset of users access.

[Give Private Feedback Without Having to Opt In](#)

When you send feedback about Lightning Experience using the link in the Help Menu, you don't have to explicitly choose to send your contact information. Your information is always kept private and safe, and it's deleted one year after you submit the feedback form.

Get Guidance for Data Protection and Privacy Regulations

Work your way toward complying with data protection and privacy regulations. Regardless of the regulations and policies with which you're complying, we give you guidance to help you evaluate the best way to meet your requirements.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

Why: Data protection and privacy regulations can require you and your company to keep individuals' personal data secure and private. These are some of the regulations that are important to many companies collecting and processing their customers' data.

- General Data Protection Regulation (GDPR), European Union
- Personal Information Protection Act (PIPA), Japan
- Health Insurance Portability and Accountability Act (HIPAA), United States
- Privacy Act, Australia
- Personal Information Protection and Electronic Documents Act (PIPEDA), Canada

How: We give you guidance on some of the common privacy principles in [Data Protection and Privacy](#).

SEE ALSO:

[Data Protection and Privacy: Enhancements to the Individual Object](#)

Lightning Experience Adoption: More Ways to Discover and Adopt the New Salesforce

You're on the way to fully transitioning your org to Lightning Experience. How can you ensure that users embrace the new Salesforce? If they're slow to move from Salesforce Classic, encourage them to stay in Lightning Experience by automatically switching them every week. Salesforce Classic users see what they're missing in Lightning Experience with new learning prompts. As always, run the Lightning Experience Readiness Check to learn how Summer '18 changes impact your Salesforce implementation. And, as you make the move to Lightning Experience, track usage to better understand and optimize your adoption.

IN THIS SECTION:

[Encourage Users to Adopt Lightning Experience](#)

You have a new way to amp up adoption without any additional setup. Users who have access to Lightning Experience are automatically switched from Salesforce Classic to Lightning Experience on a weekly basis. To ensure that users have the best onboarding experience, they see getting-started resources when they're switched.

[Discover Why It's Better in Lightning Experience](#)

In April 2018, Salesforce started rolling out feature prompts to teach users how Lightning Experience helps you and your users work faster and smarter. Users see the prompts only when using a specific feature, such as tasks, calendar, or dashboards, in Salesforce Classic. And because learning about a feature works best when it's done in context, users are shown how to use the same feature in Lightning Experience. Throughout 2018, Salesforce will roll out more prompts to make learning and onboarding easier.

[Let the Readiness Report Be Your Guide to Lightning Experience](#)

Run the Readiness Check to get the latest Lightning Experience news on features that we evaluate. Highlights for Summer '18 include advice about JavaScript buttons that you can replace with our new sample Lightning components. You also get prescriptive, step-by-step support setting up activities. And if you haven't checked your readiness in a while, it's a great idea to do it again. That way, you see other recent updates, including new advice on lookup filters and Salesforce Knowledge, and the redesigned report summary section, called "Which Features Are Ready?". Customers on Plus, Premier, and Signature Success Plans also see content customized exclusively for those programs.

[Get Insight into User Activities with the Lightning Usage App](#)

Track adoption and usage of Lightning Experience. The Lightning Usage App includes charts for daily and monthly active users, number of users switching to Salesforce Classic, and more. These quantifiable measures help you understand your users' experience and optimize your resources for training and other support.

[Adoption Manager Emails Disabled](#)

Salesforce Adoption Manager emails, which encourage adoption of the Salesforce app and Lightning Experience, will no longer be sent to users starting on approximately June 30, 2018. The setup page for enabling Adoption Manager will also be removed. Salesforce is providing admins with other ways to encourage users to switch to Lightning Experience and to control in-app messaging for onboarding and assistance.

[Users Get Lightning Experience Only in Some New Orgs](#)

Starting in June 2018, all new orgs for certain editions will be configured so that end users work exclusively in Lightning Experience. Admin users in these orgs will have access to Salesforce Classic, but they won't be able to disable Lightning Experience or grant users access to Salesforce Classic.

[New Banner Encourages Admins to Transition to Lightning Experience](#)

A new Salesforce Notification Banner appears to admins encouraging them to visit the Lightning Experience Migration Assistant and to run the Lightning Experience Readiness Check. The Salesforce banner appears on all pages for accounts, contacts, and dashboards, and in the setup area for the org. The Salesforce banner reaches admins who have missed important updates about Lightning Experience transition tools.

[Roll Out the Welcome Mat for New Lightning Experience Users](#)

The first time that users log in to Lightning Experience they're presented with useful resources for getting up and running quickly. You can customize the content to introduce the targeted resources that your users need.

[Learn Why Users Are Switching Back to Salesforce Classic](#)

Discover why your users aren't adopting Lightning Experience by going to the source. A form prompts your users for feedback when they switch back to Salesforce Classic. Use the responses to educate users about productivity features and fine-tune your org customizations.

Encourage Users to Adopt Lightning Experience

You have a new way to amp up adoption without any additional setup. Users who have access to Lightning Experience are automatically switched from Salesforce Classic to Lightning Experience on a weekly basis. To ensure that users have the best onboarding experience, they see getting-started resources when they're switched.

Where: This change applies to Lightning Experience and Salesforce Classic in the Group, Professional, Enterprise, Performance, and Unlimited editions.

When: Automatic switching is available starting on May 11, 2018.

Who: Only users with access to Lightning Experience are switched.

Why: For users who need reminding about all the great features and productivity gains from Lightning Experience, the switch gives them a little push to start exploring.

How: You choose whether the switch occurs daily or weekly. The default is weekly. The approximate reset is 1:00 AM daily and Sunday 1:00 AM for weekly. Times are local time for the data center which supports your instance. The switch happens the next time the user logs in.

Upon login after the switch, users see a welcome mat with videos, Trailhead modules, and Help resources. Users can return to Salesforce Classic, but they are switched to Lightning Experience upon login.

We recommend disabling switching only for a specific group of users by using a permission set, instead of disabling it for the entire org.

From Setup in Lightning Experience, enter *Lightning* in the Quick Find box, then select **Lightning Experience**. Go to the Set Up Users tab in the Lightning Experience Migration Assistant.

SEE ALSO:

[Help: Encourage Users to Stay in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Discover Why It's Better in Lightning Experience

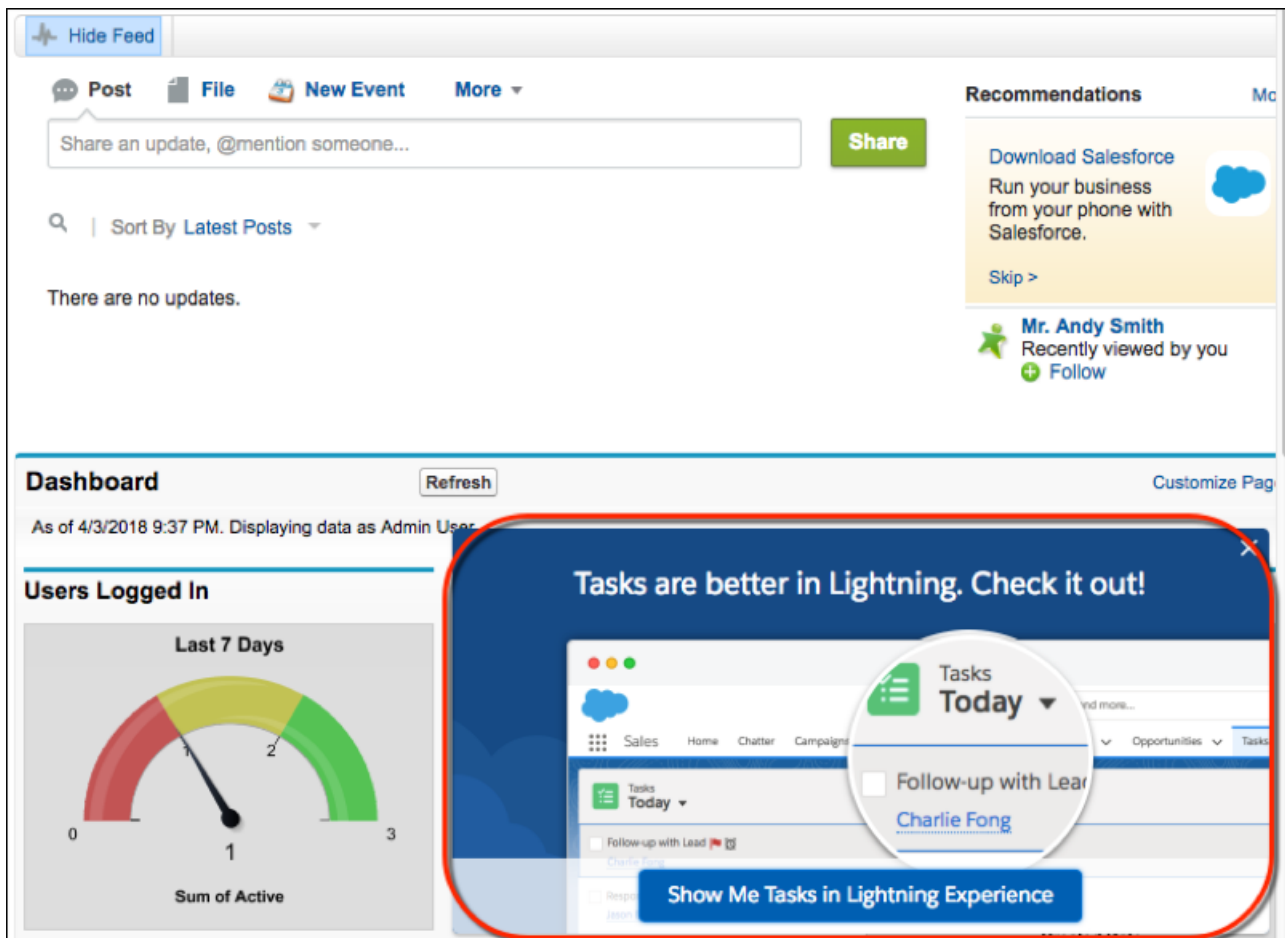
In April 2018, Salesforce started rolling out feature prompts to teach users how Lightning Experience helps you and your users work faster and smarter. Users see the prompts only when using a specific feature, such as tasks, calendar, or dashboards, in Salesforce Classic. And because learning about a feature works best when it's done in context, users are shown how to use the same feature in Lightning Experience. Throughout 2018, Salesforce will roll out more prompts to make learning and onboarding easier.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Performance, Developer, and Unlimited editions.

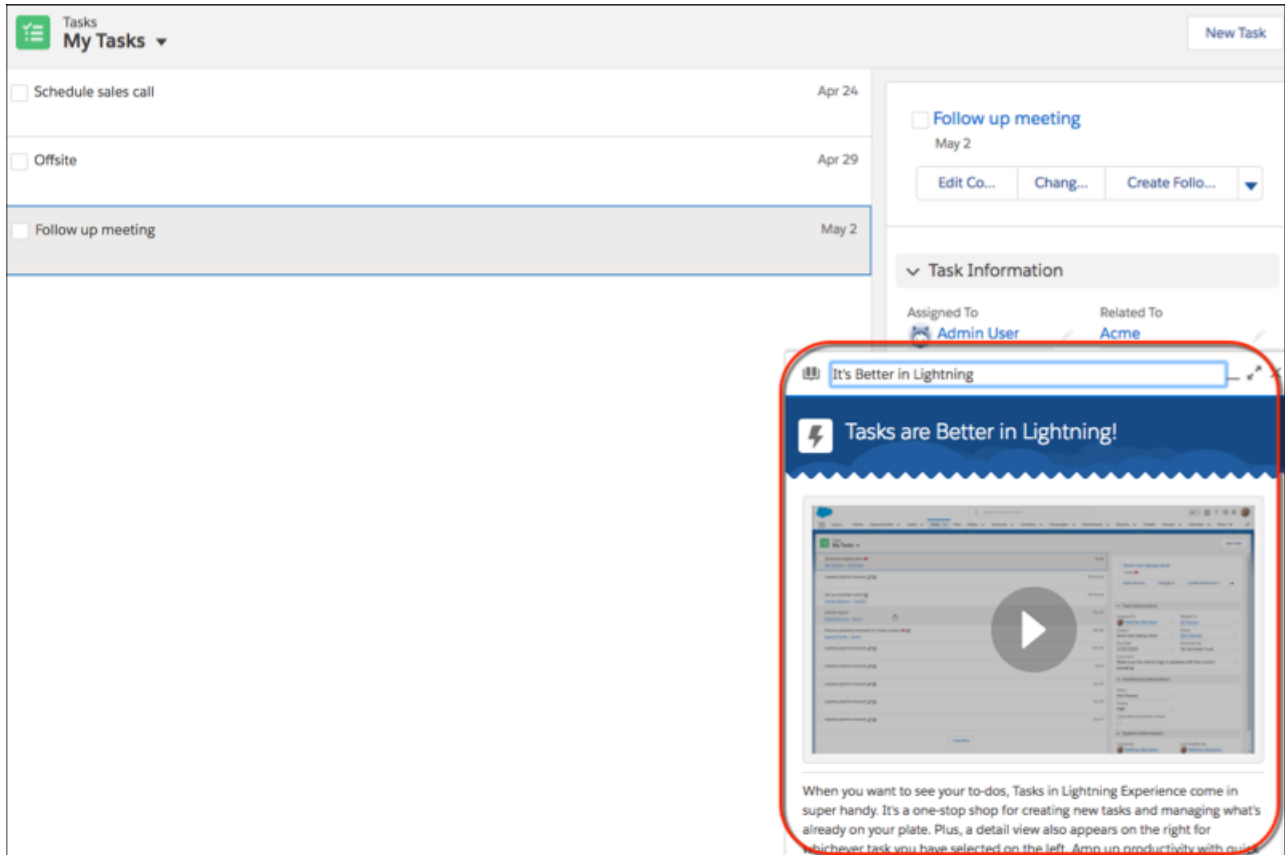
Who: Only users with access to Lightning Experience see the feature prompts.

When: Users started seeing prompts in April 2018. New feature prompts will be rolled out throughout the release.

Why: The feature prompts appear for users only when they complete a specific action, such as viewing a task.



If users choose to explore a feature in the new interface, they're greeted with helpful tips and a short video explaining how they can work faster and smarter in Lightning Experience.



How: You can control which prompts appear and choose what works best for your org's Lightning Experience rollout process. In Lightning Experience Setup, enter *Onboarding & Assistance* in the Quick Find box.

You can also control the Try Lightning Experience Now prompt from the Onboarding & Assistance setup page. This prompt reminds users that they can work smarter and faster in Lightning Experience. The prompt is available in all Lightning Experience supported languages, not just English.

SEE ALSO:

[Help: Encourage Users to Work in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Let the Readiness Report Be Your Guide to Lightning Experience

Run the Readiness Check to get the latest Lightning Experience news on features that we evaluate. Highlights for Summer '18 include advice about JavaScript buttons that you can replace with our new sample Lightning components. You also get prescriptive, step-by-step support setting up activities. And if you haven't checked your readiness in a while, it's a great idea to do it again. That way, you see other recent updates, including new advice on lookup filters and Salesforce Knowledge, and the redesigned report summary section, called "Which Features Are Ready?". Customers on Plus, Premier, and Signature Success Plans also see content customized exclusively for those programs.


Where: This change applies to Lightning Experience, Salesforce Classic, and SalesforceA in Professional, Enterprise, Performance, Unlimited, and Developer editions.

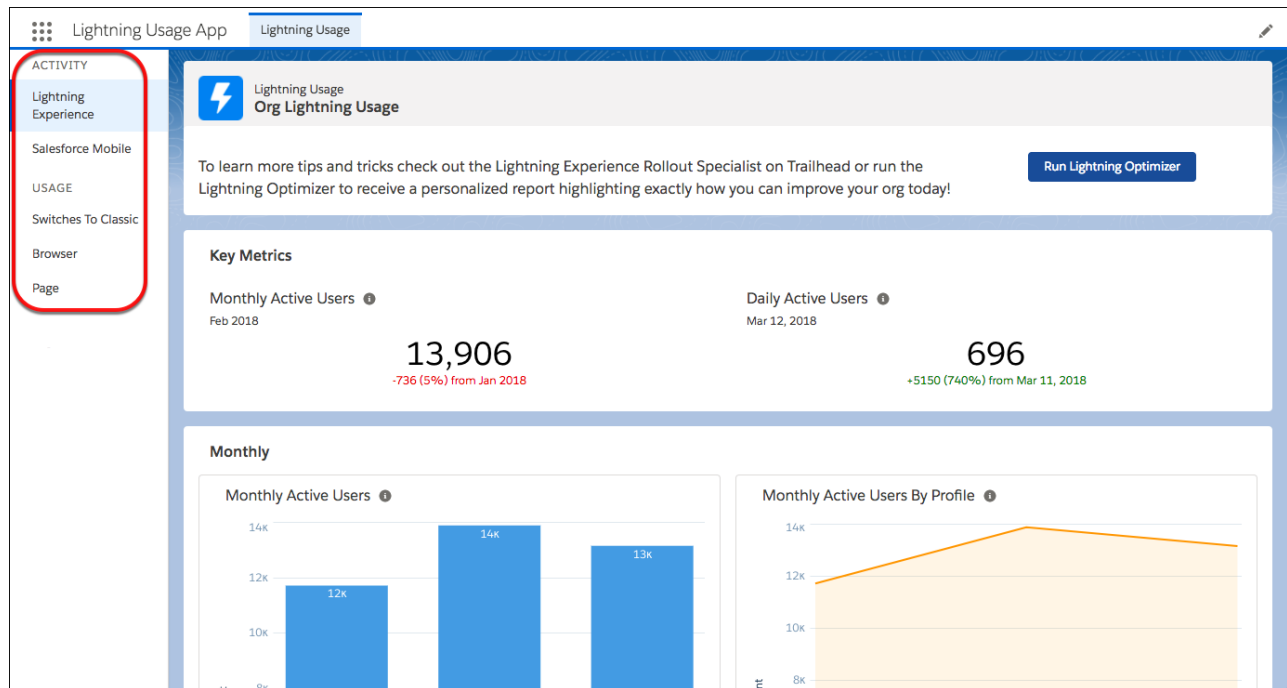
How: Run the Readiness Check from Setup. Click **Get Started** in the Migration Assistant tile. On the Check Readiness tab, click **Check Readiness**.

Get Insight into User Activities with the Lightning Usage App

Track adoption and usage of Lightning Experience. The Lightning Usage App includes charts for daily and monthly active users, number of users switching to Salesforce Classic, and more. These quantifiable measures help you understand your users' experience and optimize your resources for training and other support.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions. The Lightning Usage App is not available for sandbox orgs.

How: To access the Lightning Usage app, click , enter *Lightning Usage*, and click **Lightning Usage**. Click a tab under **ACTIVITY** or **USAGE** on the left side of the page to view the associated data.



The Lightning Usage App API includes objects that represent Lightning Usage metrics. See the `LightningToggleMetrics`, `LightningUsageByAppTypeMetrics`, `LightningUsageByBrowserMetrics`, `LightningUsageByFlexiPageMetrics`, and `LightningUsageByPageMetrics` objects in [New Objects](#).

Adoption Manager Emails Disabled

Salesforce Adoption Manager emails, which encourage adoption of the Salesforce app and Lightning Experience, will no longer be sent to users starting on approximately June 30, 2018. The setup page for enabling Adoption Manager will also be removed. Salesforce is providing admins with other ways to encourage users to switch to Lightning Experience and to control in-app messaging for onboarding and assistance.

Where: This change applies to Lightning Experience and all versions of the mobile app in all editions. Emails were delivered to users with full Salesforce licenses only. Community, Partner, and Chatter users aren't included.

SEE ALSO:

[Lightning Experience Adoption: More Ways to Discover and Adopt the New Salesforce](#)

Users Get Lightning Experience Only in Some New Orgs

Starting in June 2018, all new orgs for certain editions will be configured so that end users work exclusively in Lightning Experience. Admin users in these orgs will have access to Salesforce Classic, but they won't be able to disable Lightning Experience or grant users access to Salesforce Classic.

Where: This change applies to trials and purchased subscriptions for Lightning Experience in Sales Cloud Professional and Service Cloud Essentials editions. Sales Cloud Essentials edition already works this way today.

Why: Customers using Lightning Experience are 41% more productive than those working in Salesforce Classic. To ensure new customers benefit from these productivity gains, we're making some configuration changes for new Salesforce orgs.

How: If your new org includes this change but you believe that your users need access to Salesforce Classic, file a case with Salesforce Support to request an exception.

To request an exception:

1. Go to [Salesforce Help & Training Portal Help Finder](#) and log in with your Salesforce credentials .
2. Click the **Feature Activation** topic and then the **Other** category .
3. Click **Log a New Case**.
4. Enter *Enable Classic* in the **Subject** field.
5. Enter details on why you are requesting end user access to Salesforce Classic in the **Description** field .
6. Check that the OrgId is accurate and then submit the case.

SEE ALSO:

[Salesforce Help: Lightning Experience Only Editions \(can be outdated or unavailable during release preview\)](#)

New Banner Encourages Admins to Transition to Lightning Experience

A new Salesforce Notification Banner appears to admins encouraging them to visit the Lightning Experience Migration Assistant and to run the Lightning Experience Readiness Check. The Salesforce banner appears on all pages for accounts, contacts, and dashboards, and in the setup area for the org. The Salesforce banner reaches admins who have missed important updates about Lightning Experience transition tools.

Where: This change applies to Salesforce Classic in all editions.

When: The Salesforce banner starts appearing to admins on July 10, 2018.

Who: The banner is only shown to admins who are still working in Salesforce Classic with either the Customize Application, Modify All Data, or Manage Users user permission. End users don't see the new Salesforce Banner.

How: If you disabled a previous version of the Salesforce banner, this new banner still appears. Previous Salesforce banner settings don't apply. If you don't want the new Salesforce banner to appear, you can disable it.

From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Deselect **Enable Salesforce Notification Banner**.

SEE ALSO:

[Salesforce Help: Disable the Salesforce Notification Banner](#)

Roll Out the Welcome Mat for New Lightning Experience Users

The first time that users log in to Lightning Experience they're presented with useful resources for getting up and running quickly. You can customize the content to introduce the targeted resources that your users need.

Where: This feature applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: The ability to turn off or to customize the welcome information is available starting on August 16, 2018. The welcome mat starts appearing to users the first time they log in to Lightning Experience toward the end of August 2018.

Who: The welcome mat is shown only to Lightning Experience–enabled users who are logging in to the interface for the first time. Only new users created after the welcome mat is released see the welcome mat.

Why: Help users ramp up quickly and reap all the productivity benefits of Lightning Experience. Users can also access these helpful resources at any time on any page by selecting **Welcome to Lightning Experience** from the help menu.

Welcome to Lightning Experience

You're going to love how the new Salesforce boosts your productivity. Want to get ramped up quickly? Check out these goodies.

Was this helpful?

3 minutes **Take It for a Spin**
Orient yourself with this quick tour of the place.

5 minutes **Find Your Way Around**
Learn where to find key features.

15 minutes **Get Your Bearings**
Start taking advantage of the powerful new Salesforce.

10 minutes **Become a Lightning Experience Pro**
Elevate your daily productivity.

Two different welcome mats appear: one when a user first logs in to Lightning Experience, and another when a user is automatically switched from Salesforce Classic to Lightning Experience. Both types of welcome mats are updated when you use custom content. You can use parameters to customize the content of the welcome mats individually.

How: From Setup in Lightning Experience, enter *onboarding* in the Quick Find box, and then select **Onboarding & Assistance**. Find the **Lightning Experience Welcome Mat** section.

The welcome mat is enabled and displays the default resources created by Salesforce. To display a custom welcome mat, create a CSP trusted site before updating.

SEE ALSO:

[Salesforce Help: Encourage Users to Work in Lightning Experience](#)

[Salesforce Help: Create CSP Trusted Sites to Access Third-Party APIs](#)

Learn Why Users Are Switching Back to Salesforce Classic

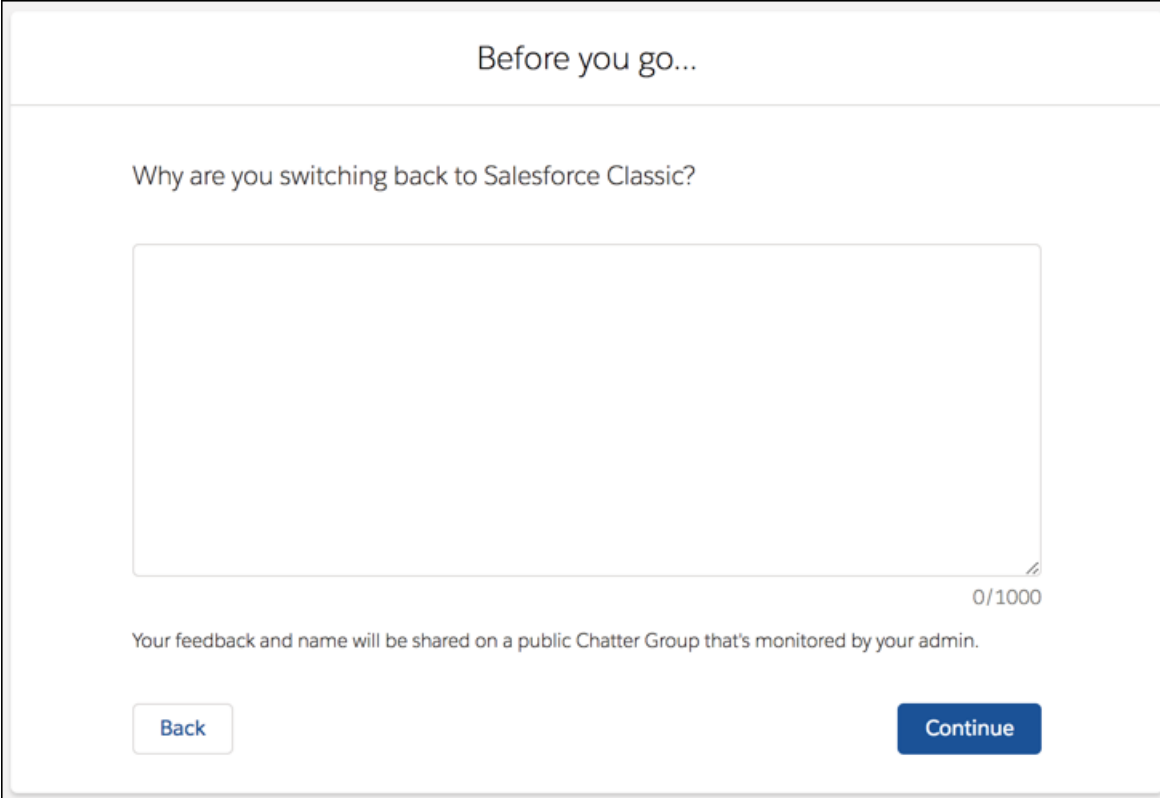
Discover why your users aren't adopting Lightning Experience by going to the source. A form prompts your users for feedback when they switch back to Salesforce Classic. Use the responses to educate users about productivity features and fine-tune your org customizations.

Where: This feature applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. Chatter must be enabled.

Where: The feedback form was made available in late August 2018.

Why: The feedback form appears when users switch to Salesforce Classic. Choose whether to keep the default feedback question or write your own. Select how often the form appears and in which public Chatter group to store the feedback.

Users write the reason, which is posted in your chosen public Chatter group. Users are notified in the form that their feedback is shared in a public group where everyone can contribute to the conversation and see other commonly asked questions. Users aren't required to add feedback before switching back to Salesforce Classic.



The screenshot shows a feedback form titled "Before you go...". The main question is "Why are you switching back to Salesforce Classic?". Below the question is a large text input field with a character count of "0/1000" in the bottom right corner. Below the input field, there is a disclaimer: "Your feedback and name will be shared on a public Chatter Group that's monitored by your admin." At the bottom of the form, there are two buttons: "Back" (a light blue button) and "Continue" (a dark blue button).

How: From Setup in Lightning Experience, enter *onboarding* in the Quick Find box, and then select **Onboarding & Assistance**. Turn on the feature under **Switch to Salesforce Classic Feedback Form**.

New URL Format for Lightning Experience and the Salesforce Mobile App

It's official! There's a new URL format in town. When setting up pointers to areas in your org, take advantage of our shorter, easier-to-understand URLs.

Where: This change applies to URLs in Lightning Experience standard apps, Lightning Experience console apps, and all versions of the mobile app in all editions. Communities aren't affected.

Why: The new URL format is more readable, addressing the issue of being directed to an unexpected location when accessing Lightning Experience URLs before authenticating.

Here are some examples of the new format.


- Object Home page
 - Previous format: `https://<lightning.domain.com>/one/one.app/#/sObject/Account/home`
 - New format: `https://<lightning.domain.com>/lightning/o/Account/home`
- Record page
 - Previous format:
`https://<lightning.domain.com>/one/one.app#/sObject/006R000000245p1IAA/view`
 - New format:
`https://<lightning.domain.com>/lightning/r/Opportunity/006R000000245p1IAA/view`

See how `/lightning` has replaced `/one/one.app`? Existing URLs that use `/one/one.app`, like ones you've saved or have in emails, continue to work. When they're executed, they're translated into the new format.

In console apps, you can even use the new URL format to share your workspace and active subtab by copying the URL directly from your browser's address bar. You can also use the new URLs with the Lightning Console JavaScript API. Nifty!

How: Custom or installed Lightning components that parse a URL might break or behave differently after this change, especially components with logic that relies on `window.location` or the `aura:locationChange` event.

If you have query string parameters appended to `/one/one.app`, such as `/one/one.app?myparam1=xyz&myparam2=abc`, they're rewritten as `/lightning?0.myparam1=xyz&0.myparam2=abc`.

 **Note:** Visualforce page URLs with `/apex/pageName` in the file path aren't translated into the new URL format. When executed, those URLs still use the `/one/one.app` URL format.

For more details, see the [FAQ](#).

SEE ALSO:

[Copy and Share Your Workspace and Active Subtab from the Address Bar](#)

Evaluate Your Implementation with Salesforce Optimizer

Optimizer takes the guesswork out of how to best maintain features to help your users get work done more efficiently. Salesforce is continually expanding the report to include more features. Version 2.5 of the Optimizer report is now available. Check back for more updates to the Salesforce Optimizer report throughout the release.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: As of February 2018, Optimizer evaluates only the following user licenses.

- Chatter Only (Chatter Plus)

- Company Community User
- Lightning Platform App Subscription
- Lightning Platform - One App
- Knowledge Only User
- Salesforce
- Salesforce Platform

As of February 2018, Optimizer evaluates whether you enabled My Domain in your org.

As of the April 2018 version 2.3 release, Chatter adoption in Salesforce mobile apps is no longer evaluated.

As of the June 2018 version 2.4 release, notes inform you about which sections have been removed from the report because of timeout errors.

As of the August 2018 version 2.5 release:

- We now offer a CSV file with some of the report's findings. After you run the report, you can find it in Salesforce Files. Use for data trending and historical analysis.
- We updated the Unused Report section to detail reports' last run date. Get more information to aid your decision to delete unused reports.

How: Run the Salesforce Optimizer from Setup. Enter *optimizer* in the Quick Find box, then select **Optimizer**. Select **Run Report**.

Need more help getting started? Check out the new video.

 [Improve Your Org with Salesforce Optimizer \(English Only\)](#)

You can also sign up for the [Clean Up and Supercharge Your Org with Salesforce Optimizer](#) webinar. Or, sign up for [Optimizer Rescue](#) and have Salesforce experts help you.

Convert JavaScript Buttons to Lightning-Friendly Alternatives With the Lightning Experience Configuration Converter (GA)

JavaScript buttons getting in the way of your move to Lightning Experience? The Lightning Experience Configuration Converter can help. With just a few clicks, it scans your org for simple JavaScript buttons, converts them into point-and-click alternatives, and then deploys everything right into your org.

Where: This feature is available for Lightning Experience in all editions.

When: The Lightning Experience Configuration Converter is generally available as of June 1, 2018.

Who: To use this tool, you must have the Customize Application user permission, and have My Domain deployed in your org.

Why: The Lightning Experience Configuration Converter looks at what your org's JavaScript buttons are doing, and recreates them as Lightning components, quick actions, or other declarative solutions, without touching the original buttons. Before committing any changes, you can preview the new component code or the declarative steps and verify the alternatives work as needed.

How: The Lightning Experience Configuration Converter is a standalone tool that lives outside of Salesforce. We recommend that you run it in a sandbox or Developer org first, then migrate your changes to your production org.

To get started, visit <https://lightning-configuration.salesforce.com/> and log in with your org credentials.

IN THIS SECTION:

[Whitelisted IP Addresses for the Lightning Experience Configuration Converter Have Changed](#)

If you have users who are using the Lightning Experience Configuration Converter, update the whitelisted IP addresses on their profiles so they can continue using the tool.

SEE ALSO:

[Salesforce Help: Lightning Experience Configuration Converter Considerations](#)

Whitelisted IP Addresses for the Lightning Experience Configuration Converter Have Changed

If you have users who are using the Lightning Experience Configuration Converter, update the whitelisted IP addresses on their profiles so they can continue using the tool.

Where: This feature is available for Lightning Experience in all editions.

When: The change to the required whitelisted IP addresses took place on July 19, 2018.

How:

Remove These Whitelisted IP Addresses	Add These Whitelisted IP Addresses
<ul style="list-style-type: none"> • 52.25.4.60 • 52.39.45.101 • 52.38.244.243 • 52.39.44.232 	<ul style="list-style-type: none"> • 52.2.2.209 • 52.203.195.34 • 52.200.207.131 • 52.72.119.132

Search: Object-Level Searching for Better-Focused Results, Standard Synonym Groups, and More Filters

Easily focus global search to any searchable object, use standard synonyms without having to create them, filter search results for opportunities, leads, contacts, and other objects, plus other enhancements.

IN THIS SECTION:

[Search the Object You Want Easily from Anywhere](#)

When you want to search an object, cut the clutter, and see results only for what you're searching for, from anywhere in the app. Choose any searchable object in the dropdown list next to the global search box. Enter your search term, and both instant results and full search results are limited to that object.

[Save Time with Standard Synonym Groups](#)

Synonym groups save users time by taking the guesswork out of entering the right search term. (Is it a *hard hat*, *helmet*, or *brain bucket*?) Now, Salesforce saves *you* time with standard synonym groups containing commonly associated terms, like file and document, or password and credentials. Standard synonyms are available for Salesforce Knowledge objects in all orgs.

[Filter Search Results for More Objects](#)

So many opportunities (or leads or contacts) with similar names, and so little time to find the one that you're looking for. Now, in addition to accounts and files, you can now filter search results for opportunities, leads, contacts, cases, tasks, notes, dashboards, and people.

[Enhanced Support for Search](#)

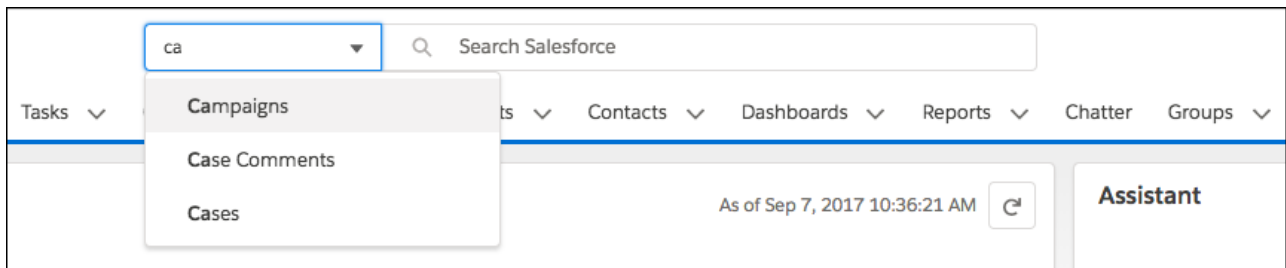
We've enhanced the overall search experience.

Search the Object You Want Easily from Anywhere

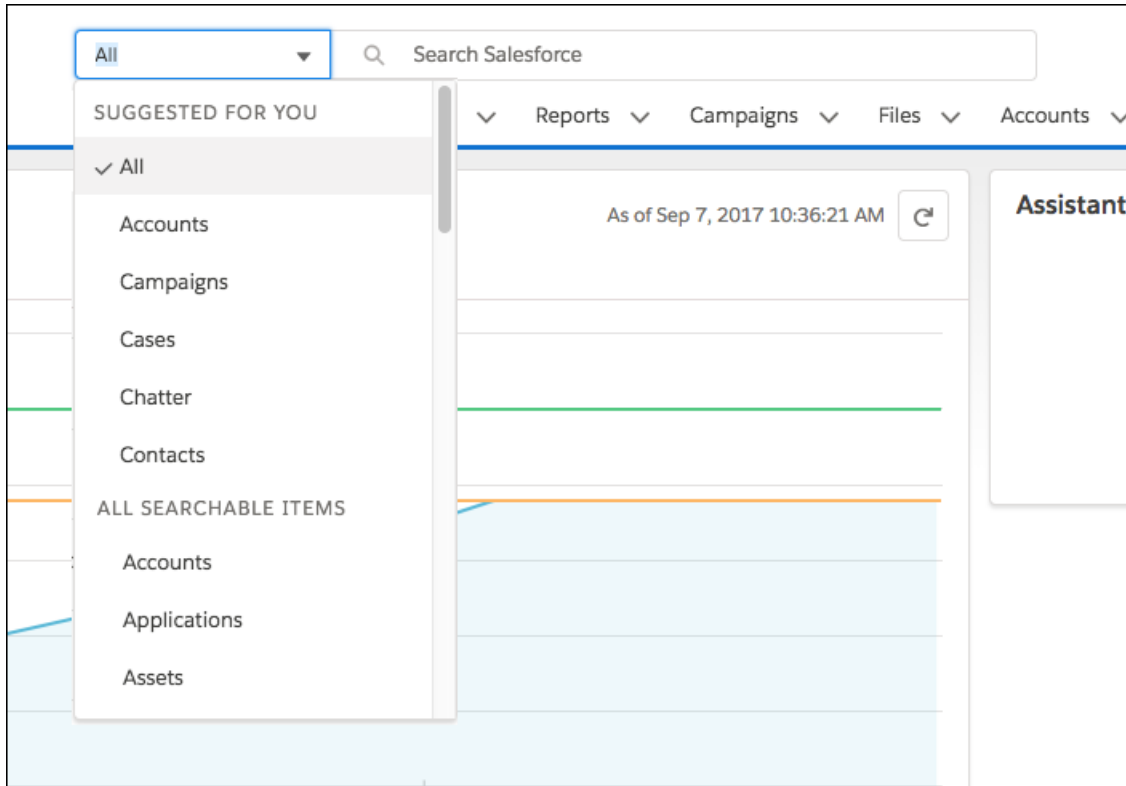
When you want to search an object, cut the clutter, and see results only for what you're searching for, from anywhere in the app. Choose any searchable object in the dropdown list next to the global search box. Enter your search term, and both instant results and full search results are limited to that object.

Where: This change applies to Lightning Experience in all editions.

Why: Searching by object type isn't new, but we made it easier and faster. You no longer have to type an object name and choose **Limit search to** from the dropdown. Now you can focus your search to any searchable object simply by choosing or typing the object name in the dropdown.



The objects you use most frequently are at the top, followed by the full list of searchable objects in alphabetical order.



When you don't select an object, search works as usual, returning matches from different objects as you type. The Top Results page then shows you the most relevant matches from your most frequently used objects.

SEE ALSO:

[Filter and Sort Search Results in Lightning Experience](#)

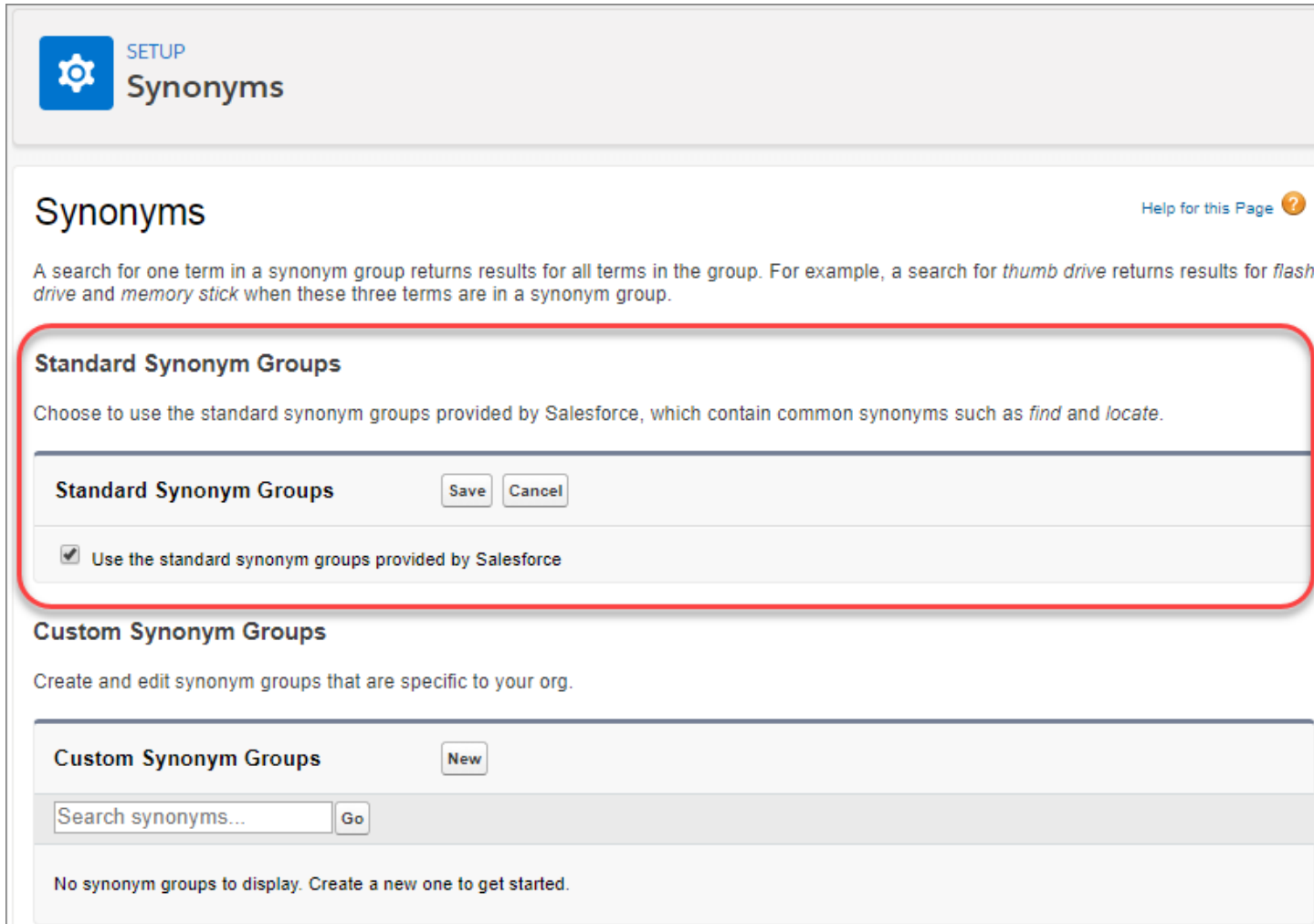
Save Time with Standard Synonym Groups

Synonym groups save users time by taking the guesswork out of entering the right search term. (Is it a *hard hat*, *helmet*, or *brain bucket*?) Now, Salesforce saves *you* time with standard synonym groups containing commonly associated terms, like file and document, or password and credentials. Standard synonyms are available for Salesforce Knowledge objects in all orgs.

Where: This change applies to both Salesforce Classic and Lightning Experience, and the Salesforce apps (iOS, Android, mobile browser) in all editions.

Why: Get the benefits of synonym groups without having to spend any time creating them. Standard synonym groups include common English language synonyms, such as:

- file, document
- configuration, config
- db, database
- credentials, password
- pictures, photos
- hi, hello
- PO, order



SETUP
Synonyms

Synonyms [Help for this Page](#)

A search for one term in a synonym group returns results for all terms in the group. For example, a search for *thumb drive* returns results for *flash drive* and *memory stick* when these three terms are in a synonym group.

Standard Synonym Groups

Choose to use the standard synonym groups provided by Salesforce, which contain common synonyms such as *find* and *locate*.

Standard Synonym Groups

Use the standard synonym groups provided by Salesforce

Custom Synonym Groups

Create and edit synonym groups that are specific to your org.

Custom Synonym Groups

No synonym groups to display. [Create a new one to get started.](#)

How: Standard synonyms are enabled by default. You can't edit or view the synonym groups, but you can disable all standard synonym groups. You can still create synonym groups for related words specific to your org or industry. The process for adding custom synonym groups remains the same.

SEE ALSO:

[Configure Synonym Groups](#)

[Why Am I Seeing Search Results for Similar Terms?](#)

Filter Search Results for More Objects

So many opportunities (or leads or contacts) with similar names, and so little time to find the one that you're looking for. Now, in addition to accounts and files, you can now filter search results for opportunities, leads, contacts, cases, tasks, notes, dashboards, and people.

Where: This change applies to Lightning Experience in all editions.

Why: Sometimes a keyword search only gets you so far. Narrow down results further by selecting a supported object on the left side of the search results page and then applying filters.

The screenshot displays the Salesforce search interface for the 'Opportunities' object. At the top, a search bar contains the text 'acme'. Below the search bar, a navigation menu includes 'Sales', 'Home', 'Opportunities', 'People', 'Leads', 'Tasks', 'Campaigns', 'Files', and 'More'. The main content area is titled 'Opportunities' and shows '2 Results' filtered by 'Opportunity Name' and sorted by 'Relevance'. A table lists the results:

OPPORTUNITY NAME	ACCOUNT NAME	STAGE	CLOSE DATE
Acme - 200 Widgets	Acme	Prospecting	9/18/2015
Acme - 600 Widgets	Acme	Needs Analysis	7/16/2015

On the left sidebar, under 'SEARCH RESULTS', the 'Opportunities' section is expanded. Below it, a 'REFINE BY' section is visible, with a search box containing the text 'widgets'. The 'REFINE BY' section includes fields for 'Opportunity Name', 'Account Name', 'Stage', and 'Close Date', each with a search or selection control.

How: From Setup, in the Object Manager, go to Search Layouts for each object. Add the fields that users want to filter to the Search Results layout. Supported field types are checkbox, phone number, picklist, text, and URL. You can't filter encrypted fields.

SEE ALSO:

[Filter and Sort Search Results in Lightning Experience](#)

[Configure Search Results in Lightning Experience](#)

Enhanced Support for Search

We've enhanced the overall search experience.

IN THIS SECTION:

[Get Search Results for More Objects](#)

The List Email object, previously called Mass Email, is now searchable. Case Comments are also searchable.

[Search Lemmatization Supports Hebrew](#)

Get better search results in Hebrew with lemmatization support. Lemmatization is a way of grouping variants of a word. For example, when you search for fast, you get matches that contain faster, fasting, or fastest.

[Federated Search Available in Performance Edition](#)

Federated search makes it easy to add external search engines to your org, and now it's supported by Performance edition.

Get Search Results for More Objects

The List Email object, previously called Mass Email, is now searchable. Case Comments are also searchable.

Where: List Email is searchable in Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions. Case Comments are searchable in Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Search Lemmatization Supports Hebrew

Get better search results in Hebrew with lemmatization support. Lemmatization is a way of grouping variants of a word. For example, when you search for fast, you get matches that contain faster, fasting, or fastest.

Where: This change applies to both Salesforce Classic and Lightning Experience, as well as the Salesforce apps (iOS, Android, mobile browser) in all editions except Database.com.

Federated Search Available in Performance Edition

Federated search makes it easy to add external search engines to your org, and now it's supported by Performance edition.

Where: These changes apply to both Salesforce Classic and Lightning Experience, as well as the Salesforce apps (iOS, Android, mobile browser) in all editions except Database.com.

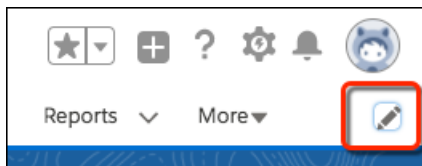
Personalize the Navigation Bar in Less Time

We've made it easier for users to personalize their navigation in Lightning apps. Your users can get back to work in no time with an enhanced user interface. Or, users can simply drag items around the navigation bar to where they want them to quickly adjust the order.

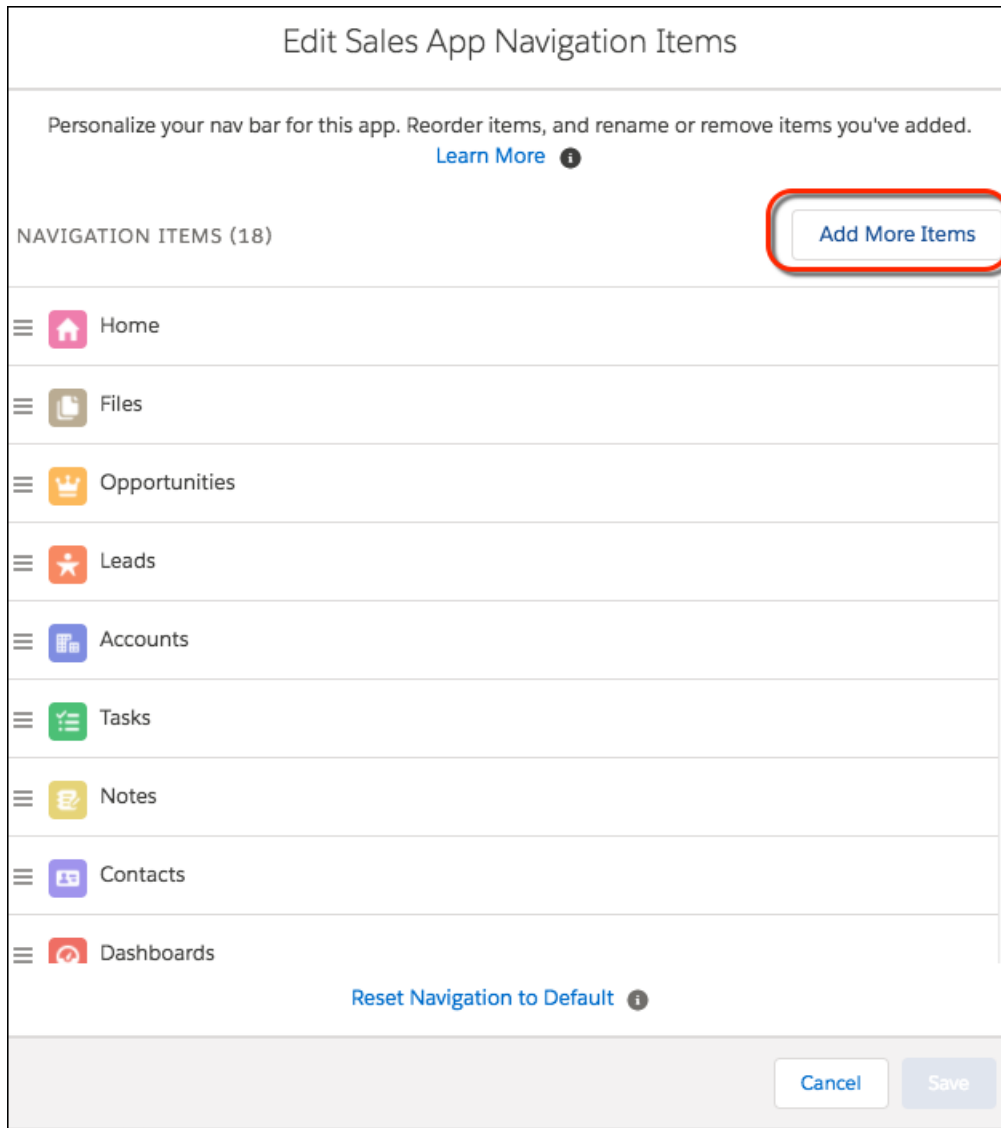
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Why: In the enhanced navigation bar editor, it's easier to search through favorites or all available items to select what to add. The new editor minimizes the need for users to use temporary tabs.

How: Drag items around the navigation bar to reorder. Want to make more changes? Click the pencil icon on the navigation bar to get started.



Click **Add More Items**.



If you don't want your users to personalize the navigation bar for a specific app, you can disable personalization. From Setup in Lightning Experience, go to the **App Manager**. Edit the desired app. On the **App Options** page, select **Disable end user personalization of nav items in this app**. Users can't change the navigation bar when you disable personalization or if it's a Salesforce Classic app.

If you don't want temporary tabs to be created when users access items outside of the app, you can disable the behavior from the same page.

SEE ALSO:

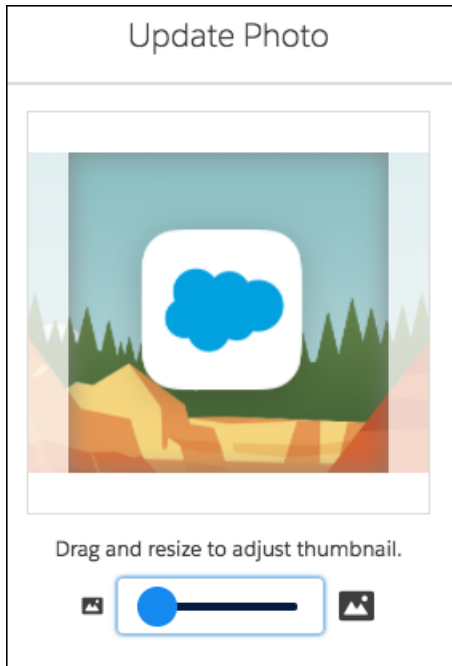
[Help: Personalize the Navigation Bar in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Customize Your Theme with Image Cropping and Color Overrides

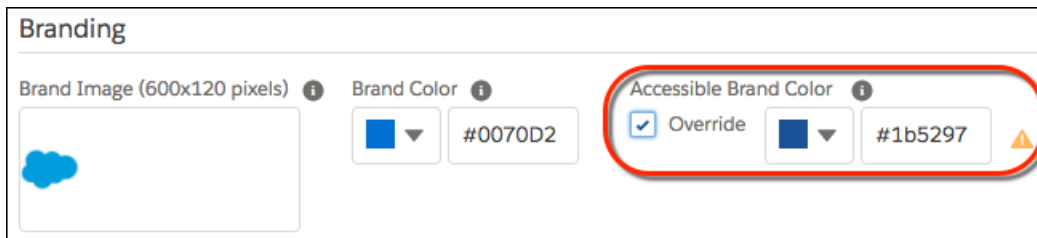
Get just the right look for your theme without wasting time with photo editing software. Use the cropping and resizing tool to select the part of the image you want to use. After you upload a picture, drag it around to crop. Or adjust the zoom on the picture to resize the final look. While you're at it, you can also change the brand color.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions.

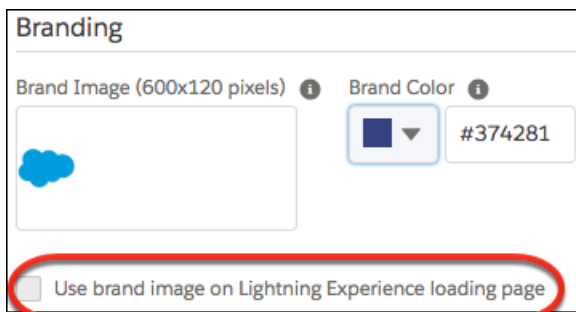
Why: Upload an image. Crop and resize quickly.



Custom themes modify the brand color you specify to make it WCAG 2.0 compliant. We've done the homework to figure out how to adjust your brand color to make the page accessible and easier to read. But if you want to show your exact brand color, you can override the accessible brand color.



You can also use a theme's brand image on the Lightning Experience loading page.



How: From Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**.

SEE ALSO:

[Help: Brand Your Org in Lightning Experience \(can be outdated or unavailable during release preview\)](#)


Streamline Your List Views with Detailed Filters

You no longer have to switch to Salesforce Classic to use detailed list view filter criteria. Find important data in your list views with more detailed filters in Lightning Experience, and supercharge your workflow.


Where: This change applies to Lightning Experience for Essential, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Want to see all the open leads in your sales queue from your latest email campaign? How about your opportunities in Asia that have a high probability of closing? Stay on top of your accounts, contacts, leads, opportunities, and custom objects by surfacing the most relevant information when you need it. With these new filters, you can filter:

- Accounts by territory
- Accounts, cases, and opportunities by teams
- Contacts by campaign
- Leads by queue and campaign
- Opportunities by territory
- Custom objects by queue

 **Note:** Filtering opportunities by territory is available only for the original Territory Management feature. It isn't available for Enterprise Territory Management.

These filters work with existing field filters, so you can create and share nuanced list views with your team.

How: Using these new filters is easy. Choose an object, and click  to access the Filters panel. From there, choose the filters you want to add. The new filter options show up right where your other filter options are.

Make Inline Edits While Using Filter Logic

Inline editing and filtering logic come together to make your list views more powerful. No setup needed! In Lightning Experience, you can start making inline edits to your list views that use filter logic right away. A few exceptions: Inline editing doesn't work for multi-record type list views or when the field isn't editable. Salesforce Classic doesn't support inline editing with filter logic.

Where: This change applies to Lightning Experience for Essential, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

See Field Dependencies While Editing a Record Details Page

It's now easy to view and update all dependent and controlling fields when editing a picklist or checkbox on a Record Details page.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions. This feature is available for Lightning Communities.

How: This option is available with Record Details inline edit and with New, Edit, and Clone options for records. It is not available with Create or Update for Quick Actions, or with Listview inline edit or Sales Path Stage inline edit. This feature is available for objects supported by the UI API, including many standard objects and all custom objects.



Use the link below a picklist or checkbox to display related fields. Update fields as needed, then click **Apply**, and click **Save**.

Organize Records with Topics

Topics provide a way to organize records by theme. Now you can use topics on records in Lightning Experience by adding the Topics component to record pages. Topics are automatically enabled for all available standard objects. If you used topics on records in Salesforce Classic, after you add the Topics component, your users see previously added topics on the same records in Lightning Experience.

Where: This feature is new in Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Your users can use topics to provide information about what they're seeing in the field and from their customers. For example, if support agents are interested in communications standards, they can add the Communications Standards topic to any file that includes communications information. They can add the same topic to cases, contacts, or any other record where they want to include the communications standards theme. After you add the Topics component to record pages, users can easily view, add, and remove topics from records.

Topics on records become links to topic detail pages. If Chatter is enabled, the topic detail page shows posts and comments with the same topic.

How: Create a record page for Lightning Experience, and add the Topics component. You can also add the Topics component to existing record pages. You can configure the title, the placeholder text that appears in the topic editor, and the number of topics shown before the Show More link appears.

Page > Topics

Title

Topics

Placeholder Text ⓘ

Type a topic name and press Enter.

Number of Topics Shown ⓘ

10

✓ Set Component Visibility

Filters

+ Add Filter

For more insight into how your org is using topics on records, create a custom report type with Topic Assignments as the primary object.


SEE ALSO:

[Chatter Features: Lightning Experience Considerations](#)

[IdeaExchange: Include Topics in Lightning](#)

Lightning Console Apps: Guided Flows, More APIs, and Workspace Link Sharing

Enhance your console app with Lightning Guided Engagement, and walk your console users through your business processes. You can also customize your console app with more Lightning Console JavaScript APIs. Link sharing comes to the console and lets your console users share links to their workspace, including its subtabs, with other users.

 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more.](#)

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

IN THIS SECTION:

[Guide Your Console Users with Flows](#)

Lightning Guided Engagement unites your powerful console app with your business processes. Associate flows to records using Salesforce automation tools and then guide console users through your multi-step processes. When the user opens a record with an associated flow, the flow is launched as a subtab. You can also configure flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last.

[Automate Tab Refresh, Change Nav Items, and Listen for Utility Item Clicks with New Lightning Console JavaScript APIs](#)

We've been hard at work adding more methods to the Lightning Console JavaScript API. Some things that you could do with the Salesforce Console Integration Toolkit JavaScript APIs are now available in Lightning Experience. These methods are new in the Lightning Console JavaScript API: `focusNavigationItem()`, `getNavigationItems()`, `getSelectedNavigationItem()`, `refreshNavigationItem()`, `refreshTab()`, and `onUtilityClick()`.

[Copy and Share Your Workspace and Active Subtab from the Address Bar](#)

Agents, sales reps, and other console users can quickly share their workspace and active subtab by copying the URL directly from their address bar.

[Open Custom Lightning Components in Workspace Tabs and Subtabs](#)

No more worrying about URLs becoming out of date. Use `openTab()` and `openSubtab()` with the new `lightning:isURLAddressible` component to directly open custom Lightning components in your workspace.

[Pin Right and Left Sidebars in Your Console App](#)

A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Last release, we gave you pinned region Lightning page templates. This release brings you another template. Customize your Lightning console app with the Console: Pinned Left and Right Sidebars template so that your users can view and work with record information in both sidebars.

SEE ALSO:

[Salesforce Console API](#)

[New URL Format for Lightning Experience and the Salesforce Mobile App](#)

[Salesforce Help: Lightning Experience Console Limitations \(can be outdated or unavailable during release preview\)](#)

Guide Your Console Users with Flows

Lightning Guided Engagement unites your powerful console app with your business processes. Associate flows to records using Salesforce automation tools and then guide console users through your multi-step processes. When the user opens a record with an associated flow, the flow is launched as a subtab. You can also configure flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.


SEE ALSO:

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

Automate Tab Refresh, Change Nav Items, and Listen for Utility Item Clicks with New Lightning Console JavaScript APIs

We've been hard at work adding more methods to the Lightning Console JavaScript API. Some things that you could do with the Salesforce Console Integration Toolkit JavaScript APIs are now available in Lightning Experience. These methods are new in the Lightning Console JavaScript API: `focusNavigationItem()`, `getNavigationItems()`, `getSelectedNavigationItem()`, `refreshNavigationItem()`, `refreshTab()`, and `onUtilityClick()`.

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 **Note:** The corresponding Salesforce Console Integration Toolkit methods invoked from Visualforce pages or web tabs work in Lightning Experience.

SEE ALSO:

[Salesforce Console API](#)

[Salesforce Console Developer Guide: focusNavigationItem \(can be outdated or unavailable during release preview\)](#)

[Salesforce Console Developer Guide: getNavigationItems \(can be outdated or unavailable during release preview\)](#)

[Salesforce Console Developer Guide: getSelectedNavigationItem \(can be outdated or unavailable during release preview\)](#)

[Salesforce Console Developer Guide: refreshNavigationItem \(can be outdated or unavailable during release preview\)](#)

[Salesforce Console Developer Guide: refreshTab \(can be outdated or unavailable during release preview\)](#)

[Salesforce Console Developer Guide: onUtilityClick \(can be outdated or unavailable during release preview\)](#)

Copy and Share Your Workspace and Active Subtab from the Address Bar

Agents, sales reps, and other console users can quickly share their workspace and active subtab by copying the URL directly from their address bar.

Where: This change applies to Lightning Experience for Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

How: Here's an example of a URL containing workspace and subtab info:

```
https://<lightning.domain.com>/lightning/r/<subtab recordId>?ws=/lightning/r/<workspace recordId>
```

SEE ALSO:

[New URL Format for Lightning Experience and the Salesforce Mobile App](#)

Open Custom Lightning Components in Workspace Tabs and Subtabs

No more worrying about URLs becoming out of date. Use `openTab()` and `openSubtab()` with the new `lightning:isUrlAddressable` component to directly open custom Lightning components in your workspace.

Where: This change applies to Lightning Experience for Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

Why: `lightning:isUrlAddressable` provides the following benefits over `force:navigateToComponent` for console apps:

- Future-proofs your apps from changes in URL formats.
- Generates a user-friendly URL for your tabs.
- Opens a Lightning component as a workspace tab or subtab, even if called from a utility, a hover, or another page.
- Gives you control over whether a component can be opened programmatically as a workspace tab or subtab.
- Allows a mechanism to conditionally open a given component more than once or redirect to an already open workspace tab or subtab using the `uid` parameter.

How: Implement `lightning:isUrlAddressible` in your components to generate a `pageReference` that you can use to open components in a workspace tab or subtab.

SEE ALSO:

[New Lightning Navigation APIs for Lightning Components](#)

[Using Page References to Open Tabs and Subtabs in Lightning \(can be outdated or unavailable during release preview\)](#)

Pin Right and Left Sidebars in Your Console App

A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Last release, we gave you pinned region Lightning page templates. This release brings you another template. Customize your Lightning console app with the Console: Pinned Left and Right Sidebars template so that your users can view and work with record information in both sidebars.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

SEE ALSO:

[Add Pinned Regions to Your Console Sidebars](#)

Salesforce Surveys: More Options for Gathering Refined Data

Salesforce Surveys gives you more control to create beautiful surveys that gather exactly the data you need.

IN THIS SECTION:

[Tailor Survey Questions Based on Participant Responses](#)

You no longer have to require participants to click through every survey question. Instead, use logic rules to present a participant a particular follow-up question based on the answer to a previous question. By adding logic rules, participants don't have to wade through irrelevant questions, and you can gather more accurate data.

[Copy a Survey](#)

Why start over when you can copy a survey to replicate its questions and logic? When you copy a survey, it's not associated to the original survey in the database. The copied survey gets a new survey record.

[View a Contact's Survey Invitations](#)

When you look at a contact record, you can now see which surveys that contact has been invited to take. Previously, you couldn't tell if a contact had been invited to take a survey. As a result, some contacts received survey invitations multiple times.

[Get More Detail with the Expanded Rating Question Scale](#)

Get more nuanced responses with a broader rating scale. You can create questions with a scale from 1 to 10. Previously, rating questions went from 1 to 5.

Tailor Survey Questions Based on Participant Responses

You no longer have to require participants to click through every survey question. Instead, use logic rules to present a participant a particular follow-up question based on the answer to a previous question. By adding logic rules, participants don't have to wade through irrelevant questions, and you can gather more accurate data.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Who: Users must either have access to Health Cloud or be assigned to a Survey Creator license to create surveys.

Why: For example, you want to send a survey to attendees of an important meeting. You need to know if any attendees have dietary restrictions. If an attendee responds “yes,” you can follow up by asking about food allergies. If an attendee responds “no,” you can skip the question about food allergies.

Copy a Survey

Why start over when you can copy a survey to replicate its questions and logic? When you copy a survey, it’s not associated to the original survey in the database. The copied survey gets a new survey record.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: In the Survey Builder, click **...**, and then select **Make a Copy**.

View a Contact’s Survey Invitations

When you look at a contact record, you can now see which surveys that contact has been invited to take. Previously, you couldn’t tell if a contact had been invited to take a survey. As a result, some contacts received survey invitations multiple times.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: First, add the Survey Invitations related list to the contact record's page layout.

To see if someone has been invited to take a survey, navigate to the contact record. The Survey Invitations related list appears at the bottom of the contact record if the contact has been invited to at least one survey.

Get More Detail with the Expanded Rating Question Scale

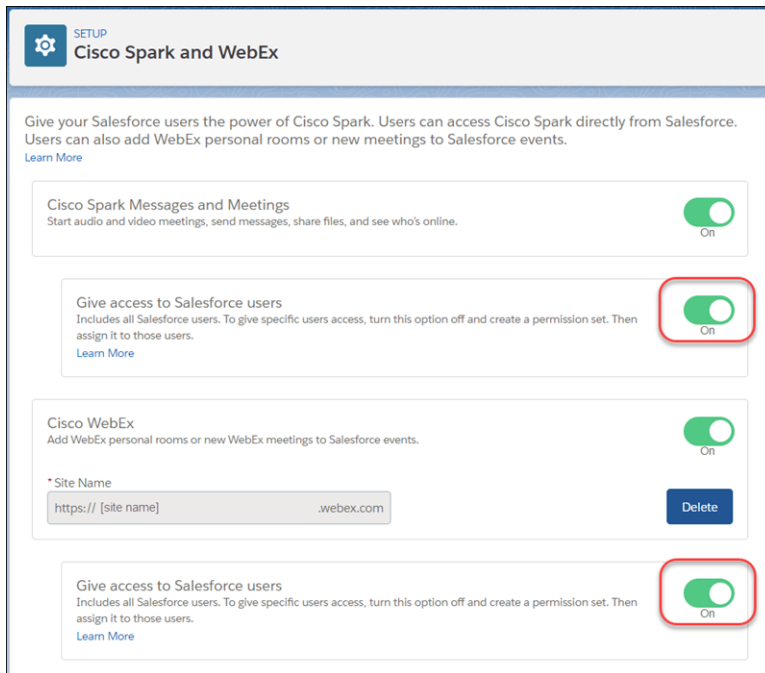
Get more nuanced responses with a broader rating scale. You can create questions with a scale from 1 to 10. Previously, rating questions went from 1 to 5.

Where: This change applies to all surveys in Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Developer, and Unlimited Edition editions where Salesforce Surveys is enabled.

Easily Assign Cisco Spark and WebEx Permissions

When you turn on Cisco Spark or WebEx for Salesforce, all users have access by default. You can turn off these permissions and give only a subset of users access.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer Editions.



How: From Setup, in the Quick Find box, enter *Cisco Spark and WebEx*, and then select **Cisco Spark and WebEx**. On the Cisco Spark and WebEx Setup page, use the toggle to give your users access.

SEE ALSO:

[Give Users Cisco Spark Conversation and WebEx Permissions](#)

Give Private Feedback Without Having to Opt In

When you send feedback about Lightning Experience using the link in the Help Menu, you don't have to explicitly choose to send your contact information. Your information is always kept private and safe, and it's deleted one year after you submit the feedback form.

Where: This change applies to Lightning Experience in all editions.

Why: Previously, when you sent feedback, you could indicate that you wanted Salesforce to also receive your name, email address, and user ID. Now, your basic contact information is sent securely with your feedback and deleted one year later.

Your comments and suggestions help us improve the product. If you'd also like to be invited to customer research sessions, you can use the form to let us know.

The image shows a screenshot of the Salesforce Help & Training interface. On the left, the 'Help & Training' menu is visible, with the 'Give feedback about Salesforce' link circled in red. A red arrow points from this link to the feedback form on the right. The form is titled 'Give feedback about Salesforce' and contains the following elements:

- A header: 'Give feedback about Salesforce'
- A sub-header: 'Help us build the best Salesforce possible. Tell Salesforce Product Management what you think about Lightning Experience. We can't wait to hear from you.'
- A section titled 'Comments' with a text input field containing the placeholder text 'Enter up to 4,000 characters...'
- A paragraph: 'The comments you provide are sent to Salesforce to help us improve the product. If you need help specific to your org, contact your Salesforce admin.'
- A paragraph: 'By submitting this form, you accept that Salesforce will receive your name, email address, and user ID, and might use this information to contact you about your feedback.'
- A paragraph: 'Salesforce will delete your personal data one year after you submit this form.'
- A checkbox with the text: 'Yes, I'd like to receive invitations to customer research sessions. I can unsubscribe at any time.' The checkbox is checked.
- Two buttons at the bottom right: 'Cancel' and 'Submit'.

SEE ALSO:

[Salesforce Help: Find Help in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

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](#)

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.

[What's Different or Not Available in Summer '18 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.

Lightning Experience Features in This Release

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.

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

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[Collaborative Forecasts: More Detailed Forecasts and Forecasting Options](#)

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[Products: Work with Schedules in Lightning Experience](#)

[Accounts: Person Account Setup, Custom Quick Actions, and New Package Validation Available in Lightning Experience](#)

[Path: Path for Contacts, Dependent Picklist Support](#)

Productivity Features

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[Einstein Activity Capture: Wider Availability, Email Insights, and Improved Activity Timeline](#)

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Email Experience: List Emails for Campaigns, Campaign Filter for Contacts and Leads, and Email Attachment Management

Email Templates: Simplified Email Template Management, New Merge Field Language, and Custom HTML Email Templates

Kanban: Update Dependent Picklists

Calendar: Usability Improvements in Lightning Experience

Sales Console: Pinned Sidebars, Lightning Console APIs, and More

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Data Quality

Duplicate Management: Run Duplicate Jobs on Custom Objects

Lightning Data: Clearer Labels, Field Mapping Control, Reviewed Status, Currency Conversion

Lightning for Gmail

Focus on the Features You Need with Improved Design

Log Emails to the Records That You Choose

Microsoft® Integration

Lightning for Outlook: Focused Design and Email Logging Improvements

Salesforce for Outlook: Latest Upgrades and End of Sale in Winter '19

Salesforce CPQ and Billing

Salesforce CPQ: Booking Reports, Faster Order Creation, and Enhanced Quote Line Editor Navigation

Salesforce Billing: New Revenue Agreements

Pardot

Align Sales and Marketing on a Single Platform with Pardot for Lightning (Beta)

Personalize Engage Emails with Salesforce Files

Match Leads to Accounts Without a Website Value

See Fewer False Positives for Leads Matched to Accounts

Other Changes in the Sales Cloud

Filter Account List Views by Territory in Lightning Experience

Display Change for Event Subjects in Calendar

Service

Einstein Bots to the Rescue: Boost Service Team Productivity with Bots (Generally Available)

Case Management

Service Console: Lightning Guided Engagement, Case Teams, and Email Enhancements

Cases: Case Teams, Email Drafts, Apex Email Fields, and More

Omni-Channel: More Options for Routing Work Items in Lightning Experience

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[Filter Related Lists on Service Reports \(Generally Available\)](#)
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[Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments \(Beta\)](#)
[Field Service Managed Package: Resource Schedule Optimization, Gantt Live Updates, and Custom List Filters](#)
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[Snap-Ins Chat: Chat Improvements and the Version 5.0 Code Snippet](#)
[Snap-Ins for Mobile Apps: Create Better, Faster, Leaner Apps](#)
[CTI: Guide Your Call Center Agents with Flows](#)

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[Reports and Dashboards: Lightning Experience Report Builder \(Generally Available\), Lightning Joined Reports \(Beta\), Subscription Improvements](#)

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[Analytics App Building: Conditional Formatting, Map Customization, Dashboard Pages](#)
[Analytics Data Integration: New Connectors, Scheduling Replication by Connection, Appending Rows in Recipes](#)

[Analytics Prebuilt Apps: Brand-New Analytics Templates, Account-Based Marketing for B2B Marketing Analytics](#)

[Display Einstein Discovery Recommendations on a Salesforce Object \(Generally Available\)](#)

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Community Builder

[Update Your Lightning Community to the Latest Template](#)

[Customer Service \(Napili\) Has a New Name](#)

[Update Your Community Look and Feel Quickly by Changing Themes](#)

[Improve Your Customer's Community Experience with Progressive Rendering](#)

[Build and Distribute Business Solutions Using Lightning Bolt Solutions](#)

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[Save Navigation and Tile Menu Changes as Draft](#)

[Display CMS Content in Your Community Using CMS Connect JSON \(Generally Available\)](#)

[Configure Named Credentials for CMS Connect JSON \(Generally Available\)](#)

[Get Better SEO for Better Content Discovery](#)

[Update Your <h1> Tag Overrides to <h3> for Topic Detail and Search Results Article Titles](#)

[Update Your <ui:button> Overrides for Some Lightning Community Components](#)

Community Builder Components

[Access Field Service Data in Lightning Communities](#)

[Recommend Actions and Offers to Community Members \(Pilot\)](#)

[Let Users View and Resume Paused Flows](#)

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[Get More Flexibility with Calendars in Communities](#)

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[Allow Community Users to Create Cases with the Contact Support Button](#)

[Easily Choose Topics, Customize the Upload Files Button Label, and More in the Case Deflection and Contact Support Form Components](#)

[Track Customer Concerns by Monitoring the Contact Support Subject Line](#)

[Let Customers Book Appointments from Your Community \(Beta\)](#)

[Do More with the Snap-Ins Chat Component](#)

[Hide the Connected Sources Tab on User Settings](#)

[Dependent Picklist to be Updated in Winter '19](#)

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[Optimize Account Roles to Improve Performance and Scale Your Org \(Generally Available\)](#)

[Make It Easy for Your Community Users to Log In with Identity Verification Methods Instead of Passwords](#)

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- Enable Users to Review and Manage Their Verification Methods
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- Set Different Login Policies for Salesforce and Community Users (Beta)
- Renamed Option for Verifying Community External Users' Identity
- Make Sure That Your Head Markup Is Valid

Sharing: Sharing Set Support for More Licenses (Beta), Improved Case Access (Beta)

- Use Sharing Sets with All Customer and Partner Licenses (Beta)
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Community Engagement

- Celebrate Community Members with Recognition Badges (Beta)
- Use Marketing Journeys to Reward Member Question-and-Answer Activity
- Use Posts at Scale to Reach Multiple Members at Once
- Enjoy the Look of Updated Engagement Queue Pages

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- Close a Conversation in Communities
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- Hide an Article's Topics
- Message Button Now Shown on Mobile Profiles
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- Let Delegated Admins Manage and Share Branding Assets (Beta)
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- Share Data with Channel Managers and Partner Users More Securely

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- Customize the Look of Libraries in Communities
- File Detail Pages Enhance Community Files
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[Assess a Customer's Mood on Support Calls with Community 360 \(Pilot\)](#)

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[Community Case Deflection Dashboard Removed From Community Management Package](#)

[Edit Self-Service User Permission Is Manage Customer Users](#)

[Secure Topics for Salesforce Sites and Portals \(Critical Update\)](#)

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[Include File Links in Weekly Data Export](#)

[Files Connect for SharePoint On-Premises Is Being Retired](#)

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Salesforce Authenticator

[Intelligently Save Trusted Locations with Einstein](#)

[Remove Trusted Locations with a New Method](#)

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- Customize Group Relationship Views
- Roll Up Opportunities to the Primary Group
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- Automate Rollup by Lookup Rule Recalculations Using Apex
- Enhance Productivity with Salesforce Inbox
- Get Smarter Marketing Automation with Salesforce Pardot
- Get Tellers Up and Running with the Teller Access Permission Set
- Associate an Activity to Multiple Contacts
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- Permission Set License Required for All Financial Services Cloud Users

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- Einstein Prediction Builder: Enjoy Custom AI Without Code (Beta)
- Einstein Next Best Action: Use Strategies to Recommend Actions and Offers (Pilot)

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- Create an External Service (Generally Available)
- Enjoy an Improved External Services User Interface
- Edit an External Service
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- Determine Which Data Privacy Record to Retain when Merging Records
- The Individual Object Supports Standard Object Features
- Make Users' Personal Data Unusable by Salesforce at Their Request

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- Process and Flow Design: More Ways to Use Lightning Components, Stages Generally Available, More Collection Assignment Operators
- Flow Distribution: Launching Flows as Subtabs, Displaying Recommended Flows
- Process and Flow Debugging: Debug Details at Runtime, Improved Error Emails, and More Log Lines
- Process and Flow Runtime: Better Errors for Users, More Ways to Avoid Errors and Rollbacks

Lightning App Builder

- Broken Components No Longer Break Lightning Pages
- Add Pinned Regions to Your Console Sidebars
- Show Earned Trailhead Badges with the Badges Lightning Component
- New Components for Email Application Panes

[Recommend Actions and Offers to Lightning Users \(Pilot\)](#)

[Deliver a CSRF-Protected Visualforce Page with a Lightning Component](#)

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[Track Time with the Time Field Type \(Generally Available\)](#)

[Show Einstein Predictions Where You Want Them \(Beta\)](#)

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[Use Triggers to Track Data Changes on External Objects with the OData 4.0 Adapter \(Beta\)](#)

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[Show Translated Custom Quick Action Success Messages Using the Translation Workbench](#)

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[Submit Marketing Resources in the Publishing Console](#)

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[Watch Videos \(English Only\)](#)

What's Different or Not Available in Summer '18 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.

 **Note:** To see the full list of feature gaps and limitations in Lightning Experience for the previous release, check out “What are the Gaps Between Lightning Experience and Salesforce Classic” in the Salesforce Help.

IN THIS SECTION:

[Sales Features: Lightning Experience Considerations](#)

[Productivity Features: Lightning Experience Considerations](#)

[Chatter Features: Lightning Experience Considerations](#)

Sales Features: Lightning Experience Considerations

Learn about the issue that your sales team can encounter in Lightning Experience.

Read Only Access for Certain Account Team Members

Users above the account owner in the role hierarchy can add team members to the account, but just with Read Only access. This limitation applies when those users also own child contacts for the same account.

Productivity Features: Lightning Experience Considerations

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

Activities: Events and Calendars Only

Dragging to Edit Events

Users can drag events and other records they've added to calendars to edit them on the Lightning Experience calendar. However, users can't drag a contact or lead onto the calendar to create a meeting with that person. Users also can't drag an all-day event to a time slot to add start and end times, and vice versa. Though users can see recurring events created in Salesforce Classic on the Lightning Experience calendar, they can't drag those events to edit them. No admin setup is required to turn on calendar dragging in Lightning Experience.

New Event Button Override

You can override the New Event button on the calendar with a customized action by creating a custom Lightning component. The Lightning component can only include standard Event fields, and isn't available for overriding the New Event button in the Salesforce app. When users click a timeslot on the calendar, users still see the standard event action.

Chatter Features: 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.

Topics

- You can assign topics to records, but there isn't a Records tab on the topic detail page. You can't use topics to filter your list views.

- Lightning Experience doesn't have a Setup page for topics on objects.

Essentials: Sales and Service for Small Business

Are you ready to take your small business to new heights? With Salesforce Lightning Essentials, you can easily manage your business' sales and service needs in one place. Grow lightning fast and help customers succeed with Sales and Service Lightning Essentials.

IN THIS SECTION:

[Sales Cloud Essentials: Improved Setup, More Users, and Custom Stages](#)

With the invite teammates and basic sales setup app, it's even easier to get started with Sales Cloud Lightning Essentials. And when your sales reps are ready to start selling, help them sell faster by choosing from a range of industry-specific sales stages that suit your business's needs.

[Service Essentials: Process and Flow Support, New Walkthrough](#)

Use flows and processes with Service Essentials. Plus, take a tour of the new Service Cloud Mobile app and learn how your support team can take their cases wherever they go.

Sales Cloud Essentials: Improved Setup, More Users, and Custom Stages

With the invite teammates and basic sales setup app, it's even easier to get started with Sales Cloud Lightning Essentials. And when your sales reps are ready to start selling, help them sell faster by choosing from a range of industry-specific sales stages that suit your business's needs.

IN THIS SECTION:

[Customize Salesforce with a New Setup App](#)

With an easy-to-follow progress bar, customizing and setting up Salesforce is simpler and faster than ever.

[Welcome Colleagues to Salesforce with Invite Teammates](#)

Add colleagues easily to Sales Cloud Lightning Essentials with Invite Teammates. Then, your entire company can get up and running in no time at all.

[Use Custom Sales Stages for Increased Productivity](#)

With custom stages, your sales reps get the information they need to close deals, secure investments, and finish projects faster.

[Eliminate Duplicate Records](#)

Help your reps keep on selling while Salesforce does the record keeping. Now, that Duplicate Management is available for Sales Cloud Lightning Essentials, you can keep your data clean automatically. By eliminating duplicate records, your teams can trust that sales data is up-to-date and your company can trust that your customer database is accurate.

Customize Salesforce with a New Setup App

With an easy-to-follow progress bar, customizing and setting up Salesforce is simpler and faster than ever.


Where: This change applies to Sales Cloud Lightning Essentials.

How: Access the Setup App from Lightning Essentials Home page. Click  and select **Basic Sales Setup**.

Welcome Colleagues to Salesforce with Invite Teammates

Add colleagues easily to Sales Cloud Lightning Essentials with Invite Teammates. Then, your entire company can get up and running in no time at all.

Where: This change applies to Sales Cloud Lightning Essentials.

How: From Lightning Essentials Home page, click , and then select **Basics Sales Setup**. Then click **Collaborate with Teammates** in Recommended Setup. Add your reps' information, and you're done!

Use Custom Sales Stages for Increased Productivity

With custom stages, your sales reps get the information they need to close deals, secure investments, and finish projects faster.

Where: This change applies to Sales Cloud Lightning Essentials.

How: Click , and select **Basic Sales Setup**. Click **Map Out Your Sales Path** in Recommended Setup.

Why: Custom stages give your reps just-in-time guidance to close deals fast or bring your next project to a successful completion. Select a template or create your own to give your customers a consistent sales experience and ensure reps have what they need to be successful.

Customize Your Stages

Stage Name	Stage Description	Status	Probability
New	You've converted that lead and set up your first meeting.	Open Won Lost	10%
Needs Analysis	After you've had a great first meeting, you've got requirem	Open Won Lost	20%
Proposal Creation	You're ready to finalize a proposal. Remember to update t	Open Won Lost	30%
Proposal Presentation	Get your customer to commit or ask for clarifications.	Open Won Lost	50%
Negotiation	Reach out to your legal team or draw up a standard contr	Open Won Lost	90%
Closed Won	That PO is approved and you've officially crushed it.	Open Won Lost	100%

Eliminate Duplicate Records

Help your reps keep on selling while Salesforce does the record keeping. Now, that Duplicate Management is available for Sales Cloud Lightning Essentials, you can keep your data clean automatically. By eliminating duplicate records, your teams can trust that sales data is up-to-date and your company can trust that your customer database is accurate.

Where: This change applies to Sales Cloud Lightning Essentials.

Why: Duplicate Management automatically merges duplicate contacts, accounts, and leads into a single record.

How: Duplicate Management is available to all sales reps on Sales Cloud Lightning Essentials with a standard set of matching rules. Then, reps are alerted when they create or edit a duplicate record. If you'd like, you can customize your rules to match your business needs.

SEE ALSO:

https://help.salesforce.com/articleView?id=managing_duplicates_overview.htm&type=5

Service Essentials: Process and Flow Support, New Walkthrough

Use flows and processes with Service Essentials. Plus, take a tour of the new Service Cloud Mobile app and learn how your support team can take their cases wherever they go.

IN THIS SECTION:

[Build Flows and Processes in Service Essentials](#)

Automate your service processes with up to five active flows and five active processes. Keep in mind that flows can integrate with other features, such as Apex and Communities, that aren't supported in Essentials.

[Get to Know Service Cloud Mobile with a New Walkthrough](#)

Take a tour of what Service Cloud Mobile has to offer in a walkthrough. Your team can take their cases with them on their Android and iOS mobile devices.

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Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements

We're giving you more out-of-the-box and custom AI features to help you get the most from the world's smartest CRM. Here are the newest ways that Einstein helps you predict what's going to happen next in your business and know what next steps to take.

Sales

[Einstein Forecasting: Improve Sales Predictions \(Generally Available\)](#)

Einstein Forecasting's ready for the big time! Improve your forecasting accuracy with predictions about your sales team's opportunities based on past data. In Lightning Experience, see key performance indicators (KPIs), helpful forecasting graphs, and up-to-date metrics that are refreshed multiple times a day. In Salesforce Classic, stay on top of your team's forecast predictions with reports.

[Einstein Opportunity Scoring: Create Reports Based on Opportunity Scores](#)

The Score field is now available when creating custom report types for opportunities. For example, create report types that bucket opportunities by score, weigh opportunities amounts, and show how orders affect the likelihood an opportunity will close.

[Einstein Automated Contacts: Review All Suggestions in One Place](#)

Sales reps can get a look at all the contacts and opportunity contact roles that Einstein suggests they add to Salesforce. New list views show what Einstein found and whether suggestions have been accepted, declined, or ignored. Reps can even take action directly from the list views.

[Einstein Activity Capture: Get Insights About Emails](#)

Emails that are associated with Salesforce records by Einstein Activity Capture now include insights, when available. Email Insights, which appear on the activity timeline and email details, give sales reps an advantage when communicating with customers through email. We also improved the activity timeline for Einstein Activity Capture users and given you more control over how data is collected and processed.

Einstein Insights: See Insights Without Connected Email

Reps can now see more account and opportunity insights without connecting an email account to Salesforce through Einstein Activity Capture. It's easier than ever for reps to stay on top of their deals with key insights, such as whether a competitor was mentioned or a key contact is leaving.

Optimize Your Lead Scoring Model by Ignoring Irrelevant Fields

If your business uses lead fields that don't affect lead quality, make your scoring model simpler, faster, and smarter by telling Einstein to ignore those fields. Some businesses use fields that don't affect a lead's chance of converting. For example, you might have a field that indicates the reason a lead didn't convert. When you tell Einstein to ignore those fields, you get more accurate lead scores.

Get More Guidance When Setting Up Einstein Lead Scoring

Now it's easier to understand which settings are right for your business. Each setup choice provides detailed information about the decisions you're asked to make.

View and Edit Analytics Apps with Sales Cloud Einstein

The Sales Cloud Einstein permission set license now includes the Edit Analytics Dataflows permission. With this permission, users can see the dataflow in Einstein Analytics apps, create and edit apps, or troubleshoot existing ones.

See Insights in Sandbox

Account and Opportunity Insights are available in sandbox environments, so you can see how easy it is to set up insights and what the insights look like to your sales teams.

Get Improved Opportunity Scores

The predictive model that's used to score opportunities is more robust than before. Einstein now uses relevant custom fields to analyze past opportunities and determine which opportunities are most likely to be won.

Service

Einstein Bots to the Rescue: Boost Service Team Productivity with Bots (Generally Available)

Make your service agents' lives easier with Einstein Bots. Bots can handle routine and repetitive customer requests, freeing your agents to spend their time on more complex issues that are better suited for humans. Does your customer just need an order status? A password reset? Store hours and location? No problem—Einstein Bots can do it in their sleep!

Analytics

Display Einstein Discovery Recommendations on a Salesforce Object (Generally Available)

Use the predictive power of Einstein Discovery to improve your everyday business decisions. With some configuration, Einstein Discovery can predict an outcome or recommend a course of action for a Salesforce object of your choice.

Expand Your Exploration Vocabulary with Improvements to Conversational Queries (Beta)

With only a common word or two, you can start a data query, and view answers in automatically configured charts. Conversational exploration is still beta, but you'll see significant enhancements that make it easier to use, including parsing complex sentences and no limit on the number of measures and groups.

Customization

Einstein Prediction Builder: Enjoy Custom AI Without Code (Beta)

Make your business processes smarter and more predictive with custom predictions on almost any standard or custom object in Salesforce. When the standard Einstein solutions don't fit what you're trying to predict, Einstein Prediction Builder lets you build your own predictive model. Best of all, you can build it in just a few clicks, without code.

Einstein Next Best Action: Use Strategies to Recommend Actions and Offers (Pilot)

Integrate business rules, predictive models, and data—both inside and outside of Salesforce—to deliver the right offer at the right moment to the right person. Perhaps you have offers that are relevant only under particular conditions, such as an upgrade or a discount. Or maybe there are multiple ways for service agents to assist customers, and you want to guide the agent to the most appropriate action. Take a look at Einstein Next Best Action.

Security and Identity

New Name for Event Monitoring Analytics App Setup

Other Einstein Analytics apps plan to integrate with Event Monitoring in the future, so we changed the option text in Setup to reflect that.

Development

Get Twice as Many Free Predictions

The free tier of service now includes 2,000 free predictions each calendar month (increased from 1,000 free predictions). You can use predictions interchangeably across Einstein Vision and Language.

Reset Your Einstein Platform Services Private Key

When you sign up for an Einstein account, you get a private key in the form of a .pem file. You use this key to generate an access token which is required to make API calls. But sometimes things happen. If you lose your private key, you can request a new one.

Use a Refresh Token to Generate an Access Token

You can use a refresh token instead of your private key to generate an access token. A refresh token is a JWT token that never expires. You can't use a refresh token to make an authenticated API call.

Einstein Vision: Deleting Image Datasets and Image Models

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

Einstein Language: Deleting Text Datasets and Text Models

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

SEE ALSO:

[Einstein for Marketing Cloud April 2018 Release Notes: Einstein Engagement Scoring Introduces Einstein Splits](#)

Sales: Intelligent Forecasting, Improved Campaign Management, and Lightning Dialer Enhancements

Get smarter with Einstein Forecasting, now generally available. Control access to campaign members, and add them by account. Improve your reps' performance with Lightning Dialer features and other tools.

IN THIS SECTION:

[Sales Cloud Einstein: Forecasting General Availability, More Reporting, and Improvements to Insights](#)

Improve your forecasting accuracy with Einstein Forecasting. Create reports based on opportunity scores, and get more control over how leads are scored. Plus, sales reps no longer have to connect their email account through Einstein Activity Capture to get Opportunity Insights. And there's more reasons to use Einstein Activity Capture now that we've added Email Insights.

[Core Sales Features: Improved Campaign Management, More Forecast Types, and Enhancements for Lead Conversion and Product Schedules](#)

Control access to campaign members, and add them by account. Forecast sales by product and schedule dates. Get improved support for Contacts to Multiple Accounts, and let sales reps add opportunities faster during lead conversion. And welcome product schedules to Lightning Experience.

[Productivity Features: Lightning Dialer Improvements, Email Insights, and More List Email Features](#)

We're introducing a ton of new features for Lightning Dialer, including call monitoring and multiple voicemail messages. Your reps can also now see important sales context alongside relevant emails, and send list emails to campaigns.

[Data Quality: Duplicate Management, Lightning Data](#)

Identify duplicate records by running duplicate jobs on custom objects. And with Lightning Data, benefit from usability improvements, higher match rates, more accurate status, and currency conversion.

[Lightning for Gmail: Focused Design and Email Logging Improvements](#)

Get your reps working faster with Salesforce records in Gmail™ and Google Calendar™. The application features and Salesforce data are organized to maximize space and give easier access. The improved log email experience makes it easier to log emails to Salesforce records.

[Microsoft® Integration: Focused Design, Email Logging Improvements, and Salesforce for Outlook Announcements](#)

Get your reps working their Salesforce deals directly from Microsoft® Outlook®. Lightning for Outlook provides reps with an updated product design and improvements when logging emails. If you're still using Salesforce for Outlook, check out the latest bug fixes. If you're not using Salesforce for Outlook regularly, starting next release, the product won't be available to download or use. But that's okay: Lightning for Outlook and Lightning Sync are available to you and offer improved Microsoft integration features.

[Salesforce CPQ and Billing](#)

Deliver quotes, proposals, and contracts quickly and accurately. Automate billing and payment processes with flexible tools and terms. Salesforce CPQ and Billing offer an end-to-end solution for creating quotes, closing deals, settling invoices, and reporting revenue.

[Pardot: Permanent Deletion of Prospects, Responsive Layouts, Preview As, Repeating Engagement Programs, and More Goodies](#)


Permanently delete prospects from the recycle bin, insert Salesforce files in Engage emails, use new prebuilt layouts to create responsive landing pages, and get better match rates when you use the Matched Leads component. Plus, preview emails as specific prospects and let prospects flow through engagement programs more than once.

[Other Changes in the Sales Cloud](#)

Filter account list views by territory in Lightning Experience. Event subjects display below event times in Calendar. And organizer, attendee, and attendee status fields are no longer exported with events.

Sales Cloud Einstein: Forecasting General Availability, More Reporting, and Improvements to Insights

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 **Note:** Some services and subscriptions include Sales Cloud Einstein for an extra cost. For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

[Einstein Forecasting: Improve Sales Predictions \(Generally Available\)](#)

Einstein Forecasting's ready for the big time! Improve your forecasting accuracy with predictions about your sales team's opportunities based on past data. In Lightning Experience, see key performance indicators (KPIs), helpful forecasting graphs, and up-to-date metrics that are refreshed multiple times a day. In Salesforce Classic, stay on top of your team's forecast predictions with reports.

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

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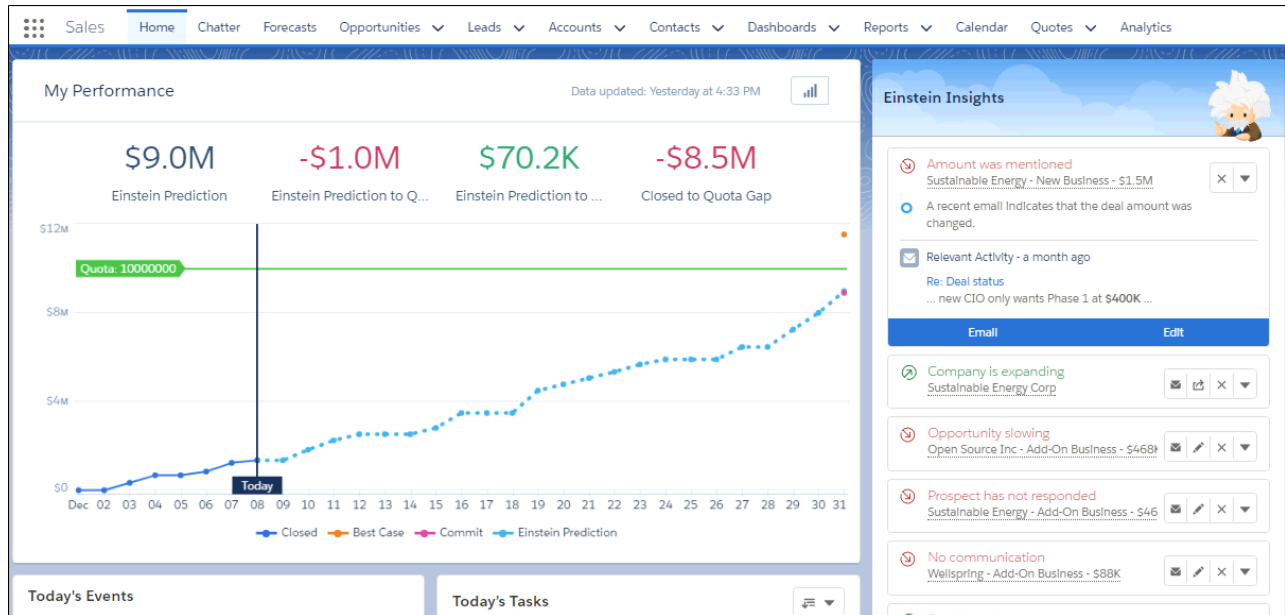
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Einstein Forecasting is available only for managers and is currently limited to orgs that forecast by month. Opportunity splits are not supported.

To use Einstein Forecasting, your org must have:

- Collaborative Forecasting enabled and forecast hierarchy set up
- Two years of opportunity history using the standard Opportunity object and the Amount and Close Date fields
- Forecasts set by month, not by quarter, using the Opportunities (Revenue) forecast type
- Standard fiscal year enabled, not custom fiscal year

Why: Einstein Forecasting uses data science and machine learning about your sales team's opportunities to improve your forecasting accuracy.



See a prediction graph that shows your team's past opportunities and predictions about future performance. The graph includes Einstein's prediction compared to your sales target, and comparisons based on your committed opportunities and best-case forecast. You can also see KPIs above the graph.

The screenshot displays the Salesforce Forecasts interface for user Elliot Johnson. The main table lists forecast data for March, April, and May 2018. A red box labeled '1' highlights the 'EINSTEIN PREDICTION' column. A second red box labeled '2' highlights the 'Einstein Prediction Details' panel on the right, which includes a range bar chart, a breakdown bar chart, and top factors.

MONTHS	EINSTEIN PREDICTION	QUOTA	CLOSED ONLY	COMMIT FORECAST	BEST CASE FORECAST
Total: 3 Months	-	\$11,700,000.00	\$4,668,860.00	\$8,420,703.42	\$14,300,000.00
March FY 2018	\$8,755,130.99	\$9,500,000.00	\$4,603,360.00	\$7,561,603.42	\$11,100,000.00
Bill West	\$3,898,562.00	\$3,000,000.00	\$3,475,259.00	\$3,475,259.00	\$3,900,000.00
Elliot East	\$1,210,415.00	\$2,000,000.00	\$410,600.00	\$780,000.00	\$1,800,000.00
Felix Reed	\$925,000.00	\$1,000,000.00	\$112,411.00	\$1,077,655.00	\$1,800,000.00
Gloria Barnes	\$730,000.00	\$2,400,000.00	\$236,063.00	\$488,063.00	\$540,000.00
Sue Marketing	\$1,712,023.00	\$1,000,000.00	\$369,027.00	\$1,239,027.00	\$2,100,000.00
My Opportunities	-	-	\$0.00	\$501,599.42	\$900,000.00
April FY 2018	\$814,502.33	\$900,000.00	\$0.00	\$408,100.00	\$1,100,000.00
May FY 2018	\$1,202,746.52	\$1,300,000.00	\$65,500.00	\$451,000.00	\$2,000,000.00

Einstein Prediction Details: March FY 2018 - Elliot Johnson Team

RANGE

Range: ± 10% (\$875,513.10)

BREAKDOWN

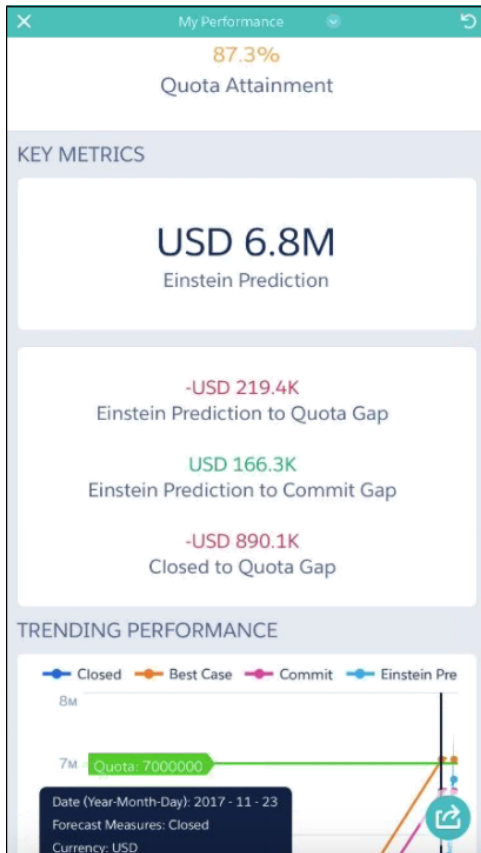
Category	Amount
Closed Won	\$4.6M
Wins from Existing Deals	\$2.2M
Wins from New Deals	\$2.2M
Total Prediction	\$8.8M

TOP FACTORS

- The teams in your organization are performing better than the same day last quarter.
- Your team won more deals than the same day last...

On the forecasts page, the Einstein Prediction field (1) shows the median predicted amount for each team and team member. Predictions are based on all open opportunities with close dates by the end of the month. Sometimes a prediction isn't shown, such as when sufficient historical data isn't available or the prediction range is too large to be useful. You can also see more details about each prediction (2), such as the range of the prediction value and contributing factors.

Predictions are always in US dollars, unless you're using multiple currencies. In that case, the amounts are converted to the currency selected by the user, using the static conversion rate you've set.



You can also access Einstein Forecasting from your mobile device using the Analytics app. See key performance metrics and a prediction graph while you're on the go.

How: To get started, enable the feature from the Einstein Forecasting page in Setup. If you've customized your org's Home page, add the performance chart to the Home page manually.

SEE ALSO:

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)
[Enable Einstein Forecasting](#)

Einstein Opportunity Scoring: Create Reports Based on Opportunity Scores

The Score field is now available when creating custom report types for opportunities. For example, create report types that bucket opportunities by score, weigh opportunities amounts, and show how orders affect the likelihood an opportunity will close.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

How: To get started, create a custom report type with opportunities as the primary object and opportunity score as the secondary object. Then add additional criteria to focus on the data you need.

SEE ALSO:

[Salesforce Help: Create Custom Report Types for Einstein Opportunity Scoring \(can be outdated or unavailable during release preview\)](#)
[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Einstein Lead Scoring: Irrelevant Fields Ignored During Analysis and Clearer Setup

Tell Einstein to ignore unhelpful fields during lead score analysis and get clear guidance in setup.

IN THIS SECTION:

[Optimize Your Lead Scoring Model by Ignoring Irrelevant Fields](#)

If your business uses lead fields that don't affect lead quality, make your scoring model simpler, faster, and smarter by telling Einstein to ignore those fields. Some businesses use fields that don't affect a lead's chance of converting. For example, you might have a field that indicates the reason a lead didn't convert. When you tell Einstein to ignore those fields, you get more accurate lead scores.

[Get More Guidance When Setting Up Einstein Lead Scoring](#)

Now it's easier to understand which settings are right for your business. Each setup choice provides detailed information about the decisions you're asked to make.

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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

How: During setup, tell Einstein that you don't want to include all fields in the analysis (1), and then deselect the fields that you want to ignore (2).

Should Einstein consider all lead fields?

Do you want Einstein to consider all lead fields?

Yes, use all lead fields
(Recommended)

No, ignore certain lead fields
(Advanced) **1**

Be careful about ignoring fields

Ignore fields only if you are sure they have no effect on a lead's chances of converting.
Mistakenly ignoring influential fields makes lead scores less accurate.

Should I tell Einstein to ignore any fields?
(Advanced)

Some businesses use fields that don't affect the lead's chance of converting. For example, you might have a field that isn't used until after a lead converts.

Telling Einstein to ignore those fields yields more accurate lead scores

Before ignoring a field, make sure the field doesn't affect the lead's chance of converting. Ignoring fields that do affect lead quality decreases the accuracy of your lead scores.

If you're not sure about whether to ignore a particular field, contact Salesforce Support.

[Learn More](#)

Back Next

Should Einstein consider all lead fields?

Deselect fields to ignore during score analysis

Field: Show: All Fields

FIELD LABEL	FIELD NAME	DATA TYPE	TYPE
<input checked="" type="checkbox"/>	Address	Address	textarea
<input checked="" type="checkbox"/>	Annual Revenue	AnnualRevenue	currency
<input checked="" type="checkbox"/>	Company	Company	string
<input checked="" type="checkbox"/>	Company	Teafwe_fw4t_c	double
<input checked="" type="checkbox"/>	Created By	CreatedById	reference
<input checked="" type="checkbox"/>	Data.com Key	Jigsaw	string
<input checked="" type="checkbox"/>	Description	Description	textarea
<input checked="" type="checkbox"/>	Do Not Call	DoNotCall	boolean
<input checked="" type="checkbox"/>	Email	Email	email
<input checked="" type="checkbox"/>	Email Opt Out	HasOptedOutOFE...	boolean
<input checked="" type="checkbox"/>	Fax	Fax	phone
<input checked="" type="checkbox"/>	Fax Opt Out	HasOptedOutOFax	boolean

Ignored Fields

Should I tell Einstein to ignore any fields? (Advanced)

Some businesses use fields that don't affect the lead's chance of converting. For example, you might have a field that isn't used until after a lead converts.

Telling Einstein to ignore those fields yields more accurate lead scores.

Before ignoring a field, make sure the field doesn't affect the lead's chance of converting. Ignoring fields that do affect lead quality decreases the accuracy of your lead scores.

If you're not sure about whether to ignore a particular field, contact Salesforce Support.

[Learn More](#)

Back **2** Next

Warning: Before ignoring a field, make sure that the field doesn't affect the lead's chance of converting. Ignoring fields that do affect lead quality decreases the accuracy of your lead scores. If you're not sure about whether to ignore a particular field, contact Salesforce Customer Support. We recommend that you include all standard fields in Einstein's analysis.

SEE ALSO:

[Salesforce Help: Enable Einstein Lead Scoring \(can be outdated or unavailable during release preview\)](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Get More Guidance When Setting Up Einstein Lead Scoring

Now it's easier to understand which settings are right for your business. Each setup choice provides detailed information about the decisions you're asked to make.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Why: Now it's clear which steps are coming (1), along with information to help you complete each step (2). You can click the Learn More link on each screen to get even more details.

Einstein Lead Scoring

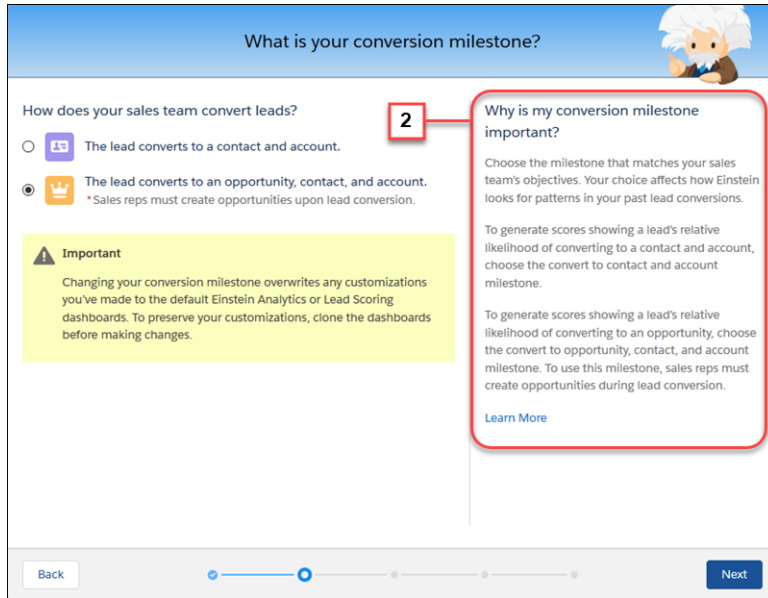
1

On the next screens, we'll ask:

- 1. Which conversion milestone constitutes success for your company?**
Tell Einstein whether you convert leads simply to accounts and contacts, or also to opportunities.
- 2. Should Einstein consider all lead fields? (Advanced)**
In most cases, it's best to have Einstein consider all lead fields. There are some kinds of fields you might choose to have Einstein ignore.

Why does Einstein need this information?
[Learn More](#)

Setup Now



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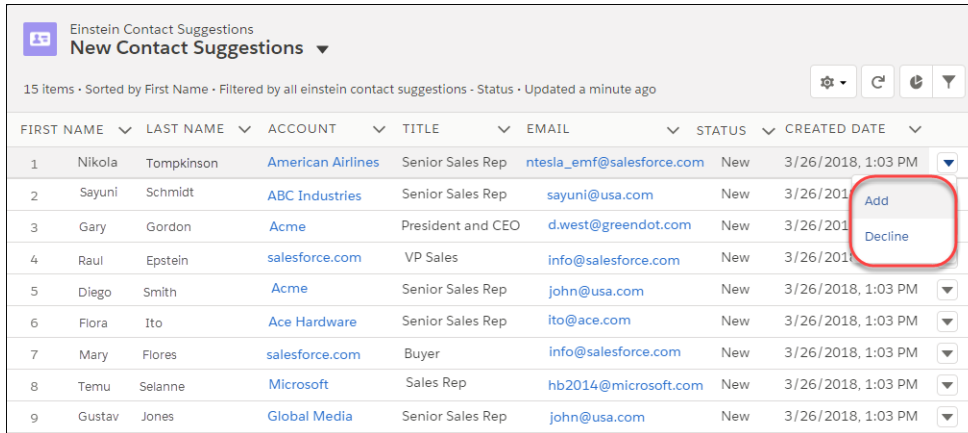
Einstein Automated Contacts: Review All Suggestions in One Place

Sales reps can get a look at all the contacts and opportunity contact roles that Einstein suggests they add to Salesforce. New list views show what Einstein found and whether suggestions have been accepted, declined, or ignored. Reps can even take action directly from the list views.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

Why: By seeing a complete list of what Einstein suggested and what action, if any, has been taken, you and your sales reps get more transparency into how Einstein Automated Contacts is impacting your data. Plus, see which sales reps are making the most use of this time-saving feature. And, because reps can add and decline suggestions from the list views, getting the most up-to-date data is easier than ever.

How: From the App Launcher, select the **Einstein Contact Suggestions** or **Einstein Opportunity Contact Role Suggestions** item. Review the suggestions to see what's been added to Salesforce and what's been declined. Use the row-level actions to add or decline suggestions with the New status.



	FIRST NAME	LAST NAME	ACCOUNT	TITLE	EMAIL	STATUS	CREATED DATE
1	Nikola	Tompkinson	American Airlines	Senior Sales Rep	ntesla_emf@salesforce.com	New	3/26/2018, 1:03 PM
2	Sayuni	Schmidt	ABC Industries	Senior Sales Rep	sayuni@usa.com	New	3/26/2018, 1:03 PM
3	Gary	Gordon	Acme	President and CEO	d.west@greendot.com	New	3/26/2018, 1:03 PM
4	Raul	Epstein	salesforce.com	VP Sales	info@salesforce.com	New	3/26/2018, 1:03 PM
5	Diego	Smith	Acme	Senior Sales Rep	john@usa.com	New	3/26/2018, 1:03 PM
6	Flora	Ito	Ace Hardware	Senior Sales Rep	ito@ace.com	New	3/26/2018, 1:03 PM
7	Mary	Flores	salesforce.com	Buyer	info@salesforce.com	New	3/26/2018, 1:03 PM
8	Temu	Selanne	Microsoft	Sales Rep	hb2014@microsoft.com	New	3/26/2018, 1:03 PM
9	Gustav	Jones	Global Media	Senior Sales Rep	john@usa.com	New	3/26/2018, 1:03 PM

SEE ALSO:

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Einstein Activity Capture: Get Insights About Emails

Emails that are associated with Salesforce records by Einstein Activity Capture now include insights, when available. Email Insights, which appear on the activity timeline and email details, give sales reps an advantage when communicating with customers through email. We also improved the activity timeline for Einstein Activity Capture users and given you more control over how data is collected and processed.

Where: This change applies to Lightning Experience in Professional, Performance, and Unlimited editions.

How: If you use Einstein Activity Capture through a Sales Cloud Einstein or Inbox license, Email Insights is turned on by default.

SEE ALSO:

[Get Smarter About Email with Email Insights in the Activity Timeline](#)

[Access All Activity History in Einstein Activity Capture](#)

[Manage Data Policies](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Einstein Insights: See Insights Without Connected Email

Reps can now see more account and opportunity insights without connecting an email account to Salesforce through Einstein Activity Capture. It's easier than ever for reps to stay on top of their deals with key insights, such as whether a competitor was mentioned or a key contact is leaving.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

Why: Most insights previously required a connected email account in order to appear for sales reps. Reps can now see all account insights and several opportunity insights without using Einstein Activity Capture.

Other Changes in Sales Cloud Einstein

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

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Account and Opportunity Insights are available in sandbox environments, so you can see how easy it is to set up insights and what the insights look like to your sales teams.

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The predictive model that's used to score opportunities is more robust than before. Einstein now uses relevant custom fields to analyze past opportunities and determine which opportunities are most likely to be won.

View and Edit Analytics Apps with Sales Cloud Einstein

The Sales Cloud Einstein permission set license now includes the Edit Analytics Dataflows permission. With this permission, users can see the dataflow in Einstein Analytics apps, create and edit apps, or troubleshoot existing ones.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited Editions.

How: To view or edit dataflows, in Analytics, click the gear icon (), click **Data Manager**, then click the **Dataflows and Recipes** tab.

SEE ALSO:

[Salesforce Help: Configure the Dataflow with the Dataflow Editor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

See Insights in Sandbox

Account and Opportunity Insights are available in sandbox environments, so you can see how easy it is to set up insights and what the insights look like to your sales teams.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: Use the Einstein Readiness Assessor to check whether your org meets the data requirements to generate insights. Insights in sandbox environments refresh only if the sandbox data is refreshed. Because the data in sandbox environments can be incomplete, don't evaluate the accuracy of insights based on what you see in sandbox.

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The predictive model that's used to score opportunities is more robust than before. Einstein now uses relevant custom fields to analyze past opportunities and determine which opportunities are most likely to be won.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

How: A better predictive model means a smarter Einstein. So sit back and enjoy the improved opportunity scores.

SEE ALSO:

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[Salesforce Help: Understand How Einstein Scores Your Opportunities \(can be outdated or unavailable during release preview\)](#)

Core Sales Features: Improved Campaign Management, More Forecast Types, and Enhancements for Lead Conversion and Product Schedules

Control access to campaign members, and add them by account. Forecast sales by product and schedule dates. Get improved support for Contacts to Multiple Accounts, and let sales reps add opportunities faster during lead conversion. And welcome product schedules to Lightning Experience.

IN THIS SECTION:

[Campaigns: Sharing Members, Account-Based Marketing, and Other Enhancements](#)

Control access to campaign members, and add members by account. You can also send list emails to campaign members, get faster access to campaign hierarchies, and view marketing asset engagement.

[Collaborative Forecasts: More Detailed Forecasts and Forecasting Options](#)

You can now base opportunity revenue and quantity forecasts on schedule and product dates. You can also show product family totals in the opportunity list on the forecasts page.

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With product schedules fully available in Lightning Experience, reps can now do it all in one place. Establish, update, and delete revenue and quantity schedules on opportunities without leaving Lightning Experience. If you've been waiting on product schedules to switch users to Lightning Experience, the time has arrived.

[Accounts: Person Account Setup, Custom Quick Actions, and New Package Validation Available in Lightning Experience](#)

Person Accounts are easier to use in Lightning Experience. You can configure page layouts and custom quick actions for person accounts in one place. Plus, our new package validation makes sure active person and business account records can't be removed inadvertently.

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Path is all about making your team's processes run more smoothly. Help your reps build stronger relationships with their contacts by setting up a Path. Plus, your reps can travel a Path more easily by updating dependent picklists without having to break their stride.

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Now, add and view contact roles for opportunities from the Salesforce mobile app.

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Control access to campaign members, and add members by account. You can also send list emails to campaign members, get faster access to campaign hierarchies, and view marketing asset engagement.

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[Control Who Can Access Campaign Members](#)

Keep lead and contact details private even when they're added to campaigns. Let your marketing department see only the campaign member details that you want them to. Sharing rules for campaign members can inherit from lead and contact rules or from the campaign.

[Add All Contacts from an Account to Campaigns](#)

Marketing users can focus on accounts when adding members to campaigns. Users can search for contacts by account and add some or all contacts to a campaign.

[Send List Emails to Campaign Members](#)

Marketing users can save time and effort by sending list emails directly to members of a campaign. The list email appears on the activity timeline for the recipient and the recipient's account, if Roll up activities to a contact's primary account is enabled.

[Filter Lead and Contact List Views by Campaign](#)

Marketing users can find all leads or contacts associated with a campaign without leaving the Leads or Contacts tab..

[View Campaign Hierarchies Faster](#)

Quickly see how a campaign fits into your marketing strategy and results. Your marketing users can now jump from campaign detail pages to the hierarchy view of the campaign with one click. Use a campaign hierarchy to group campaigns together within a specific marketing program or initiative, helping you analyze related marketing efforts and their results more efficiently.

[View Pardot Marketing Asset Engagement in Salesforce \(Beta\)](#)

When your marketing team connects their Pardot and Salesforce campaigns, they can monitor how prospects are engaging with the campaign's marketing assets. Marketers can see engagement data for an entire asset type, all assets related to a campaign, or an individual asset.

Control Who Can Access Campaign Members

Keep lead and contact details private even when they're added to campaigns. Let your marketing department see only the campaign member details that you want them to. Sharing rules for campaign members can inherit from lead and contact rules or from the campaign.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To let users see only the campaign members whose lead or contact records they have access to, in Sharing Settings choose **Controlled by Lead or Contact**. To let users who have access to a campaign see campaign member details, choose **Controlled by Campaign**.

Access provided by a user's role or profile supersedes the organization-wide defaults.

SEE ALSO:

[Salesforce Help: Set Your Organization-Wide Sharing Defaults](#)

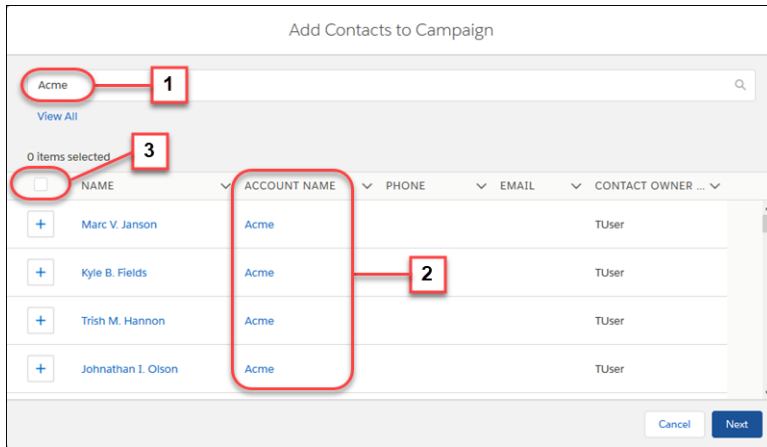
Add All Contacts from an Account to Campaigns

Marketing users can focus on accounts when adding members to campaigns. Users can search for contacts by account and add some or all contacts to a campaign.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Let's say your company sells to restaurants. If your marketing users are working on a campaign to sell more bread, they might want to target only the accounts that aren't yet buying bread. Now they can quickly search for accounts and add their contacts to the campaign.

How: From the Campaign Members related list on a campaign, click **Add Contacts**. Search for an account name (1). The list of contacts for that account appears (2). Then select some or all (3) contacts to add to the campaign.



Send List Emails to Campaign Members

Marketing users can save time and effort by sending list emails directly to members of a campaign. The list email appears on the activity timeline for the recipient and the recipient's account, if Roll up activities to a contact's primary account is enabled.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: From the Campaign Members related list on a campaign or any contact or lead list view filtered by campaign, click **Send List Email**.

SEE ALSO:

[Send List Emails to Campaigns and Campaign Members](#)

[Salesforce Help: Enable Roll Up of Activities to a Contact's Primary Account](#)

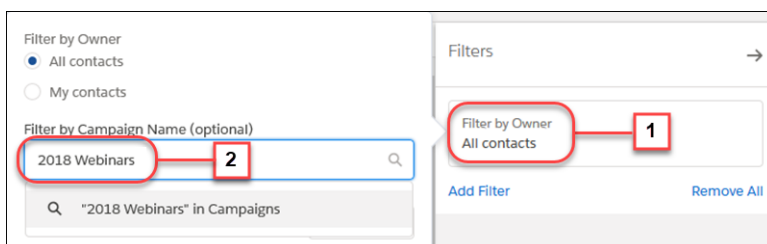
[Idea Exchange: Mass Email All Campaign Members from the Campaign view](#)

Filter Lead and Contact List Views by Campaign

Marketing users can find all leads or contacts associated with a campaign without leaving the Leads or Contacts tab..

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When creating a lead or contact list view, click **Filter by Owner** (1) and then add the campaign name (2).



SEE ALSO:

[Filter by Campaign to Send Precise List Emails](#)

[Idea Exchange: Lightning Experience - Lead and Contact List View - Campaign filter](#)

View Campaign Hierarchies Faster

Quickly see how a campaign fits into your marketing strategy and results. Your marketing users can now jump from campaign detail pages to the hierarchy view of the campaign with one click. Use a campaign hierarchy to group campaigns together within a specific marketing program or initiative, helping you analyze related marketing efforts and their results more efficiently.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: On campaign detail pages, click **View Campaign Hierarchy** ()

 **Note:** The **View Campaign Hierarchy** button doesn't work in communities.

SEE ALSO:


[Salesforce Help: View Campaign Hierarchies](#)

[Salesforce Help: View Campaign Hierarchy Statistics](#)

[Salesforce Help: Set Up Campaign Hierarchies](#)

View Pardot Marketing Asset Engagement in Salesforce (Beta)

When your marketing team connects their Pardot and Salesforce campaigns, they can monitor how prospects are engaging with the campaign's marketing assets. Marketers can see engagement data for an entire asset type, all assets related to a campaign, or an individual asset.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the "Services" under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer's use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.

To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only, doesn't affect your Salesforce license usage, and can't access or update data by default. If you choose to opt in to the new Pardot features available in Sales Cloud, this user enables Engagement History data and other campaign data to flow between your Pardot org and your Salesforce org. This flow can include copying records from Pardot to Salesforce and vice versa.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Performance, and Unlimited editions with Pardot Standard, Pro, Ultimate, Growth, Plus, or Advanced Edition.

When: These changes are available on June 11, 2018.

Who: To access Engagement History data, users need the Sales User or CRM User standard permission set.

Why: When Connected Campaigns is enabled, marketing users can see how their campaign members are engaging with these marketing asset types.

- List emails, including emails sent from Pardot
- Marketing forms, including both forms and form handlers in Pardot
- Marketing links, including files and custom redirects in Pardot
- Landing pages

Engagement details are available in several places.

- Object home page for each asset type—See all assets of a given type, along with aggregate engagement data for those assets.
- Asset record detail pages—View which leads and contacts engaged and when, errors generated, and other details. Each page has its own Chatter feed and a quick action to navigate to the editable asset details in Pardot.
- Related lists for each asset type on campaign detail pages, including engagement data for each asset.
- Engagement fields on the Engagement Metrics component available for campaign detail pages in Lightning Experience.

On campaign detail pages, you can include the engagement metrics fields that make sense for your business. These fields are available.

- **List emails, including emails sent from Pardot:**

- Unique Email Opens in Campaign
- Unique Email Opens in Hierarchy
- Unique Email Clicks in Campaign
- Unique Email Clicks in Hierarchy
- Total Emails Delivered in Campaign
- Total Emails Delivered in Hierarchy

- **Forms and form handlers:**

- Total Form Submissions in Campaign
- Total Form Submissions in Hierarchy
- Total Form Views in Campaign
- Total Form Views in Hierarchy

- **Custom redirects and marketing links:**

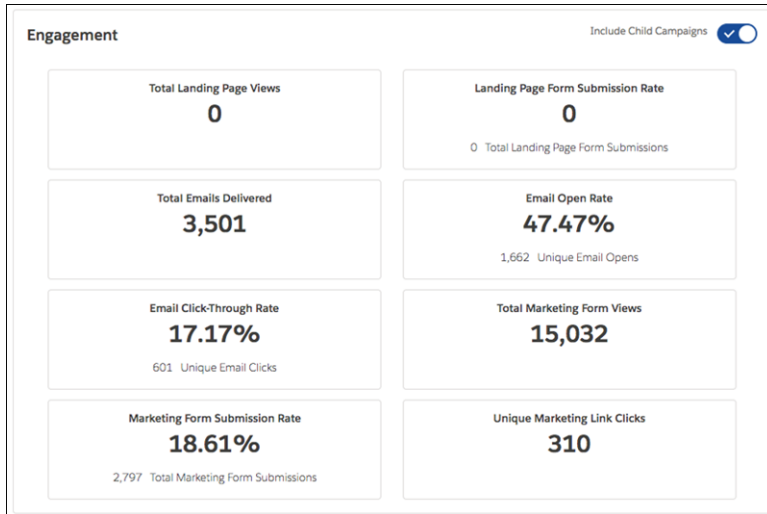
- Unique Marketing Link Clicks in Campaign
- Unique Marketing Link Clicks in Hierarchy

- **Landing Pages**

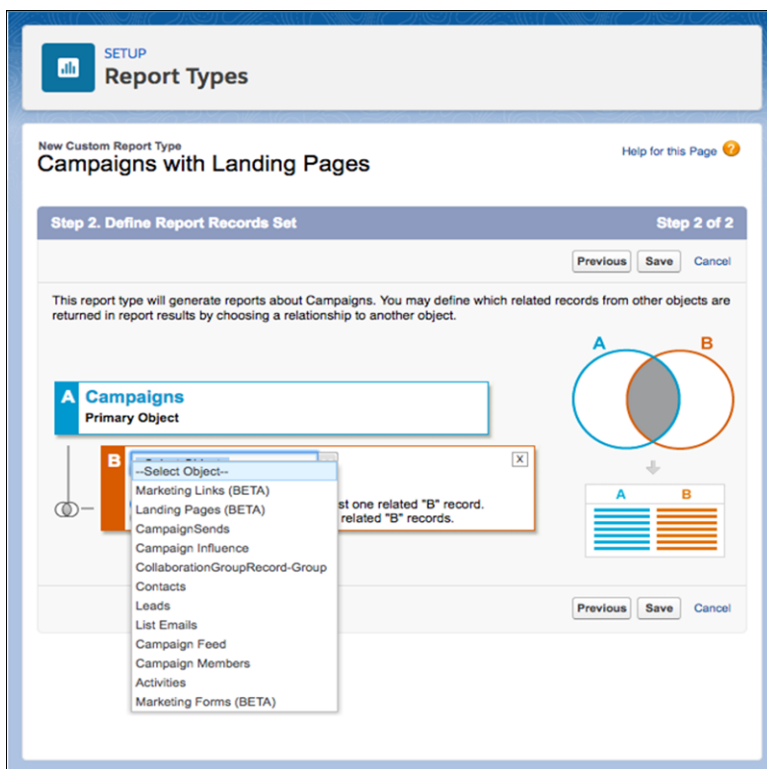
- Total Landing Page Views in Campaign
- Total Landing Page Submissions in Campaign
- Total Landing Page Views in Hierarchy
- Total Landing Page Submissions in Hierarchy

In Lightning Experience, you can add the Engagement Metrics component to campaigns to see the metrics that your marketing team needs. The component can show the values for just the campaign or the campaign hierarchy. You can customize the component to display any combination of these fields.

- Email Open Rate
- Email Click-Through Rate
- Total Emails Delivered
- Marketing Form Submission Rate
- Total Marketing Form Views
- Unique Marketing Link Clicks
- Total Landing Page Views
- Landing Page Form Submission Rate



To show your marketing team more details of campaign performance, you can create custom report types for marketing asset engagement. For example, to create a report of campaigns with landing pages, choose **Campaigns** as the primary object and **Landing Pages** as the secondary object.



Because each marketing asset type is a standard object in Salesforce, marketing users can easily find assets with global search.

How: Depending on the engagement information your marketing users need, add the data in these places.

- Add engagement metrics fields to marketing asset page layouts.
- Add engagement metrics fields to marketing asset list views.
- Add the asset type related lists to campaign page layouts.
- Add marketing asset engagement metrics fields to campaign page layouts.

- Add the Engagement Metrics component to campaign page layouts and include the fields your users need.
- Create custom report types for marketing assets or campaigns with marketing assets.

Collaborative Forecasts: More Detailed Forecasts and Forecasting Options

You can now base opportunity revenue and quantity forecasts on schedule and product dates. You can also show product family totals in the opportunity list on the forecasts page.

IN THIS SECTION:

[Predict Sales More Accurately with Schedule and Product Date Forecasts in Lightning Experience](#)

Let your sales team forecast opportunity revenue and quantity based on schedule and product dates. Forecasting by schedule or product date can provide a more accurate view of expected sales than forecasting by opportunity close date.

[Show Product Family Totals in the Opportunity List](#)

If your sales team forecasts on product families, give your reps a clearer view of where their product family forecast amounts come from. In the opportunity list on the forecasts page, show the product family totals—not just the overall opportunity totals—that roll up into product family forecast amounts.

Predict Sales More Accurately with Schedule and Product Date Forecasts in Lightning Experience

Let your sales team forecast opportunity revenue and quantity based on schedule and product dates. Forecasting by schedule or product date can provide a more accurate view of expected sales than forecasting by opportunity close date.

Where: This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: When you forecast by schedule date, Salesforce uses the values from a product schedule's Date and Revenue or Quantity fields to calculate forecast amounts. If a schedule isn't available for an opportunity product, Salesforce uses the product's Date and Total Price or Quantity fields.

Here's an example.

A \$12,000 opportunity has a close date of June 30, 2018, with \$1,000 revenue scheduled monthly.

- If you forecast by close date, forecasts for the month of June include \$12,000 for the opportunity.
- If you forecast by schedule date, forecasts for the month of June include \$1,000 for the opportunity.

When you forecast by product date, Salesforce uses the values from each opportunity product's Date and Total Price or Quantity fields to calculate forecast amounts. If a date isn't available for a product, Salesforce uses the opportunity's Close Date and Amount or Quantity fields.

Here's an example.

A \$10,000 opportunity has a close date of June 30, 2018 and two products: laptops for \$4,000 and desktops for \$6,000. The \$4,000 product date is June 30, 2018. The \$6,000 product date is May 31, 2018.

- If you forecast by close date, forecasts for the month of May don't include an amount for this opportunity. Forecasts for the month of June include \$10,000 for this opportunity.
- If you forecast by product date, forecasts for the month of May include \$6,000 for this opportunity. Forecasts for the month of June include \$4,000 for this opportunity.

When you forecast by schedule or product date, the Forecasted Amount column in the opportunity list shows the amounts that contribute to forecasts, not the overall opportunity amounts.

OPPORTUNITY NAME	ACCOUNT NAME	FORECASTED AMOUNT
Amptech Corporation...	Amptech Corporation	3,000.00
General Utilities - Ne...	General Utilities	6,000.00
Plasmosis, Inc. - New ...	Plasmosis, Inc.	15,000.00
Missoula & Sons Inc. - ...	Missoula & Sons Inc.	25,000.00
Datanet, Inc. - New B...	Datanet, Inc.	13,000.00
Datanet, Inc. - Add-O...	Datanet, Inc.	12,000.00

And a bonus: When you forecast by schedule or product date, custom report types with Forecasting Items as the primary object show the schedule-date and product-date forecast values.

How: To forecast by schedule date, make sure that you've enabled product schedules and set them up to reflect expected sales. To forecast by product date, make sure that you've defined product dates to reflect expected sales.

SETUP
Forecasts Settings

Select a Forecast Type

Select a forecast type to enable for users. Your Salesforce configurations determine which forecast types are available. No two configurations can have the same forecast type and measurement.

Forecast Type:

Select a Forecast Measurement

The forecast type determines the forecast measurement you can use. Quantity forecasts aren't available for opportunity revenue splits or opportunity overlay splits.

Revenue Quantity

Select a Forecast Date Type

For the opportunity revenue and quantity forecast types, you can specify the values that forecasts are based on. To use the opportunity close date and amount or quantity, select **Close date**. To use dates and total prices or quantities in opportunity products, select **Product date**. To use dates and revenue amounts or quantities from product schedules, select **Schedule date**.

Close date Product date Schedule date

On the Forecasts Settings page in Setup, add the opportunity revenue or quantity forecast type, and then select **Schedule date** or **Product date** as the forecast date type.

If you add a schedule or product date forecast type, the Forecasted Amount column is included in the opportunity list for that type.

Selected Columns
Opportunity Name
Account Name
Forecasted Amount
Close Date
Stage
Probability (%)
Forecast Category
Owner Full Name

SEE ALSO:

[Salesforce Help: Choose the Date Type for Opportunity Revenue and Quantity Forecasts \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Forecast Based on Revenue/Quantity Schedule Date](#)

Show Product Family Totals in the Opportunity List

If your sales team forecasts on product families, give your reps a clearer view of where their product family forecast amounts come from. In the opportunity list on the forecasts page, show the product family totals—not just the overall opportunity totals—that roll up into product family forecast amounts.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: Let's say that an opportunity's total amount is \$10,000. But the total of the opportunity's products in the Hardware family is only \$3,000. The Forecasted Amount column in the opportunity list shows \$3,000, which gives your sales team a more accurate prediction of revenue from the Hardware product family.

OPPORTUNITY NAME	ACCOUNT NAME	FORECASTED AMOUNT
Amptech Corporation...	Amptech Corporation	3,000.00
General Utilities - Ne...	General Utilities	6,000.00
Plasmosis, Inc. - New ...	Plasmosis, Inc.	15,000.00
Missoula & Sons Inc. - ...	Missoula & Sons Inc.	25,000.00
Datanet, Inc. - New B...	Datanet, Inc.	13,000.00
Datanet, Inc. - Add-O...	Datanet, Inc.	12,000.00

How: If your Salesforce org is created in Summer '18 or later, the Forecasted Amount column is included in the opportunity list. If your org was created before Summer '18, we recommend adding the Forecasted Amount column to the opportunity list.

Selected Columns
Opportunity Name
Account Name
Forecasted Amount
Close Date
Stage
Probability (%)
Forecast Category
Owner Full Name

SEE ALSO:

[Salesforce Help: Display Fields in the Opportunity List in Collaborative Forecasts](#)

Leads: Converting with Contacts to Multiple Accounts and Secure Control of Lead Merge

Experience faster lead conversion with improved support for the Contacts to Multiple Accounts feature. Let sales reps add opportunities faster during lead conversion. And have more control over who can merge and delete leads.

IN THIS SECTION:

[Convert Leads with Contacts to Multiple Accounts and Other Conversion Enhancements](#)

If your business uses Contacts to Multiple Accounts, when sales reps convert a lead to an existing contact, they can now associate the contact with a new or existing account. Sales reps can now expand the Opportunity section of the Convert Lead window by clicking the opportunity name. In Setup, the option Select Don't Create an Opportunity by Default in Convert Lead Window now works in Salesforce Classic.

[Control Who Can Merge Leads More Securely](#)

A new Lead setting and changes to organization-wide defaults improve your control over who can merge and delete leads. The Public Read/Write/Transfer organization-wide default now only allows users to merge and delete leads if your org also has the Org-Wide Merge and Delete setting.

Convert Leads with Contacts to Multiple Accounts and Other Conversion Enhancements

If your business uses Contacts to Multiple Accounts, when sales reps convert a lead to an existing contact, they can now associate the contact with a new or existing account. Sales reps can now expand the Opportunity section of the Convert Lead window by clicking the opportunity name. In Setup, the option Select Don't Create an Opportunity by Default in Convert Lead Window now works in Salesforce Classic.

Where: Some changes apply only to Lightning Experience, and some apply to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

- Updated support for Contacts to Multiple Accounts during lead conversion applies to Lightning Experience only.
- Expanding the Opportunity section of the Convert Lead window by clicking the opportunity name applies to Lightning Experience only.
- In Setup, the option Select Don't Create an Opportunity by Default in Convert Lead Window is available in both Lightning Experience, Salesforce Classic.

How: Some changes appear automatically and some require user action.

- Support for Contacts to Multiple Accounts during lead conversion appears automatically.
- To expand the Opportunity section of the Convert Lead window, sales reps can click the opportunity name.
- In Setup, enter *Lead Settings* in the Quick Find box and then click **Lead Settings**. Select the option **Select "Don't create an opportunity" by Default in Convert Lead Window**.

Control Who Can Merge Leads More Securely

A new Lead setting and changes to organization-wide defaults improve your control over who can merge and delete leads. The Public Read/Write/Transfer organization-wide default now only allows users to merge and delete leads if your org also has the Org-Wide Merge and Delete setting.

Where: These changes apply to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: This new setting is enabled by default for existing orgs because they could have relied on the previous behavior. The new setting is disabled by default for new orgs created in Summer '18 and later.

Products: Work with Schedules in Lightning Experience

With product schedules fully available in Lightning Experience, reps can now do it all in one place. Establish, update, and delete revenue and quantity schedules on opportunities without leaving Lightning Experience. If you've been waiting on product schedules to switch users to Lightning Experience, the time has arrived.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, Performance, and Developer editions.

How: This change is available to all users in orgs that have enabled Product Schedules. To turn on or configure product schedules, search for **Product Schedules** in Setup.

The screenshot displays the 'Edit Meal Plan- Veggie Plan (3 Months)' dialog box in Salesforce Lightning Experience. The dialog is overlaid on a product detail page. The dialog contains the following fields and options:

- Product Name:** Meal Plan- Veggie Plan (3 Months)
- Product Family:** None
- Product Code:** 452N
- Active:**
- Product Description:** Vegetarian recipes with plant-based proteins, grains, and seasonal produce.
- Schedule Section:**
 - Revenue Scheduling Enabled:**
 - Quantity Scheduling Enabled:**
 - Revenue Schedule Type:** Divide Amount into multiple inst...
 - Quantity Schedule Type:** Divide Amount into multiple inst...
 - Revenue Installment Period:** Monthly
 - Quantity Installment Period:** Weekly
 - Number Of Revenue Installments:** 3
 - Number Of Quantity Installments:** 12

At the bottom of the dialog, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Reps establish, update, and delete default schedules from the Product detail page.

	*SCHEDULE DATE	*QUANTITY	*REVENUE	COMMENTS
1	4/9/2018	1.00	\$150.00	discount
2	4/16/2018	1.00	\$0.00	
3	4/23/2018	1.00	\$0.00	
4	4/30/2018	1.00	\$0.00	
5	5/7/2018	1.00	\$0.00	
6	5/9/2018	0.00	\$180.00	
7	5/14/2018	1.00	\$0.00	
8	5/21/2018	1.00	\$0.00	
			TOTAL QUANTITY: 12	TOTAL REVENUE: \$510.00

Or, establish, reestablish, update, and delete schedules for opportunity products from the Opportunity detail page.

Accounts: Person Account Setup, Custom Quick Actions, and New Package Validation Available in Lightning Experience

Person Accounts are easier to use in Lightning Experience. You can configure page layouts and custom quick actions for person accounts in one place. Plus, our new package validation makes sure active person and business account records can't be removed inadvertently.

IN THIS SECTION:

[Set Up Person Accounts in Lightning Experience](#)

Set up person account page layouts, record types, and compact layouts without wasting time switching to Salesforce Classic.

[Take Advantage of Quick Action Improvements for Person Accounts](#)

Now, when sales reps create or update person accounts using quick actions, they see the correct name fields—Salutation, First Name, Middle Name, and Last Name. This makes it a snap for them to add or update information accurately, wherever you use quick actions, including on related record components.

[New Validation Process Prevents Issues After Uninstalling Packages](#)

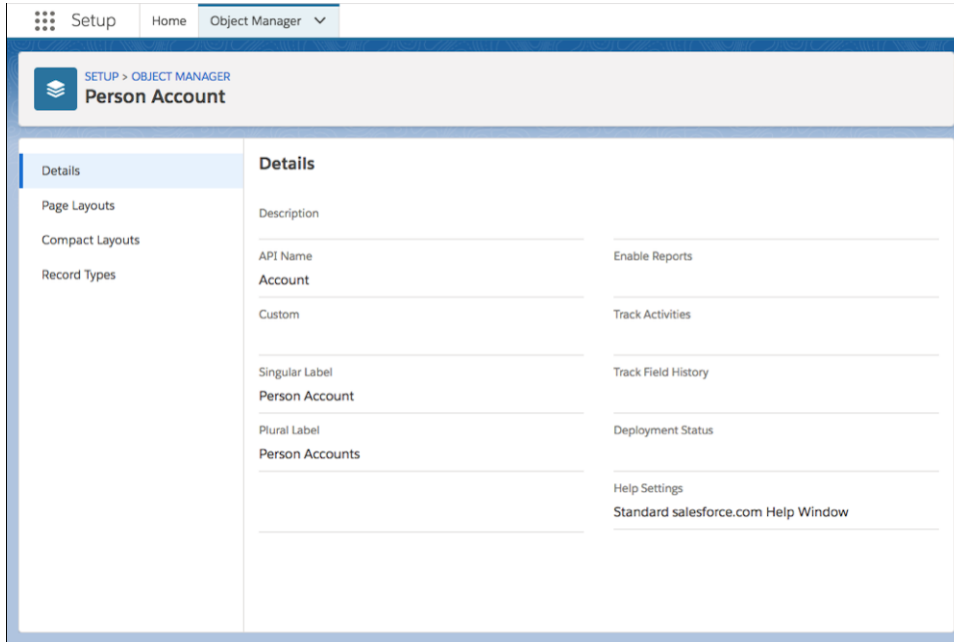
To save you from potential issues that come with removing all active account records, we've added a validation process. Now, when you uninstall a package containing account records, the validation process makes sure that at least one active business or person account record remains.

Set Up Person Accounts in Lightning Experience

Set up person account page layouts, record types, and compact layouts without wasting time switching to Salesforce Classic.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To set up person accounts in Lightning Experience, from the object management settings for person accounts, go to Page Layouts, Compact Layouts, and Record Types.



SEE ALSO:

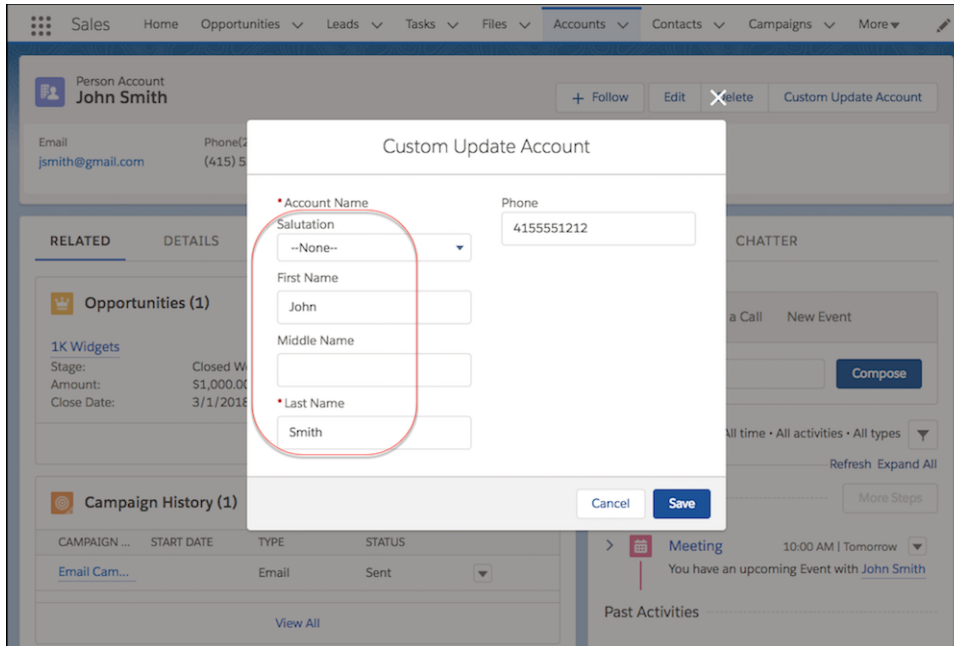
[IdeaExchange: Access Person Account Setup in Lightning](#)

Take Advantage of Quick Action Improvements for Person Accounts

Now, when sales reps create or update person accounts using quick actions, they see the correct name fields—Salutation, First Name, Middle Name, and Last Name. This makes it a snap for them to add or update information accurately, wherever you use quick actions, including on related record components.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, reps saw name fields for business accounts instead of those for person accounts, which could cause issues when they tried to save their work. Now they've got person account name fields at their fingertips, making quick actions a valuable timesaver.



How: If you already set up custom actions for person accounts, you're all done! To set up custom actions for person accounts, from the object management settings for accounts, go to **Buttons, Links, and Actions**. To set up custom create actions for person accounts, from Setup, in the Quick Find box, enter *Global Actions*, and then select **Global Actions**.

SEE ALSO:

[Salesforce Help: Create Object-Specific Quick Actions \(can be outdated or unavailable during release preview\)](#)

New Validation Process Prevents Issues After Uninstalling Packages

To save you from potential issues that come with removing all active account records, we've added a validation process. Now, when you uninstall a package containing account records, the validation process makes sure that at least one active business or person account record remains.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Path: Path for Contacts, Dependent Picklist Support

Path is all about making your team's processes run more smoothly. Help your reps build stronger relationships with their contacts by setting up a Path. Plus, your reps can travel a Path more easily by updating dependent picklists without having to break their stride.

IN THIS SECTION:

[Guide Reps Toward Success with Path for Contacts](#)

Now that Path is available on contacts, you can define the stages that are important for building stronger relationships with your company's contacts. Increase reps' success with tips and guidance that assist at each stage of the process.

[Update Dependent Picklists from Path](#)

Dependent picklists no longer block reps from moving smoothly along a Path. If the next step has dependent fields, reps can access and update all dependent fields when updating a record from a Path.

Guide Reps Toward Success with Path for Contacts

Now that Path is available on contacts, you can define the stages that are important for building stronger relationships with your company's contacts. Increase reps' success with tips and guidance that assist at each stage of the process.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Unlimited, Performance, and Developer editions.

How: To set up a path for contacts, create a custom picklist to base the path on.

SEE ALSO:

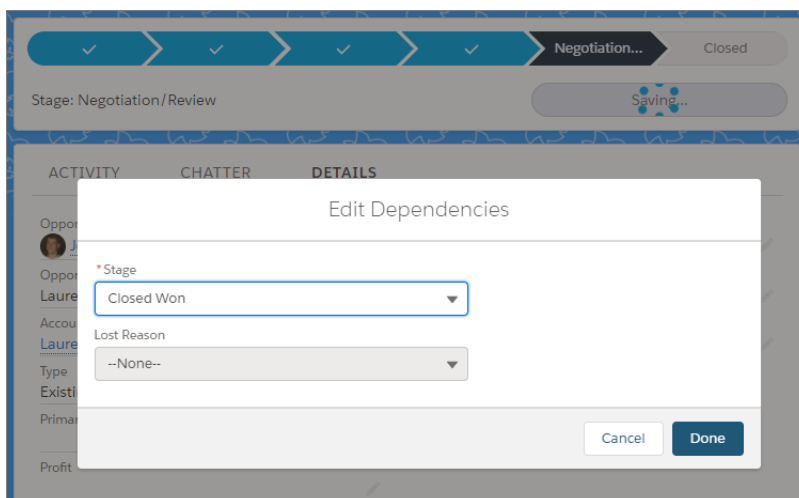
[Salesforce Help: Set Up a Path \(can be outdated or unavailable during release preview\)](#)

Update Dependent Picklists from Path

Dependent picklists no longer block reps from moving smoothly along a Path. If the next step has dependent fields, reps can access and update all dependent fields when updating a record from a Path.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Unlimited, Performance, and Developer editions.

How: Reps are prompted to update dependencies when they move a record to a step that has them.

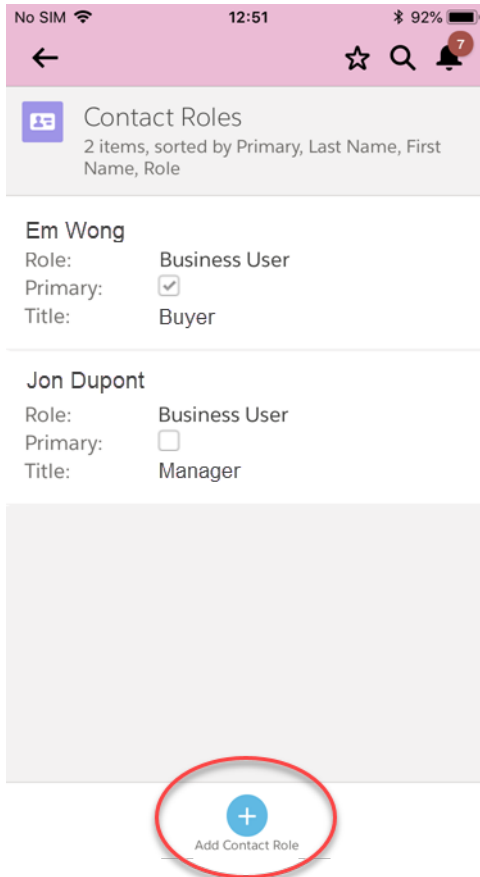


Contacts: Add Contact Roles on the Go

Now, add and view contact roles for opportunities from the Salesforce mobile app.

Where: This change applies all versions of the mobile app in all editions.

How: On the Contact Roles related list for an opportunity, tap **Add Contact Role** to add a new contract role to the opportunity. Tap a contact's name to view the contact's record details.



Productivity Features: Lightning Dialer Improvements, Email Insights, and More List Email Features

We're introducing a ton of new features for Lightning Dialer, including call monitoring and multiple voicemail messages. Your reps can also now see important sales context alongside relevant emails, and send list emails to campaigns.

IN THIS SECTION:

[Lightning Dialer: Call Monitoring, Multiple Voicemails, and Local Presence](#)

Offer better coaching to your sales reps with Call Monitoring. Dialer also now supports multiple prerecorded voicemail messages and logs calls that aren't connected.

[Einstein Activity Capture: Wider Availability, Email Insights, and Improved Activity Timeline](#)

You don't need a Sales Cloud Einstein or Inbox license to use Einstein Activity Capture. Plus, we added Email Insights and improved the activity timeline so that sales reps can zero in on activities that have insights. And now you can control how data is collected and processed.

[Activities: Tasks List View, Bulk Task Creation, Predefined Subjects, and More](#)

Boost your reps' productivity with the tasks list view, offering table view, split view, and Kanban view. Create predefined subjects that reps can use for tasks and events, and create copies of a task for colleagues. Plus, the activity timeline has a new filtering option to help reps focus on only the tasks they're involved with.

[Email Experience: List Emails for Campaigns, Campaign Filter for Contacts and Leads, and Email Attachment Management](#)

Your users can send list emails to campaigns and campaign members, filter contact and lead list views by campaign, and easily include email attachments by dragging them. You can encrypt email addresses for a list email.

[Email Templates: Simplified Email Template Management, New Merge Field Language, and Custom HTML Email Templates](#)

Reps have more flexibility when using Lightning email templates. They can manage them in one place, enhance them with a new merge field language, create custom HTML email templates, and reuse Visualforce email templates created in Salesforce Classic. If reps need to work with email templates in Salesforce Classic, the menu item is renamed.

[Kanban: Update Dependent Picklists](#)

Dependent picklists no longer block reps from moving a record to a different column. If a picklist has dependent fields, reps can access and update all dependent fields when updating a record from the Kanban view.

[Calendar: Usability Improvements in Lightning Experience](#)

Get the most out of calendar when you switch to Lightning Experience. No need to waste time opening records to work with calendar items. Now reps can drag events or other records on their calendars to update the start date or time. Plus, reps have better control over their screen real estate and more room to see details directly from the calendar. And now you can customize the look and feel of the New Event action by overriding the button on the calendar with a Lightning component.

[Sales Console: Pinned Sidebars, Lightning Console APIs, and More](#)

We continue to roll out improvements to Lightning console apps that the Sales Console can use. We added the ability to pin record information in the left and right sidebars. We also added more methods to the Lightning Console Javascript API that were previously available only in Salesforce Classic.

[Inbox: Email Insights and More Access to Activities Dashboard](#)

Your inbox is even smarter with Einstein Email Insights. Plus, all Inbox users can view the activities dashboard.

Lightning Dialer: Call Monitoring, Multiple Voicemails, and Local Presence

Offer better coaching to your sales reps with Call Monitoring. Dialer also now supports multiple prerecorded voicemail messages and logs calls that aren't connected.



Note: For now, we support outgoing calls only to the United States and Canada.

IN THIS SECTION:

[Coach Your Sales Reps with Call Monitoring \(Generally Available\)](#)

Improve your sales reps' selling techniques with personalized coaching. Use Call Monitoring to identify strengths and weaknesses in your reps' interactions, and then improve overall sales performance through coaching.

[Tailor Prerecorded Voicemail Messages for Different Types of Prospects](#)

Sales reps can record multiple voicemail messages for different types of prospects, then "drop" (or send) the prerecorded messages to recipients' voicemail boxes. Reps are no longer limited to a single voicemail drop recording. Less time leaving messages means more time selling.

[Show Local Numbers When Calling Prospects](#)

Increase the number of customers who engage with your team's calls. Local Presence dynamically displays phone numbers with the same area code as the prospects your reps are calling, so more calls are answered. The phone numbers are dedicated to your org. When a prospective customer returns the call, Local Presence routes it to the rep who made the initial call.

[Other Changes in Lightning Dialer](#)

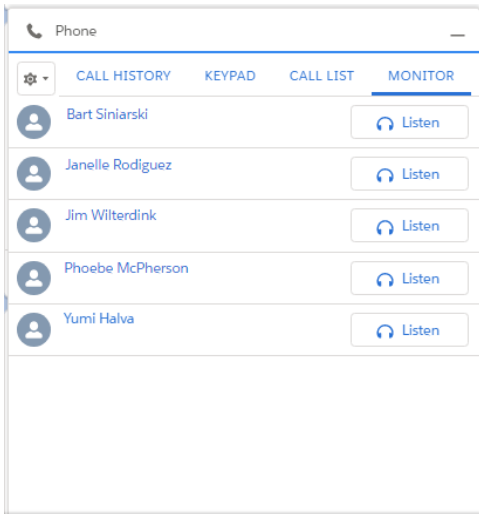
When dialing, sales reps previously saw a Dialing state that didn't allow reps to take notes or log calls that weren't connected. Lightning Dialer now automatically transitions to an active screen while dialing. Reps can log call details even if a prospect doesn't answer.

Coach Your Sales Reps with Call Monitoring (Generally Available)

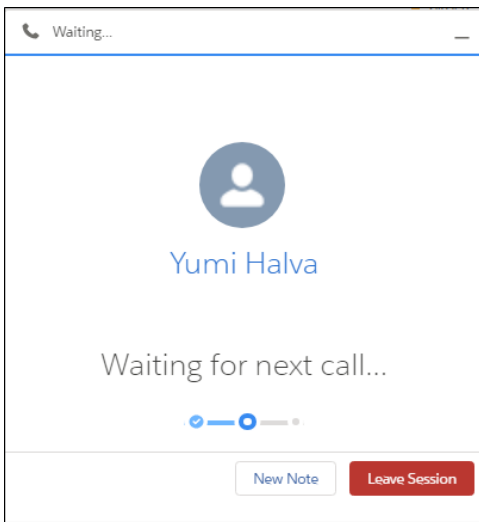
Improve your sales reps' selling techniques with personalized coaching. Use Call Monitoring to identify strengths and weaknesses in your reps' interactions, and then improve overall sales performance through coaching.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

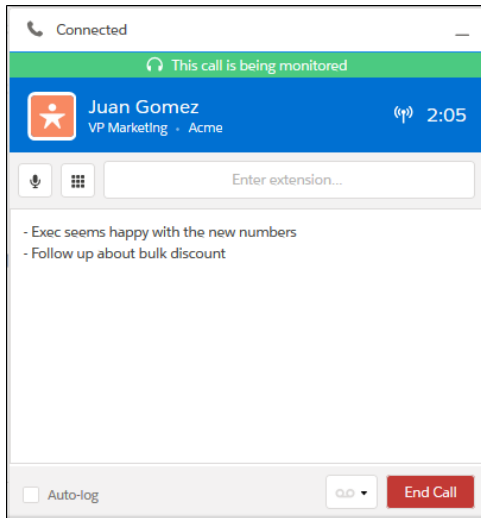
Why: Sales managers can coach their reps from the **Monitor** tab in the call panel. The panel displays the users that are one level below the manager based on role hierarchy. A manager can silently monitor a single rep's calls by clicking **Listen**.



Dialer waits for the sales rep's next call and automatically connects the manager when a call is placed.



When connected, managers see the record related to the person the rep's speaking to. Managers can also create a note related to the monitoring session. Calls are monitored silently, and audio from the manager isn't transferred to the call. Reps see a banner if their call is being monitored.



If required by law, users must notify the call recipient of call monitoring and stop monitoring on request of the call recipient.

How: To use Call Monitoring, you need role hierarchy set up in your org.

To allow users to use Call Monitoring, create a permission set with the Access Dialer Monitoring permission and assign it to relevant managers.

Managers can coach only one sales rep at a time. Only outbound calls are monitored. Call monitoring isn't available for incoming calls. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.

SEE ALSO:

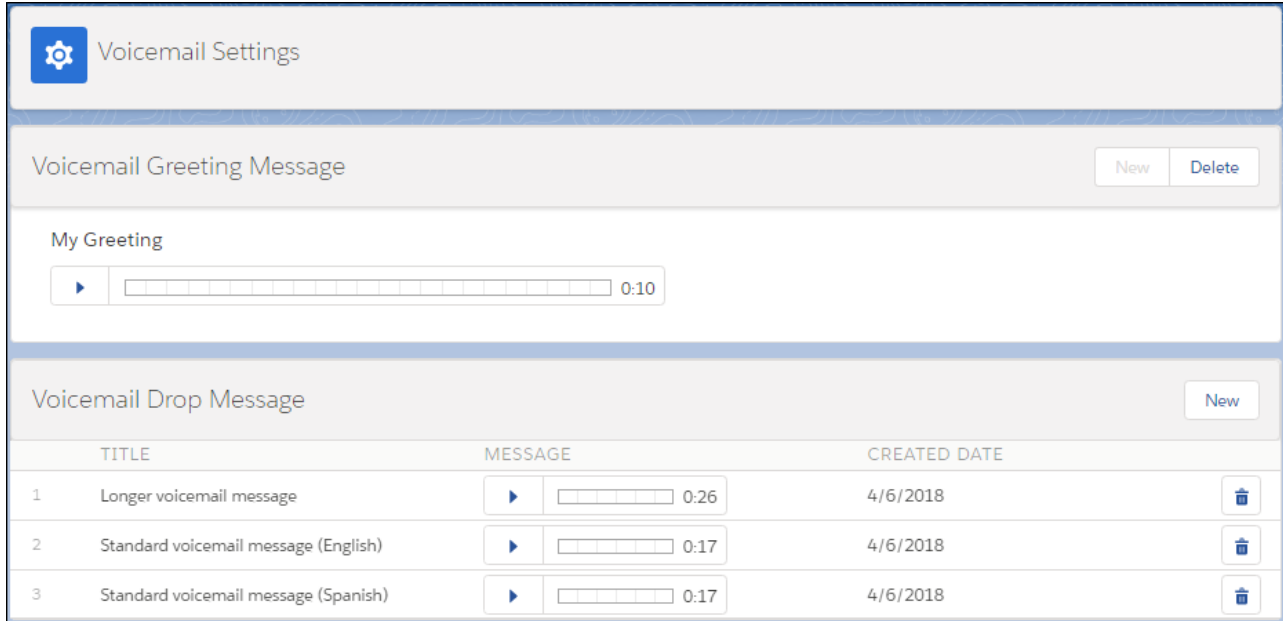
[Salesforce Help: Enable Call Monitoring \(can be outdated or unavailable during release preview\)](#)

Tailor Prerecorded Voicemail Messages for Different Types of Prospects

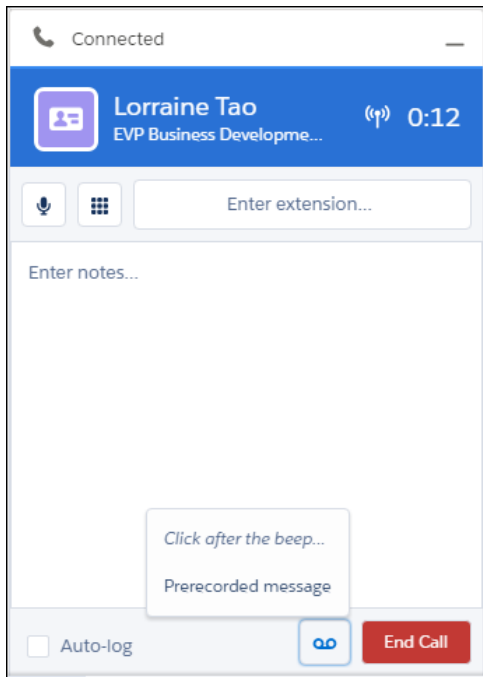
Sales reps can record multiple voicemail messages for different types of prospects, then "drop" (or send) the prerecorded messages to recipients' voicemail boxes. Reps are no longer limited to a single voicemail drop recording. Less time leaving messages means more time selling.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Why: Reps can select Voicemail Drop Settings from the call panel or their personal settings. For best results, we recommend starting the message as soon as the recording begins. A message can be up to 1 minute long.



To drop a voicemail message, click  and select the message right after the beep. You can create up to 10 messages.



Show Local Numbers When Calling Prospects

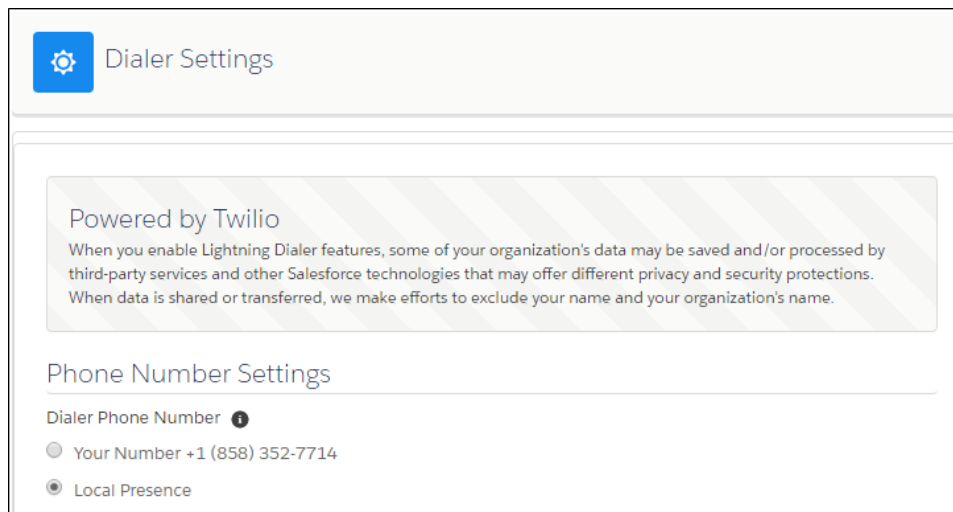
Increase the number of customers who engage with your team’s calls. Local Presence dynamically displays phone numbers with the same area code as the prospects your reps are calling, so more calls are answered. The phone numbers are dedicated to your org. When a prospective customer returns the call, Local Presence routes it to the rep who made the initial call.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: Users need both Dialer Inbound and Dialer Outbound licenses to use Local Presence. Local Presence is for use only by customers in the United States, and is intended to be used to dial only US numbers.

Why: Showing a local area code increases engagement and makes calls appear more relevant. Local Presence numbers are dedicated to your org.

Sales reps select the number that appears for outgoing calls from their personal settings.



How: To enable Local Presence, from Setup, enter *Local Presence* in the Quick Find box, and then select **Local Presence**. Provide a default callback number so returned calls always reach your organization, even if the initial caller is no longer with your organization.

SEE ALSO:

[Salesforce Help: Enable Local Presence \(can be outdated or unavailable during release preview\)](#)

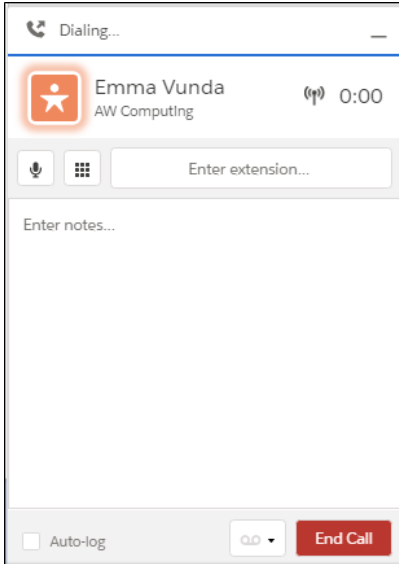
Other Changes in Lightning Dialer

When dialing, sales reps previously saw a Dialing state that didn't allow reps to take notes or log calls that weren't connected. Lightning Dialer now automatically transitions to an active screen while dialing. Reps can log call details even if a prospect doesn't answer.

Where: These changes apply to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

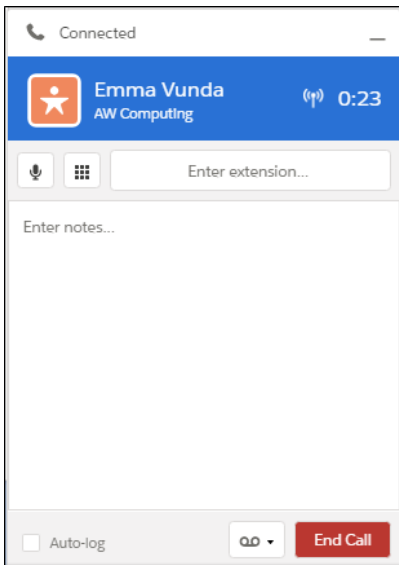
Take Notes While Calling Prospects

Reps can take notes before a call is connected.



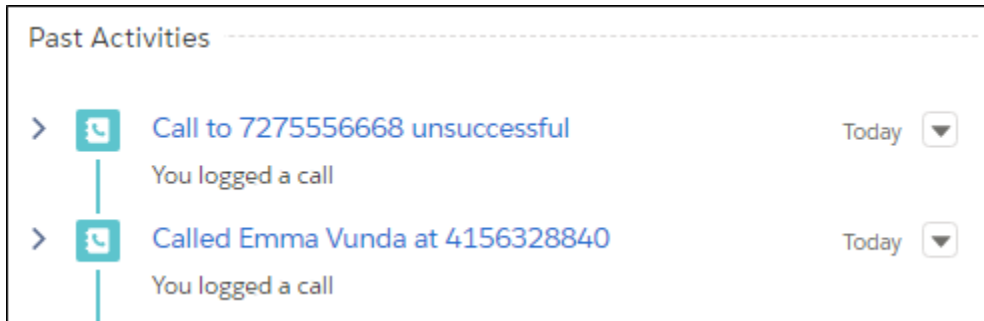
See When a Call Is Connected

A color transition shows when a call is connected from the ringing state.



Log Call Attempts

Previously, only connected calls were logged. Reps can now easily track all call attempts.



Einstein Activity Capture: Wider Availability, Email Insights, and Improved Activity Timeline

You don't need a Sales Cloud Einstein or Inbox license to use Einstein Activity Capture. Plus, we added Email Insights and improved the activity timeline so that sales reps can zero in on activities that have insights. And now you can control how data is collected and processed.

IN THIS SECTION:

[Give the Gift of Automatic Logging](#)

More sales reps can say goodbye to logging and hello to smarter selling. Users with a Sales Cloud license can use Einstein Activity Capture, which automatically associates emails and events with related Salesforce records. A Sales Cloud Einstein or Inbox license is no longer required.

[Get Smarter About Email with Email Insights in the Activity Timeline](#)

Send the perfect response at the perfect time. With Einstein Activity Capture, users get Einstein Email Insights, which shows critical sales context alongside relevant emails, making it easier to send the perfect response at the perfect time. Sales reps can choose to see only emails with Email Insights or all activities. And they can switch back and forth easily as needs change. Email insights is displayed in the activity timeline and in Inbox.

[Access All Activity History in Einstein Activity Capture](#)

Einstein Activity Capture users can now access all past and archived activities from the All Activity History page. Seeing activity history helps understand the context of customer engagement and find specific activities.

[Manage Data Policies](#)

You have more control over how Einstein Activity Capture and Inbox collects and processes customer data. Use the new Delete Email and Events setting to prevent Salesforce from storing a person's activities and showing them on the activity timeline. The Excluded from Machine Learning setting doesn't factor in future email and events associated with a particular person into machine-learning models and third-party data enrichment.

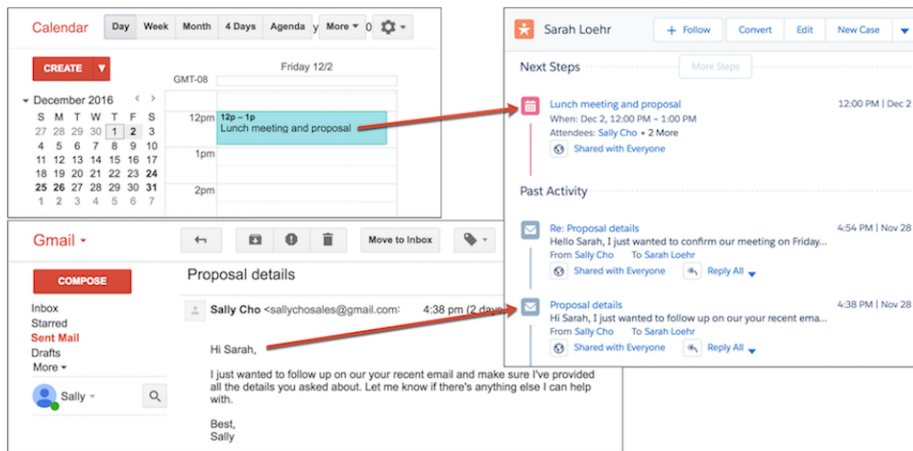
Give the Gift of Automatic Logging

More sales reps can say goodbye to logging and hello to smarter selling. Users with a Sales Cloud license can use Einstein Activity Capture, which automatically associates emails and events with related Salesforce records. A Sales Cloud Einstein or Inbox license is no longer required.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: To use Einstein Activity Capture, Sales Cloud users must have the Standard Einstein Activity Capture permission set.

Why: When sales team connect their Google™ or Microsoft® account to Salesforce, activities from those accounts show up on business and person accounts, contacts, leads, opportunities, quotes, and contracts in Salesforce. Plus, reps get read-only access to the Activities dashboard, which lets them view a summary of sales activities.



How: In Setup, go to the setup assistant under Einstein Activity Capture. The setup assistant guides you through all steps to configure and turn on Einstein Activity Capture. Then assign the Standard Einstein Activity Capture permission set to up to 100 Sales Cloud users.

SEE ALSO:

[Salesforce Help: Set Up Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

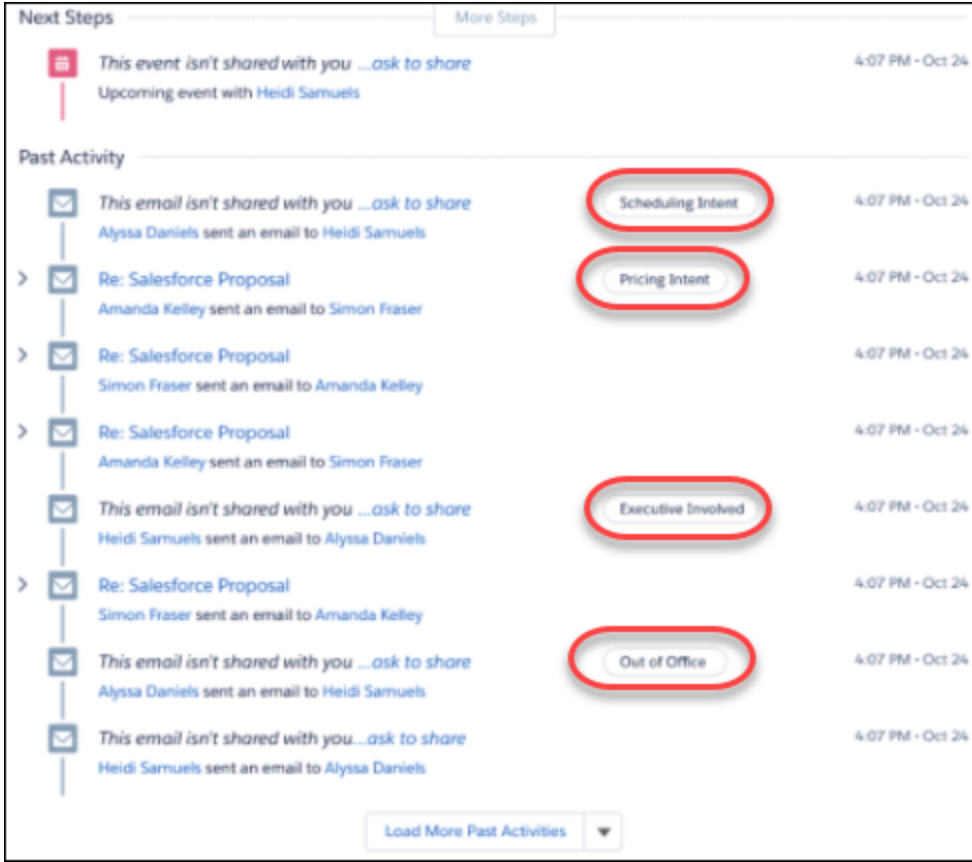
Get Smarter About Email with Email Insights in the Activity Timeline

Send the perfect response at the perfect time. With Einstein Activity Capture, users get Einstein Email Insights, which shows critical sales context alongside relevant emails, making it easier to send the perfect response at the perfect time. Sales reps can choose to see only emails with Email Insights or all activities. And they can switch back and forth easily as needs change. Email insights is displayed in the activity timeline and in Inbox.

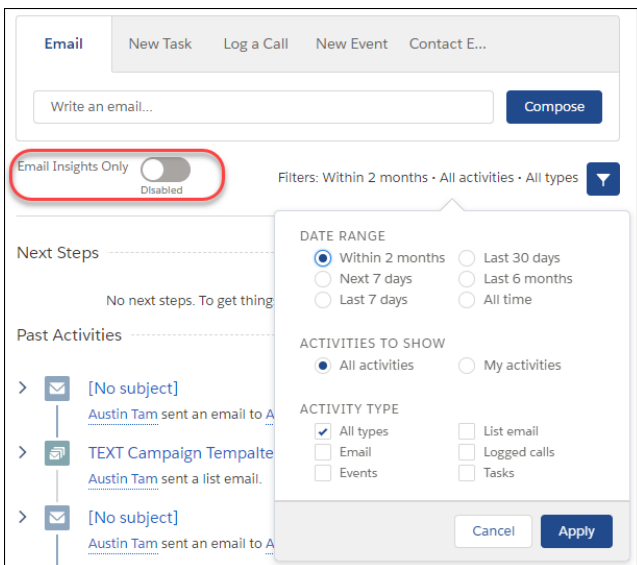
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Who: This feature is available to all Einstein Activity Capture users.

Why: Email Insights give sales reps information they can use to plan their next steps. For example, if a rep sees the Scheduling Intent insight, the rep knows that the lead is interested in setting or rescheduling a meeting. The rep can respond quickly with a new or updated meeting invite.



Reps can turn down the noise in their activity timeline by filtering the timeline to show only emails with insights.



How: Email Insights is available when you turn on Einstein Activity Capture. If you use Einstein Activity Capture through a Sales Cloud Einstein or Inbox license, Email Insights is on by default. If you use Einstein Activity Capture through only a Sales Cloud license, you must review and accept the Email Insights terms of service before you can turn it on.

SEE ALSO:

[Salesforce Help: Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

Access All Activity History in Einstein Activity Capture

Einstein Activity Capture users can now access all past and archived activities from the All Activity History page. Seeing activity history helps understand the context of customer engagement and find specific activities.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: In the activity timeline, from the More Past Activity dropdown list, select **View All**.



Note: The All Activity History page shows only Salesforce-generated activities. Activities added by Einstein Activity Capture aren't included.

Manage Data Policies

You have more control over how Einstein Activity Capture and Inbox collects and processes customer data. Use the new Delete Email and Events setting to prevent Salesforce from storing a person's activities and showing them on the activity timeline. The Excluded from Machine Learning setting doesn't factor in future email and events associated with a particular person into machine-learning models and third-party data enrichment.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: To use these settings, from Setup, in the Quick Find box enter *Data Policies*. Under Einstein Activity Capture, click **Data Policies**.

Activities: Tasks List View, Bulk Task Creation, Predefined Subjects, and More

Boost your reps' productivity with the tasks list view, offering table view, split view, and Kanban view. Create predefined subjects that reps can use for tasks and events, and create copies of a task for colleagues. Plus, the activity timeline has a new filtering option to help reps focus on only the tasks they're involved with.

IN THIS SECTION:

[Do More with Tasks from the List View](#)

Reps can do much more with tasks now that they can see a list view. Built-in list view filters let reps find tasks quickly, columns are sortable, and reps can apply filters to narrow down what they see.

[Create Copies of a Task for Colleagues](#)

When sales reps create a task, they can assign it to other users and groups. Each user gets their own copy of the task. It's a fast way for reps to create tasks in bulk.

[Create Predefined Subjects for Tasks and Events](#)

Reps can create tasks and events faster with predefined subject values. You define subject values based on what's most useful to reps.

[Get More Filter Options in the Activity Timeline](#)

Sales reps can filter their activity timelines so they can focus on their own activities. Plus, reps can also see a filter summary from the timeline, so they don't have to open the filter to see what's active. We've also renamed the Default (all time) filter to All time.

[Keep Activities Safe and Secure](#)

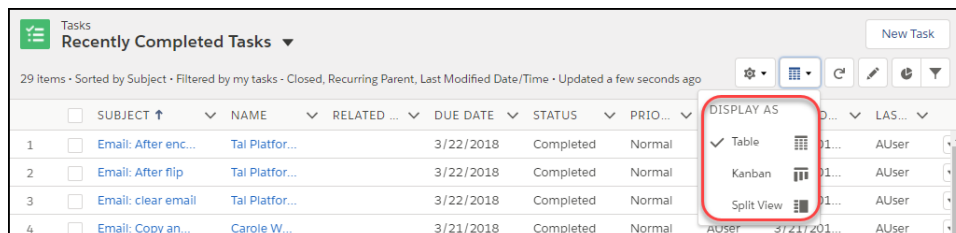
Keep your company compliant with regulations and obligations about personally identifiable information. Use Shield Platform Encryption to secure the task comments and event descriptions in activities.

Do More with Tasks from the List View

Reps can do much more with tasks now that they can see a list view. Built-in list view filters let reps find tasks quickly, columns are sortable, and reps can apply filters to narrow down what they see.

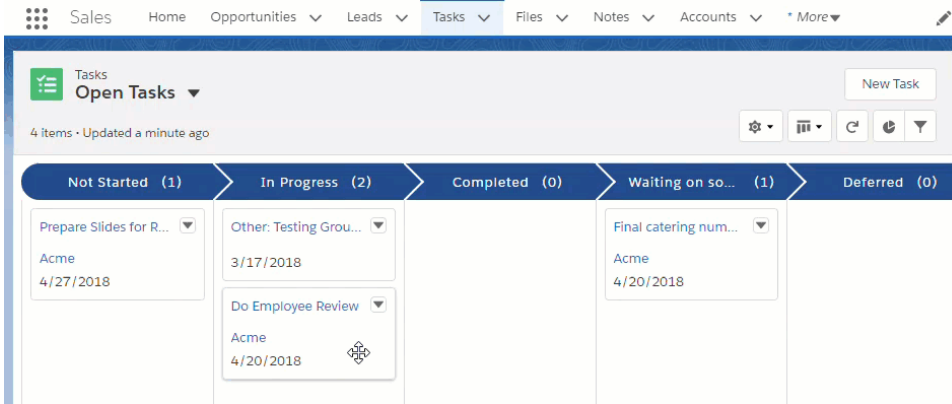
Where: This change applies to Lightning Experience in Personal, Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

How: Reps have three views to work with when viewing and managing tasks.

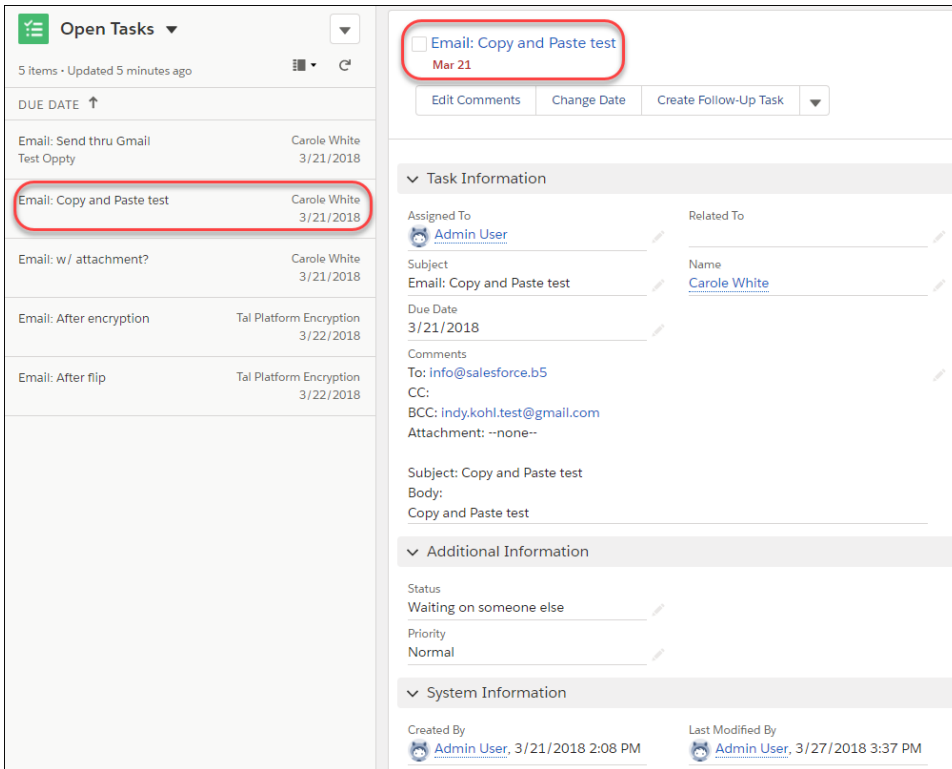


Most users are familiar with the table view, because it's available for other objects, such as contacts and accounts.

Users can change the view from the **Display As** dropdown list.



The Kanban view lets users view tasks by status. Reps drag a task to change the status.



With the split view, users have the full list of tasks available when drilling down on one task.

SEE ALSO:

[Salesforce Help: Display a Visual Summary with Kanban](#) (can be outdated or unavailable during release preview)

[Idea Exchange: Ability to Sort List Task List Views in Lightning](#)

[Idea Exchange: Make Task List Configurable in Tasks Page of Lightning Experience](#)

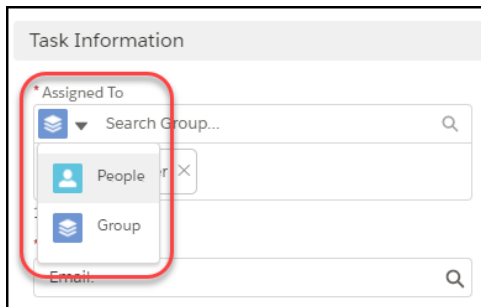
[Idea Exchange: Support Custom List Views for Tasks Tab in Lightning Experience](#)

Create Copies of a Task for Colleagues

When sales reps create a task, they can assign it to other users and groups. Each user gets their own copy of the task. It's a fast way for reps to create tasks in bulk.

Where: This feature is new to Lightning Experience in Personal, Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

How: When creating a task from the task list view, a rep can create individual copies of a task for other people and groups.



When the task is saved, each person has a copy of the task, with their name in the Assigned To field.

SEE ALSO:

[Salesforce Help: Create and Edit Groups \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Using Tasks \(can be outdated or unavailable during release preview\)](#)

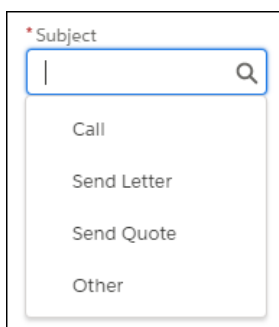
[Idea Exchange: Ability to Assign Tasks in Lightning to Multiple Users](#)

Create Predefined Subjects for Tasks and Events

Reps can create tasks and events faster with predefined subject values. You define subject values based on what's most useful to reps.

Where: This feature is available in Lightning Experience and all versions of the mobile app in Personal, Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: When reps create tasks and events, they can choose a predefined subject, such as Call, Send Letter, or Send Quote. These subjects let reps organize and sort their tasks based on what the tasks are. Without having to enter the type of task, reps can focus on adding details to describe the task. For example, a rep can choose "Call" and then add "confirmed presentation this Friday".



Later, when the sales manager is searching for a task, they don't have to wonder how the rep named the task, such as "Phone", "Office call", or "Follow-up call". The common entry—Call—makes it much easier.

How: You can create predefined subjects from Setup. Go to **Object Manager** and choose either **Event** or **Task**. Select **Fields & Relationships** and then **Subject**. The Salesforce admin in this example is predefining values for the task subject field.

Values	API Name	Default	Modified By
Call	Call	<input type="checkbox"/>	Tasks Admin User , 9/1/2017 1:32 PM
Send Letter	Send Letter	<input type="checkbox"/>	Tasks Admin User , 9/1/2017 1:32 PM
Send Quote	Send Quote	<input type="checkbox"/>	Tasks Admin User , 9/1/2017 1:32 PM
Other	Other	<input type="checkbox"/>	Tasks Admin User , 9/1/2017 1:32 PM

SEE ALSO:

[Salesforce Help: Add or Edit Picklist Values \(can be outdated or unavailable during release preview\)](#)

[Idea Exchange: Task Subject Field as Picklist in Lightning](#)

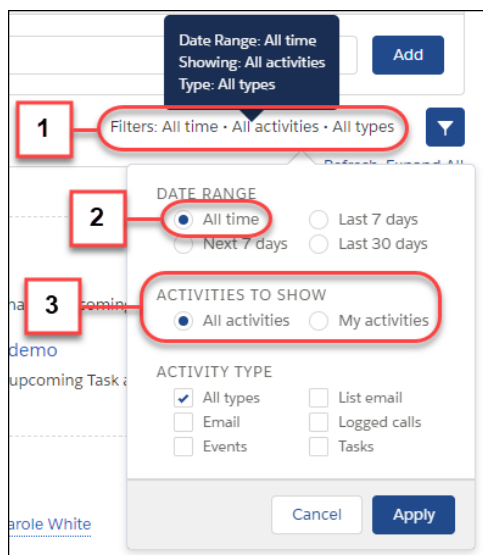
[Idea Exchange: Auto-Populate a Task Subject with a Template](#)

Get More Filter Options in the Activity Timeline

Sales reps can filter their activity timelines so they can focus on their own activities. Plus, reps can also see a filter summary from the timeline, so they don't have to open the filter to see what's active. We've also renamed the Default (all time) filter to All time.

Where: This feature is new to Lightning Experience in Personal, Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: These changes make the activity timeline even more useful to reps.



Users can see their filter settings in the filters summary (1).

Default (all time) is now labeled All time (2). The same date ranges and activity types are available as in previous releases, but users with Einstein Activity Capture see a different set of data ranges.

The Activities to Show option (3) lets reps decide whether to show only their activities. For example, if a rep sends an email to an owned contact, it displays when the rep chooses My activities. The All activities option shows emails to contacts from all reps on the sales team.

The activity timeline no longer includes the label Activity Timeline.

SEE ALSO:

[Salesforce Help: Activity Timeline Filters \(can be outdated or unavailable during release preview\)](#)

Keep Activities Safe and Secure

Keep your company compliant with regulations and obligations about personally identifiable information. Use Shield Platform Encryption to secure the task comments and event descriptions in activities.

Where: This change applies to Lightning Experience in Contact Manager, Enterprise, Performance, Unlimited, and Developer editions. Shield Platform Encryption requires purchasing Salesforce Shield.

How: In Setup, enter *Platform Encryption* in the Quick Find box, and then select **Encryption Policy** under Platform Encryption. Select **Encrypt Fields**, and click **Edit**. Select the fields that you want to encrypt.

SEE ALSO:

[Encrypt Fields for Your Activities \(Generally Available\)](#)

Email Experience: List Emails for Campaigns, Campaign Filter for Contacts and Leads, and Email Attachment Management

Your users can send list emails to campaigns and campaign members, filter contact and lead list views by campaign, and easily include email attachments by dragging them. You can encrypt email addresses for a list email.

IN THIS SECTION:

[Send List Emails to Campaigns and Campaign Members](#)

Sales reps can add campaigns and individual campaign members as their list email recipients, expanding their reach to customers. The list email appears on the activity timeline for the recipient and the recipient's account, if Roll up activities to a contact's primary account is enabled. Logging list emails gives your company a 360-degree view of email activity.

[Filter by Campaign to Send Precise List Emails](#)

Sales reps can send list emails targeted to a more exact set of recipients by filtering lead and contact list views by campaign membership. For instance, a rep has a list view of customers invited to a trade show. Some customers are part of an executive involvement campaign. Now the rep can easily follow up with customers who have executive sponsors.

[Keep List Email Under Lock and Key](#)

Keep your company compliant with regulations and obligations about personally identifiable information. Use Shield Platform Encryption to secure the names and email addresses used in list emails.

[Skip the Clicks—Drag Your Email Attachments](#)

Now you can attach files to emails without those pesky repetitive clicks. Simply drag the file into the body of the email.

[New Location for Email Composer Buttons](#)

The attach file, insert merge field, use template, and preview email buttons are now above the Related To field in the email composer.

[Configure Email Relays for Each Domain](#)

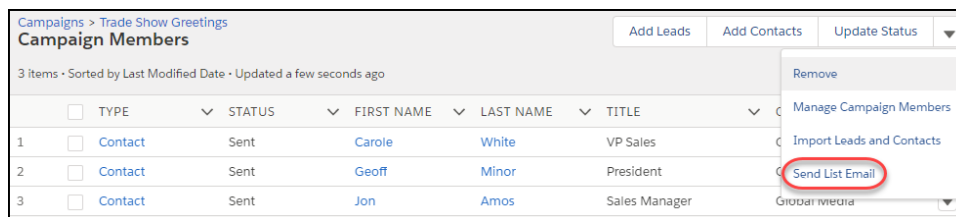
If your company sends email from more than one email domain, you can now configure separate email relays for each domain. An email relay routes email sent from Salesforce through your company's email servers.

Send List Emails to Campaigns and Campaign Members

Sales reps can add campaigns and individual campaign members as their list email recipients, expanding their reach to customers. The list email appears on the activity timeline for the recipient and the recipient's account, if Roll up activities to a contact's primary account is enabled. Logging list emails gives your company a 360-degree view of email activity.

Where: This change applies to Lightning Experience in Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When reps view a campaign, they can choose individual campaign members or all members, and select **Send List Email** from the action dropdown list.



SEE ALSO:

[Send List Emails to Campaign Members](#)

[Salesforce Help: Considerations for Sending List Email in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable Roll Up of Activities to a Contact's Primary Account](#)

[Salesforce Help: List Email Limitations \(can be outdated or unavailable during release preview\)](#)

[Idea Exchange: Mass Email All Campaign Members From the Campaign View](#)

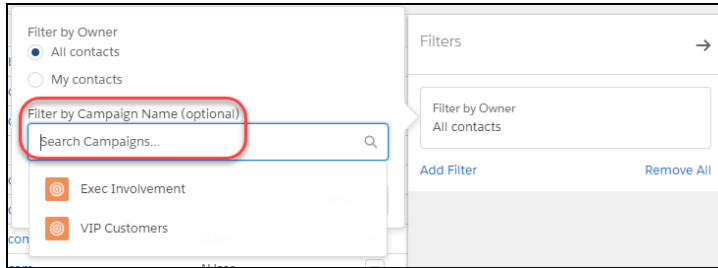
[Idea Exchange: Relate Mass Emails to Other Records, Such as Account, Opportunity, and Campaign](#)

Filter by Campaign to Send Precise List Emails

Sales reps can send list emails targeted to a more exact set of recipients by filtering lead and contact list views by campaign membership. For instance, a rep has a list view of customers invited to a trade show. Some customers are part of an executive involvement campaign. Now the rep can easily follow up with customers who have executive sponsors.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To filter by campaign, in the contact or lead list view, click **Filter by Owner** and choose a campaign. Then save the changes.



SEE ALSO:

[Salesforce Help: Edit List View Filters in Lightning Experience \(can be outdated or unavailable during release preview\)](#)
[Filter Lead and Contact List Views by Campaign](#)

Keep List Email Under Lock and Key

Keep your company compliant with regulations and obligations about personally identifiable information. Use Shield Platform Encryption to secure the names and email addresses used in list emails.

Where: This change applies to Lightning Experience in Contact Manager, Enterprise, Performance, Unlimited, and Developer editions. Shield Platform Encryption requires purchasing Salesforce Shield.

How: In Setup, enter *Platform Encryption* in the Quick Find box, and then select **Encryption Policy** under Platform Encryption. Select **Encrypt Fields**, and click **Edit**. Locate List Email and List Email Sent Result, and select the fields that you want to encrypt.

SEE ALSO:

[Encrypt Your List Emails](#)

Skip the Clicks—Drag Your Email Attachments

Now you can attach files to emails without those pesky repetitive clicks. Simply drag the file into the body of the email.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

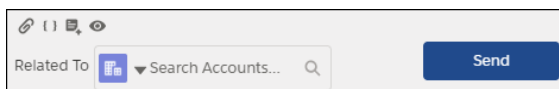
[Attach Your Files to Emails with Drag and Drop](#)

New Location for Email Composer Buttons

The attach file, insert merge field, use template, and preview email buttons are now above the Related To field in the email composer.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When users compose an email, the buttons are in the left corner of the composer.



Configure Email Relays for Each Domain

If your company sends email from more than one email domain, you can now configure separate email relays for each domain. An email relay routes email sent from Salesforce through your company's email servers.

Where: This change applies to Salesforce Classic and Lightning Experience, in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Configuring email relays requires the Email Administration, Customize Application, and View Setup user permissions.

How:

1. From Setup, enter *Email Relay Activation* in the Quick Find box, then select **Email Relay Activation**.
2. To use the multiple email relay feature, select **Try it now!** If you have an existing email relay, your host information is preserved when you activate the multiple email relay feature.
3. After you configure your email relays, enter *Email Domain Filters* in the Quick Find box, then select **Email Domain Filters**,
4. Select **Create Email Domain Filter**.

Email Templates: Simplified Email Template Management, New Merge Field Language, and Custom HTML Email Templates

Reps have more flexibility when using Lightning email templates. They can manage them in one place, enhance them with a new merge field language, create custom HTML email templates, and reuse Visualforce email templates created in Salesforce Classic. If reps need to work with email templates in Salesforce Classic, the menu item is renamed.

IN THIS SECTION:

[Restrict Use of Salesforce Classic HTML-Based Email Templates to Secure Browsers \(Critical Update\)](#)

This critical update prevents using HTML-based email templates, such as custom, Visualforce, or standard HTML templates, from Microsoft Internet Explorer. Internet Explorer doesn't support the Salesforce Content Security Policy (CSP), so it can't provide the required browser protection. We recommend that you use a browser with CSP support, such as Microsoft Edge, Google Chrome, or Mozilla Firefox.

[Manage Lightning Email Templates in One Place](#)

Create, edit, clone, and delete your Lightning email templates—all from the Email Templates page.

[Salesforce Classic Email Template Setup Has a New Name](#)

To distinguish Salesforce Classic and Lightning Experience email templates, we renamed Email Templates to Classic Email Templates.

[Boost the Effectiveness of Email Templates with HTML](#)

Make your emails more enticing to readers with styling, tags, and attributes. You can now add HTML to Lightning email templates.

[Unify Contact, Lead, and User Merge Fields in Email Templates with a New Merge Language](#)

The Handlebars Merge Language (HML) is replacing the Salesforce Merge Language (SML) in Lightning email templates. When you specify a merge field for a recipient, the merge field shows the corresponding field for a contact, lead, or user. No need to create separate templates for contacts, leads, and users, because they can all be in one template. You can also continue to use your SML templates.

[Put Your Visualforce Email Templates to Work in Lightning Experience](#)

Don't let all those Visualforce email templates that you created in Salesforce Classic go to waste. Sales reps can use the email templates in Lightning Experience. Because Lightning email templates can't replicate all the functionality available with Visualforce, reps can use these email templates in Lightning Experience and access the Visualforce features.

Restrict Use of Salesforce Classic HTML-Based Email Templates to Secure Browsers (Critical Update)

This critical update prevents using HTML-based email templates, such as custom, Visualforce, or standard HTML templates, from Microsoft Internet Explorer. Internet Explorer doesn't support the Salesforce Content Security Policy (CSP), so it can't provide the required browser protection. We recommend that you use a browser with CSP support, such as Microsoft Edge, Google Chrome, or Mozilla Firefox.

Where: This change applies to Salesforce Classic in all editions, except Personal Edition.

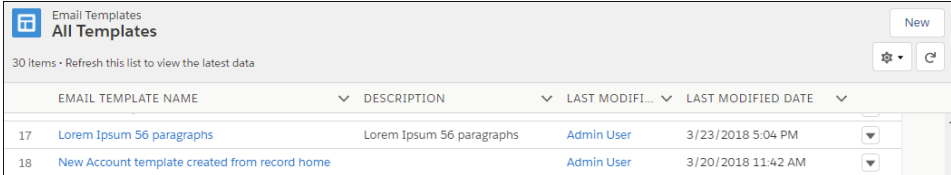
How: Although we recommend not using Internet Explorer for HTML-based templates, you can override this restriction. In Setup, under Session Settings, select **Override Restriction for Accessing HTML-Based Email Templates in Salesforce Classic Using Internet Explorer**.

Manage Lightning Email Templates in One Place

Create, edit, clone, and delete your Lightning email templates—all from the Email Templates page.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Reps can use the Email Templates page to manage all their Lightning email templates in one place.



EMAIL TEMPLATE NAME	DESCRIPTION	LAST MODIFI...	LAST MODIFIED DATE
17 Lorem Ipsum 56 paragraphs	Lorem Ipsum 56 paragraphs	Admin User	3/23/2018 5:04 PM
18 New Account template created from record home		Admin User	3/20/2018 11:42 AM

Reps can't create views. The list view is read-only. You still manage Classic email templates in Setup.

SEE ALSO:

[Salesforce Classic Email Template Setup Has a New Name](#)

[Idea Exchange: Lightning Email Template Management](#)

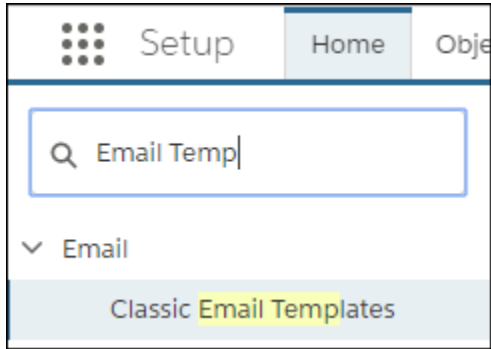
[Idea Exchange: Manage Public Templates Without View and Setup Configuration](#)

Salesforce Classic Email Template Setup Has a New Name

To distinguish Salesforce Classic and Lightning Experience email templates, we renamed Email Templates to Classic Email Templates.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: In Setup, the term Classic Email Templates makes it clear that this option is only for Classic email templates.



How: From Setup, enter *Email Template* in the Quick Find box, and then select **Classic Email Templates**.

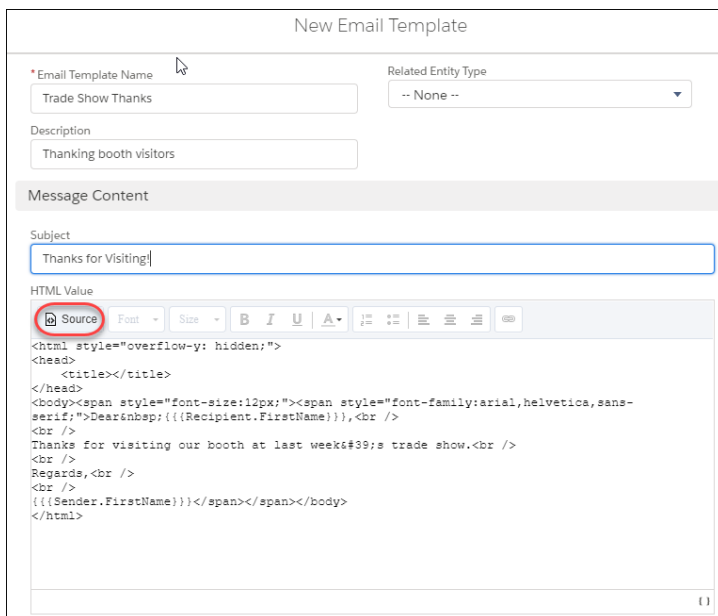
 **Note:** In Lightning Experience, Classic email templates are accessible only through Setup.

Boost the Effectiveness of Email Templates with HTML

Make your emails more enticing to readers with styling, tags, and attributes. You can now add HTML to Lightning email templates.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: While creating or editing a Lightning email template, click **Source**. Edit the HTML tags and the content. Click **Source** again to see a preview.



SEE ALSO:

[Salesforce Help: Create an Email Template in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Idea Exchange: Create HTML Lightning Email Templates](#)


[Idea Exchange: Create Quality HTML Email Templates with Editable Regions](#)

Unify Contact, Lead, and User Merge Fields in Email Templates with a New Merge Language

The Handlebars Merge Language (HML) is replacing the Salesforce Merge Language (SML) in Lightning email templates. When you specify a merge field for a recipient, the merge field shows the corresponding field for a contact, lead, or user. No need to create separate templates for contacts, leads, and users, because they can all be in one template. You can also continue to use your SML templates.


Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Create a template, or open an existing one in Lightning Experience.

Click  in the email template to open the merge field picker and insert merge fields.

The screenshot shows the 'Insert Merge Field' dialog. On the left, a sidebar lists recipient categories: Recipient, Sender, Organization, Account, Asset, Asset Relationship, Campaign, Case, Contract, Opportunity, Order, Product, Solution, and Work Order. The 'Recipient' category is selected. The main area shows a search bar and a list of fields with radio buttons for selection. The 'First Name' field is selected, and its radio buttons for 'USER', 'LEAD', and 'CONTACT' are visible, with 'CONTACT' being the active selection. At the bottom, there are 'Cancel' and 'Insert' buttons.

Merge fields have a new format: {{{Object.Field}}}.

 **Note:** Although based on the Handlebars template language, our HML implementation doesn't contain every Handlebars feature.

SEE ALSO:

[Salesforce Help: Use the Handlebars Template Language for Lightning Email Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Convert a Lightning Email Template from SML to HML \(can be outdated or unavailable during release preview\)](#)


Put Your Visualforce Email Templates to Work in Lightning Experience

Don't let all those Visualforce email templates that you created in Salesforce Classic go to waste. Sales reps can use the email templates in Lightning Experience. Because Lightning email templates can't replicate all the functionality available with Visualforce, reps can use these email templates in Lightning Experience and access the Visualforce features.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: You can use Visualforce email templates only in regular emails, not in list emails.

The subject and body are read-only after the template is inserted. Dynamic attachments are shown but are inactive, and you can't remove them.

 **Note:** You can't use Visualforce email templates with cases.

SEE ALSO:

[Salesforce Help: Use Your Classic Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Considerations for Using Your Classic Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

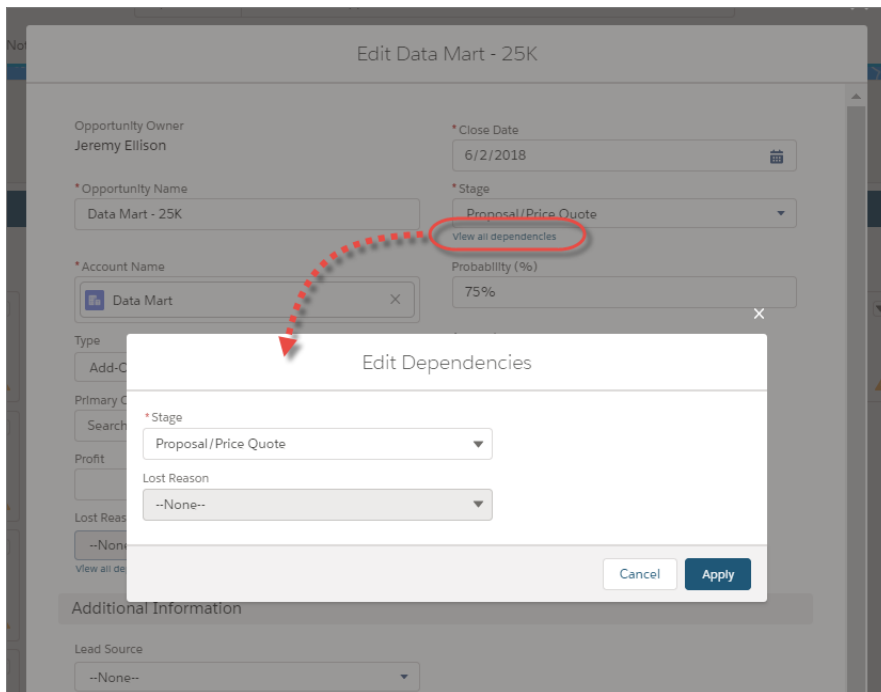
[Idea Exchange: Visualforce Email Templates in Lightning Experience](#)

Kanban: Update Dependent Picklists

Dependent picklists no longer block reps from moving a record to a different column. If a picklist has dependent fields, reps can access and update all dependent fields when updating a record from the Kanban view.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Unlimited, Performance, and Developer editions.

How: Edit a record from the Kanban view, then click **View all dependencies** under a dependent picklist field to view and update dependent fields.



Calendar: Usability Improvements in Lightning Experience

Get the most out of calendar when you switch to Lightning Experience. No need to waste time opening records to work with calendar items. Now reps can drag events or other records on their calendars to update the start date or time. Plus, reps have better control over their screen real estate and more room to see details directly from the calendar. And now you can customize the look and feel of the New Event action by overriding the button on the calendar with a Lightning component.

IN THIS SECTION:

[Update Calendar Items by Dragging Them in Lightning Experience](#)

Sales reps can quickly and easily reschedule meetings and update due dates by dragging meetings, tasks, and other time-sensitive records to new time slots. No more clicking through to record detail pages to update records on calendars. This feature supports superior accessibility options, so reps can drag items using a mouse or the Spacebar and arrow keys.

[Enhance Your Calendar View in Lightning Experience](#)

Hide the side panel details in your calendar for easier editing and viewing of event details, especially on devices with smaller screens.

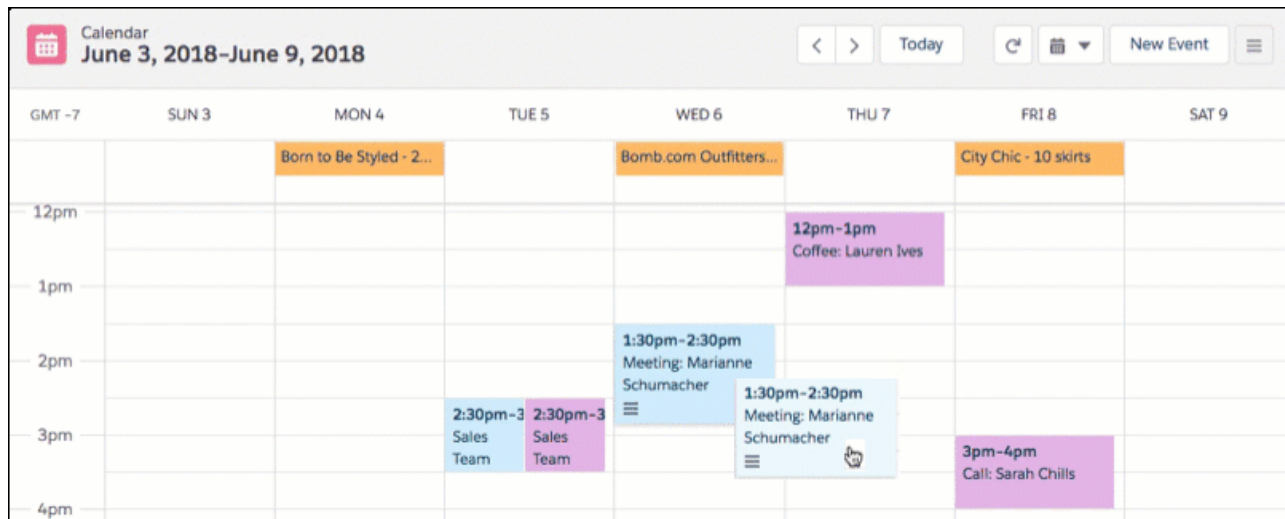
[Override the New Event Button on the Calendar in Lightning Experience](#)

Customize the New Event action so that it's most relevant to your business process, and let your teams take that action directly from the calendar. You can make this possible using a custom Lightning component.

Update Calendar Items by Dragging Them in Lightning Experience

Sales reps can quickly and easily reschedule meetings and update due dates by dragging meetings, tasks, and other time-sensitive records to new time slots. No more clicking through to record detail pages to update records on calendars. This feature supports superior accessibility options, so reps can drag items using a mouse or the Spacebar and arrow keys.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.



SEE ALSO:

[Productivity Features: Lightning Experience Considerations](#)

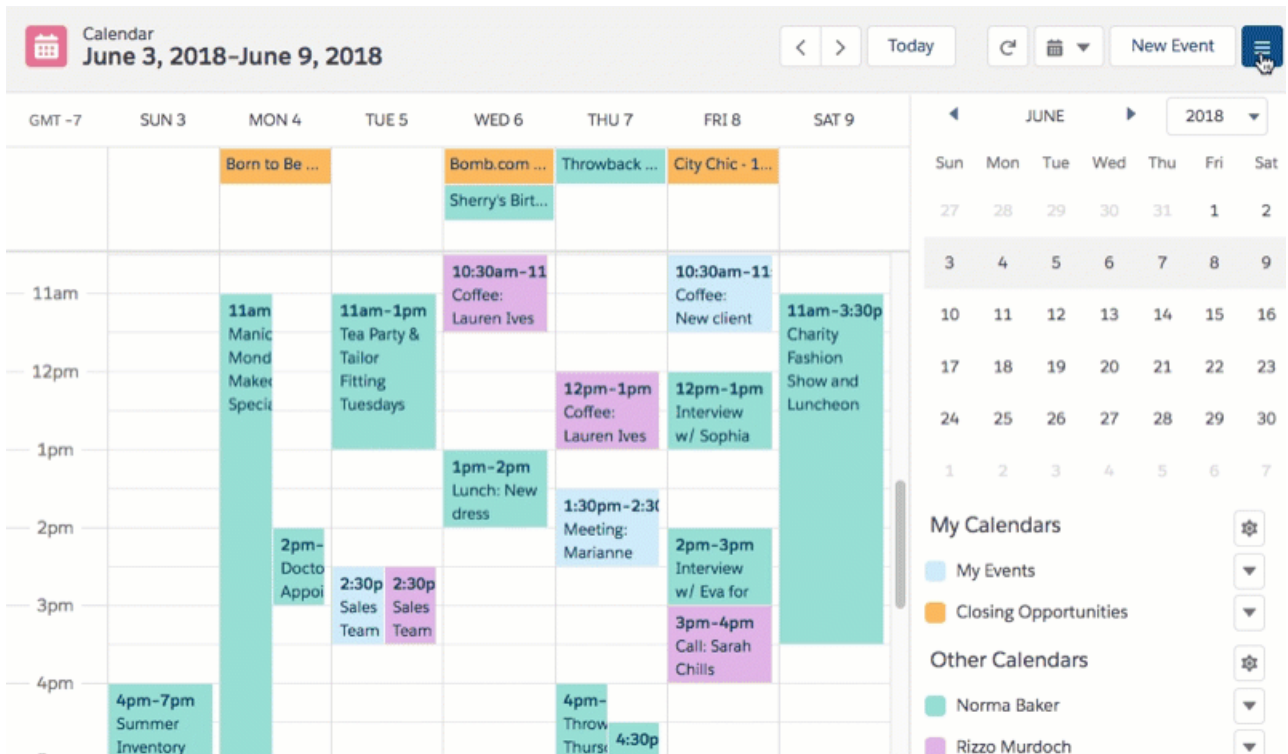
[IdeaExchange: Enable Drag and Drop Functionality for Lightning Calendar](#)

Enhance Your Calendar View in Lightning Experience

Hide the side panel details in your calendar for easier editing and viewing of event details, especially on devices with smaller screens.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: While the Calendar side panel includes helpful details and options, when screen space is limited, those details take up precious real estate. Now you can more easily make calendar changes on smaller devices or have a more focused view of your upcoming events.



Override the New Event Button on the Calendar in Lightning Experience

Customize the New Event action so that it's most relevant to your business process, and let your teams take that action directly from the calendar. You can make this possible using a custom Lightning component.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Override the New Event button with a Lightning component to customize the action's look and feel. For example, you can change interface elements that your teams interact with on the page. Users could select event locations from a map or a dropdown menu, instead of typing within a text field. Then your teams can see these customizations when they create events from the calendar in Lightning Experience.

There are some limitations for customizing New Event. For example, the Lightning component used for the override can only include standard Event fields. And team members who click a timeslot on the calendar still see the standard event action, not your customized action.

How: First, work with your developer to create a custom Lightning component that implements the right interfaces. Then in Setup, from the object management settings for Event, go to Buttons, Links, and Actions. From there, override the standard New Event button with your custom Lightning component.

If you've tried to override New Event before, verify where the button is pointing now. Though overrides weren't supported in the past, it was possible to edit button properties and save changes. Starting in Summer '18, any existing overrides to New Event become visible to teams in Lightning Experience.

SEE ALSO:


[Productivity Features: Lightning Experience Considerations](#)

[Summer '18 Features That Are Different or Not Available in the Salesforce App](#)

Sales Console: Pinned Sidebars, Lightning Console APIs, and More

We continue to roll out improvements to Lightning console apps that the Sales Console can use. We added the ability to pin record information in the left and right sidebars. We also added more methods to the Lightning Console Javascript API that were previously available only in Salesforce Classic.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer Editions with the Sales Cloud.

 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more.](#)

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

How: Check out the following new features available in the Sales Console.

Automate Tab Refresh, Change Nav Items, and Listen for Utility Item Clicks with New Lightning Console JavaScript APIs

We've been hard at work adding more methods to the Lightning Console JavaScript API. Some things that you could do with the Salesforce Console Integration Toolkit JavaScript APIs are now available in Lightning Experience. These methods are new in the Lightning Console JavaScript API: `focusNavigationItem()`, `getNavigationItems()`, `getSelectedNavigationItem()`, `refreshNavigationItem()`, `refreshTab()`, and `onUtilityClick()`.

Copy and Share Your Workspace and Active Subtab from the Address Bar

Agents, sales reps, and other console users can quickly share their workspace and active subtab by copying the URL directly from their address bar.

Open Custom Lightning Components in Workspace Tabs and Subtabs

No more worrying about URLs becoming out of date. Use `openTab()` and `openSubtab()` with the new `lightning:isURLAddressible` component to directly open custom Lightning components in your workspace.

Pin Right and Left Sidebars in Your Console App


A pinned region remains displayed as you navigate between subtabs in a Lightning console app. Last release, we gave you pinned region Lightning page templates. This release brings you another template. Customize your Lightning console app with the Console: Pinned Left and Right Sidebars template so that your users can view and work with record information in both sidebars.

New URL Format for Lightning Experience and the Salesforce Mobile App

It's official! There's a new URL format in town. When setting up pointers to areas in your org, take advantage of our shorter, easier-to-understand URLs.

Inbox: Email Insights and More Access to Activities Dashboard

Your inbox is even smarter with Einstein Email Insights. Plus, all Inbox users can view the activities dashboard.

 **Note:** Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

[Predict Priorities with Einstein Email Insights](#)

Spend less time in your inbox and more time winning your next deal with Einstein Email Insights. Einstein flags important emails in your inbox and provides recommendations on how to respond. This change applies to Salesforce Inbox on iOS and Android.

[Give All Inbox Users Access to the Activities Dashboard](#)

When you use Einstein Activity Capture through the Inbox license, all Inbox users get read-only access to the Activities dashboard. The Activities dashboard provides a summary of sales activities, including activities added with Einstein Activity Capture.

[Grow Your Network with Recommended Connections](#)

Let Einstein help sales reps find new business by showing important connections within their network. Then, they can email or view colleagues' profiles who have contacted the prospect to ask for insights or an introduction.

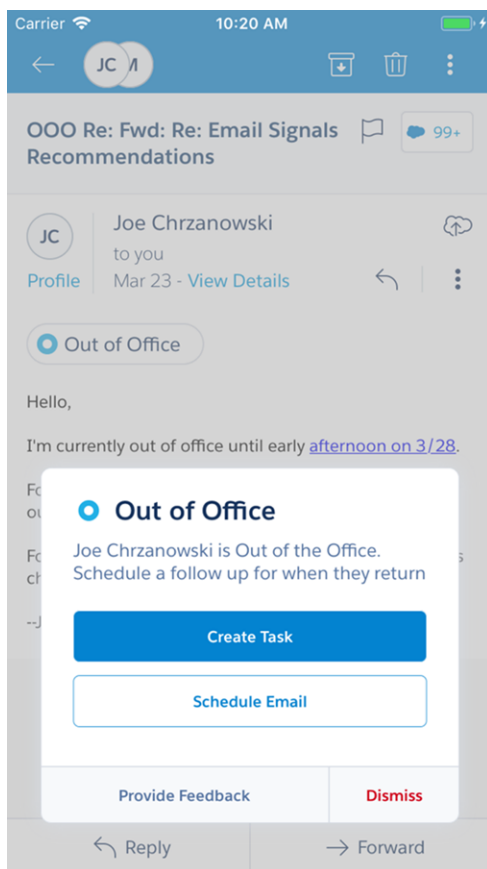
Predict Priorities with Einstein Email Insights

Spend less time in your inbox and more time winning your next deal with Einstein Email Insights. Einstein flags important emails in your inbox and provides recommendations on how to respond. This change applies to Salesforce Inbox on iOS and Android.

Where: This change applies to Lightning Experience and all versions of the Salesforce Inbox mobile app.

Why: There are four insights to help reps manage their email better than ever.

- **Executive Involved.** A customer sent you an email with a new executive-level decision maker copied.
- **Scheduling Intent.** You received an email with a call to action to schedule a meeting.
- **Pricing Mentioned.** Pricing was discussed in the subject or body of an email you received.
- **Out of Office.** Your point of contact is currently away, and you need to follow up with someone else.



How: When Einstein determines there's an email insight, a notification is shown at the top of the email. The sales rep taps on the insight to see a list of follow-up actions. For example, the rep can create a task or schedule an email when Einstein detects someone is out of the office.

Give All Inbox Users Access to the Activities Dashboard

When you use Einstein Activity Capture through the Inbox license, all Inbox users get read-only access to the Activities dashboard. The Activities dashboard provides a summary of sales activities, including activities added with Einstein Activity Capture.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

Who: Inbox users need the Access to View-Only Licensed Templates and Apps permission to see the Activities dashboard.

Why: Previously, if you used Einstein Activity Capture through an Inbox license, you could give access to the Activities dashboard to only five users. When you give other Inbox users read-only access to the dashboard, everyone gets a deeper understanding of their data.

How: If you're new to Inbox in Summer '18, the Access to View-Only Licensed Templates and Apps permission is already enabled within the Inbox with Einstein Activity Capture permission set. If you used Inbox prior to Summer '18, the Access to View-Only Licensed Templates and Apps permission is now included in the Inbox with Einstein Activity Capture permission set or your custom permission set. Just enable the permission. Then, sales reps click the **Activities Dashboard** tab to see the Activities dashboard.

Grow Your Network with Recommended Connections

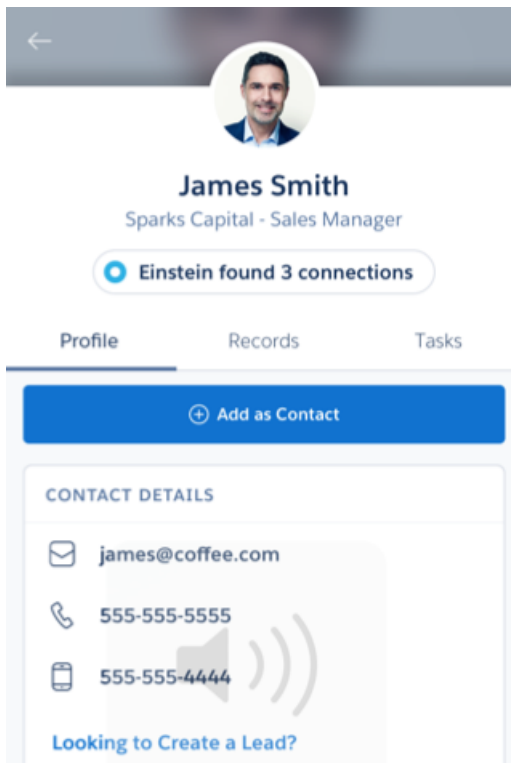
Let Einstein help sales reps find new business by showing important connections within their network. Then, they can email or view colleagues' profiles who have contacted the prospect to ask for insights or an introduction.

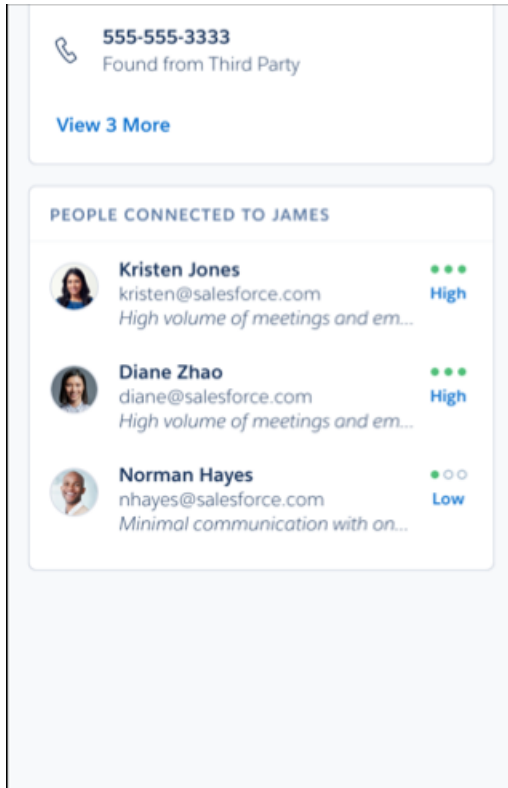
What: Einstein shows the strength of the connection and what's attributed to its strength. For example, a connection might be strong because there's been a lot of emails or meetings between the colleague and the prospect.

Where: This change applies to Inbox for iOS and Android.

Why: Prospects are more likely to open an email when you get introduced by someone you both know.

How: From the top of the contact card, sales reps click Einstein found new connections to see which of their colleagues has the strongest connection to the prospect. Then select a colleague to view their profile or send them an email.





Data Quality: Duplicate Management, Lightning Data

Identify duplicate records by running duplicate jobs on custom objects. And with Lightning Data, benefit from usability improvements, higher match rates, more accurate status, and currency conversion.

IN THIS SECTION:

[Duplicate Management: Run Duplicate Jobs on Custom Objects](#)

Duplicate jobs aren't just for accounts, contacts, and leads anymore. You can now run jobs on the custom objects you've created to support your business processes. Field-by-field comparison and merging of records aren't supported.

[Lightning Data: Clearer Labels, Field Mapping Control, Reviewed Status, Currency Conversion](#)

Your account managers will appreciate a clearer interface when they're checking records for data updates. You'll appreciate full control over field mapping for updating records, and everyone will be glad to rely on accurate data status for records. Get converted currency values with Lightning Data packages, and specify matches by vendor ID. Use a new match score setting to support key business decisions. And now your sales reps can see the number of remaining Lightning Data credits as they select companies to import.

Duplicate Management: Run Duplicate Jobs on Custom Objects

Duplicate jobs aren't just for accounts, contacts, and leads anymore. You can now run jobs on the custom objects you've created to support your business processes. Field-by-field comparison and merging of records aren't supported.

Where: This change applies to Lightning Experience in Performance and Unlimited editions.

SEE ALSO:

[Salesforce Help: Manage Duplicates Globally \(can be outdated or unavailable during release preview\)](#)

Lightning Data: Clearer Labels, Field Mapping Control, Reviewed Status, Currency Conversion

Your account managers will appreciate a clearer interface when they're checking records for data updates. You'll appreciate full control over field mapping for updating records, and everyone will be glad to rely on accurate data status for records. Get converted currency values with Lightning Data packages, and specify matches by vendor ID. Use a new match score setting to support key business decisions. And now your sales reps can see the number of remaining Lightning Data credits as they select companies to import.

IN THIS SECTION:

[Data Integration Labels Were Changed](#)

For the sake of clarity, labels in the flow for data integration rules were changed.

[Get More Control over the Field Mapping for Lightning Data Updates](#)

Is the data integration rule mapping for updating records missing a field that you want to update? Does the mapping include a field you want to leave alone? In certain Lightning Data packages, you can now add or remove mapped fields.

[Trust the Status of Records You've Reviewed](#)

When someone on your sales team declines new data from a third-party data service, the status of those records is changed to Reviewed. Now those records retain that status until someone updates them manually or the data service record becomes unavailable. Previously, the Reviewed status was changed back to Different whenever the data integration rule ran.

[Get Converted Currency Values in Lightning Data Records](#)

The economy is global. What about your data? Lightning Data packages now convert currency values from US dollars to the record currency. Any numerical field mapped to a currency type field is converted using the conversion rate you've defined when enabling multiple currencies.

[Specify Data Integration Rule Matches Using a Vendor's Unique ID](#)

Here's another way to control matches between Salesforce and data service records: by the vendor's unique ID, for example DUNS number for a Dun & Bradstreet package. When the ID field is populated with the ID, any existing match is overwritten.

[Support Key Decisions by Testing the Minimum Match Confidence Score in Lightning Data](#)

Understand your customers better—identify the data that best supports key decisions, such as sales segmentation. A new match confidence score setting in the rule settings for some Lightning Data packages is adjustable to control the precision of matches with your records. The data service provider sets a default score for each package. We recommend testing the default score before you activate a package rule.

[See Remaining Lightning Data Credits Before Importing Accounts](#)

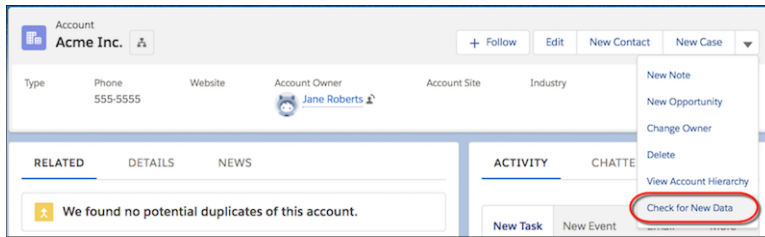
Now sales reps using Discover Companies can strategize more effectively as they select companies to import as accounts. As reps select companies to import, they see the number of Lightning Data credits remaining.

Data Integration Labels Were Changed

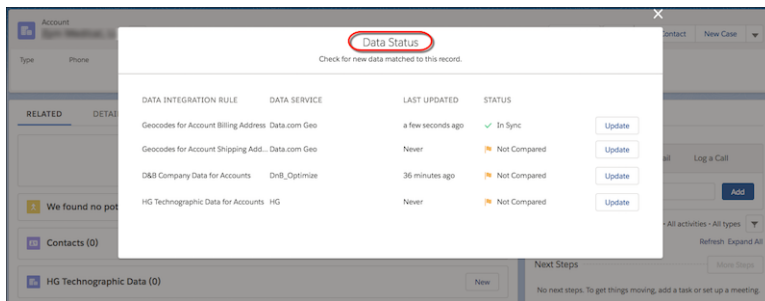
For the sake of clarity, labels in the flow for data integration rules were changed.

Where: These changes apply to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How:



On a record, the action Check Integration Status is now Check for New Data.



When a user clicks the action, the title of the dialog box that opens, Check Data Integration Status, is now Data Status.

SEE ALSO:

[Data Quality: Duplicate Management, Lightning Data](#)

Get More Control over the Field Mapping for Lightning Data Updates

Is the data integration rule mapping for updating records missing a field that you want to update? Does the mapping include a field you want to leave alone? In certain Lightning Data packages, you can now add or remove mapped fields.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions. This feature is available with Lightning Data packages that add a field to the standard object (the field is a lookup to the custom object).

How: In Setup, use the Quick Find box to find Data Integration Rules, and open a rule.

Click **Edit Field Mapping**, and then click the **Update** tab. Add or remove fields.

MATCH **UPDATE**

Select fields in Salesforce to update with data from the data service.

DATA SERVICE FIELDS	ACCOUNT FIELDS
Business Name	Account Name
Delisted Indicator	CompareName
Employee Count Here Reliability Desc	Shipping City
External ID	D&B D-U-N-S Number
Primary Address City	Billing City
Primary Address Country Code	Billing Country
Primary Address Postal Code	Billing Zip/Postal Code
Primary Address State Province	Billing State/Province

Add Field Cancel Save

SEE ALSO:

[Salesforce Help: Edit the Field Mapping for a Data Integration Rule \(can be outdated or unavailable during release preview\)](#)

Trust the Status of Records You've Reviewed

When someone on your sales team declines new data from a third-party data service, the status of those records is changed to Reviewed. Now those records retain that status until someone updates them manually or the data service record becomes unavailable. Previously, the Reviewed status was changed back to Different whenever the data integration rule ran.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

Get Converted Currency Values in Lightning Data Records

The economy is global. What about your data? Lightning Data packages now convert currency values from US dollars to the record currency. Any numerical field mapped to a currency type field is converted using the conversion rate you've defined when enabling multiple currencies.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

SEE ALSO:

[Salesforce Help: Things to Know About Data Integration Rules \(can be outdated or unavailable during release preview\)](#)

Specify Data Integration Rule Matches Using a Vendor's Unique ID

Here's another way to control matches between Salesforce and data service records: by the vendor's unique ID, for example DUNS number for a Dun & Bradstreet package. When the ID field is populated with the ID, any existing match is overwritten.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

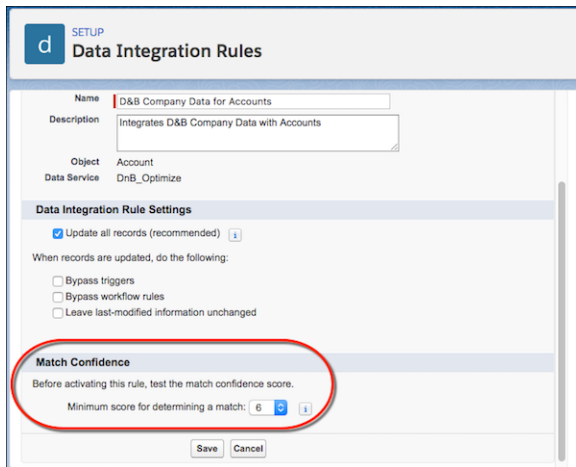
How: Add the vendor's ID field to the account, contact, or lead layout.

Support Key Decisions by Testing the Minimum Match Confidence Score in Lightning Data

Understand your customers better—identify the data that best supports key decisions, such as sales segmentation. A new match confidence score setting in the rule settings for some Lightning Data packages is adjustable to control the precision of matches with your records. The data service provider sets a default score for each package. We recommend testing the default score before you activate a package rule.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

How: Open a rule, click **Edit Rule Settings**, and find the Match Confidence setting.



You can test the setting in two ways.

- Run a data assessment on the rule. Adjust the setting, run another assessment, and then compare the match rates.
- Run the rule in your sandbox. Inspect the results to see whether you're getting the matches you expect. Clear out matches by refreshing the sandbox each time you run the rule, especially if you raise the minimum score.

Try starting with a high minimum score to get the most precise matches. From there, lower the score to broaden the possible matches.

An active rule applies the setting only when records are created and when it finds matches for records that weren't matched before Summer '18. Existing matches are retained, not overwritten.

SEE ALSO:

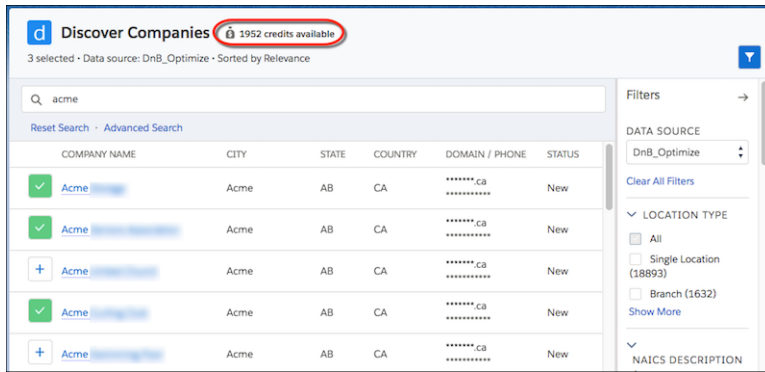
[Salesforce Help: Test the Match Confidence Score \(can be outdated or unavailable during release preview\)](#)

See Remaining Lightning Data Credits Before Importing Accounts

Now sales reps using Discover Companies can strategize more effectively as they select companies to import as accounts. As reps select companies to import, they see the number of Lightning Data credits remaining.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: The counter shows the remaining credits assigned to the sales rep or credits remaining for your org overall, whichever is less.



Lightning for Gmail: Focused Design and Email Logging Improvements

Get your reps working faster with Salesforce records in Gmail™ and Google Calendar™. The application features and Salesforce data are organized to maximize space and give easier access. The improved log email experience makes it easier to log emails to Salesforce records.

IN THIS SECTION:

[Focus on the Features You Need with Improved Design](#)

Lightning for Gmail's updated design organizes features and Salesforce data to maximize space, put features where you need them, and reduce the time spent scrolling to find what you need. Information is organized using tabs to show related Salesforce records, templates, and tasks.

[Log Emails to the Records That You Choose](#)

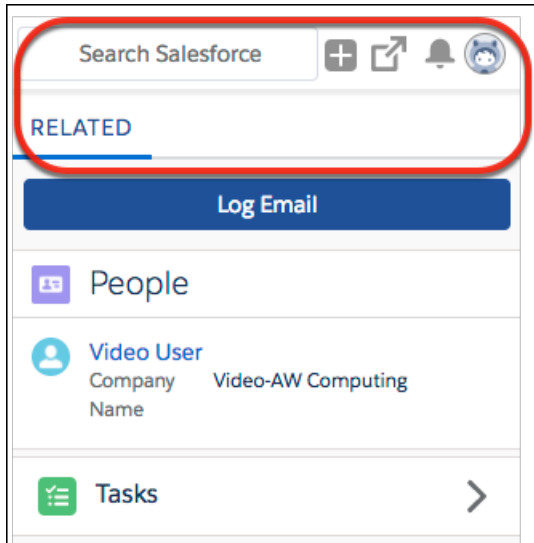
You've been able to log emails from Gmail to Salesforce before. The new log email flow is easier to access and lets sales reps select the people records to relate an email to. Plus, sales reps can select one other Salesforce record, such as an opportunity or lead to relate the email to.

Focus on the Features You Need with Improved Design

Lightning for Gmail's updated design organizes features and Salesforce data to maximize space, put features where you need them, and reduce the time spent scrolling to find what you need. Information is organized using tabs to show related Salesforce records, templates, and tasks.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: The navigation header is automatically added. If you're using the default email application pane, the tab layout is automatically applied. The default application pane contains only one tab. If you're using a custom email application pane, add tabs to your custom pane to take advantage of the feature.



SEE ALSO:

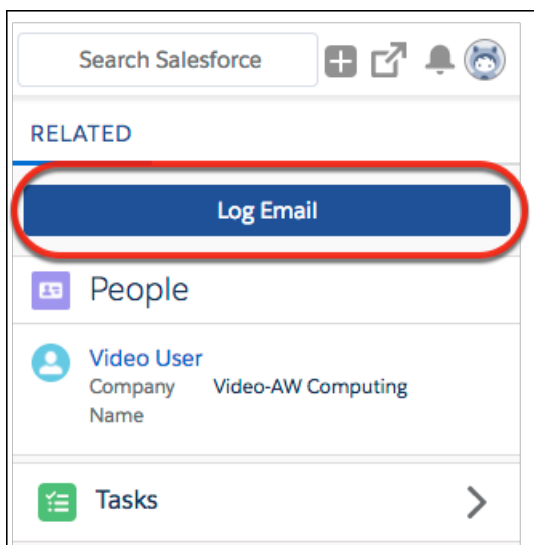
[Salesforce Help: Customize Lightning for Gmail for Your Sales Reps \(can be outdated or unavailable during release preview\)](#)

Log Emails to the Records That You Choose

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Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: Selecting the exact people and records to log an email to provides more flexibility when logging messages to Salesforce.



Microsoft® Integration: Focused Design, Email Logging Improvements, and Salesforce for Outlook Announcements

Get your reps working their Salesforce deals directly from Microsoft® Outlook®. Lightning for Outlook provides reps with an updated product design and improvements when logging emails. If you're still using Salesforce for Outlook, check out the latest bug fixes. If you're not using Salesforce for Outlook regularly, starting next release, the product won't be available to download or use. But that's okay: Lightning for Outlook and Lightning Sync are available to you and offer improved Microsoft integration features.

IN THIS SECTION:

[Lightning for Outlook: Focused Design and Email Logging Improvements](#)

Get your reps working faster in Microsoft® Outlook®. The application features and Salesforce data are organized to maximize space and give easier access. The improved log email experience makes it easier to log emails to Salesforce records.

[Salesforce for Outlook: Latest Upgrades and End of Sale in Winter '19](#)

To get our latest bug fixes, regular users can upgrade to Salesforce for Outlook v3.4.3. If you're not using Salesforce for Outlook regularly, starting in Winter '19, the product isn't available. But don't worry, it's not a loss! Instead, take advantage of enhanced functionality and effortless upgrades with Lightning for Outlook and Lightning Sync.

Lightning for Outlook: Focused Design and Email Logging Improvements

Get your reps working faster in Microsoft® Outlook®. The application features and Salesforce data are organized to maximize space and give easier access. The improved log email experience makes it easier to log emails to Salesforce records.

IN THIS SECTION:

[Focus on the Features You Need with Improved Design](#)

Lightning for Outlook's updated design organizes features and data to maximize space and puts features where you need them. Information is organized using tabs to show related Salesforce records, manage tasks, and use templates. Global tools, such as adding a record, are always available in the new navigation toolbar.

[Log Emails to the Records That You Choose](#)

You've been able to log emails from Microsoft® Outlook® to Salesforce before. The new log email flow is easier to access and lets sales reps select the people records to relate an email to. Plus, sales reps can select one other Salesforce record, such as an opportunity or lead to relate the email to.

[Increase Productivity with Inbox Beta for Outlook \(Beta\)](#)

Inbox Beta for Outlook brings together the best features of Lightning for Outlook and Salesforce Inbox in one solution. It includes all the features of the free version of Lightning for Outlook, plus features to increase sales productivity while working in email.

[Use New Components to Build Custom Email Application Panes](#)

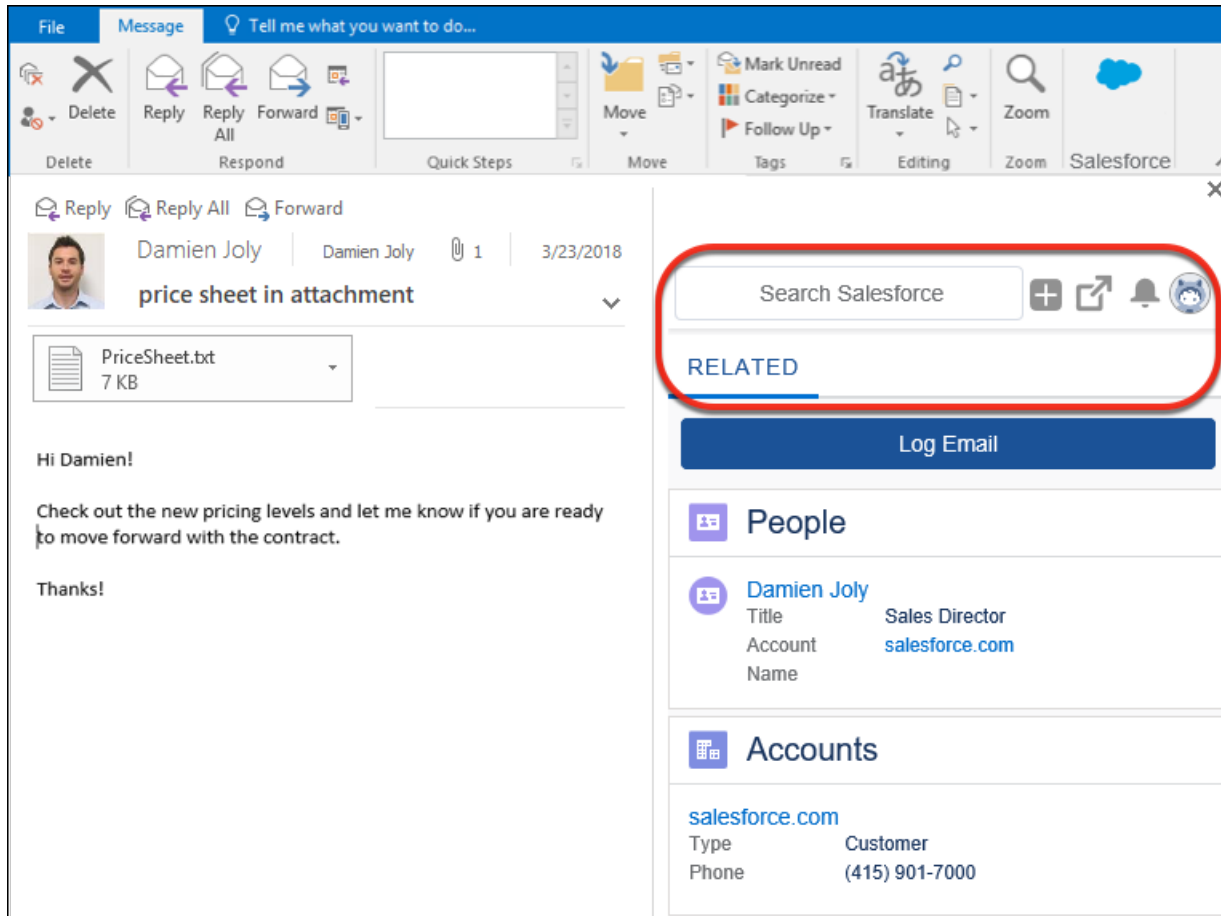
Create custom email application panes so that Lightning for Outlook and Inbox Beta for Outlook fit how your reps work. An array of new Lightning App Builder components gives your reps the flexibility they need when working with Salesforce data in Microsoft® Outlook®.

Focus on the Features You Need with Improved Design

Lightning for Outlook's updated design organizes features and data to maximize space and puts features where you need them. Information is organized using tabs to show related Salesforce records, manage tasks, and use templates. Global tools, such as adding a record, are always available in the new navigation toolbar.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The updated application design provides the information and features you need at the right time. No more searching through long lists of information to find what you need.



How: Lightning for Outlook automatically applies the navigation header. If you're using the default email application pane, you'll also see the default tab layout. If you're using a custom email application pane, add tabs to your custom pane to take advantage of the feature.

SEE ALSO:

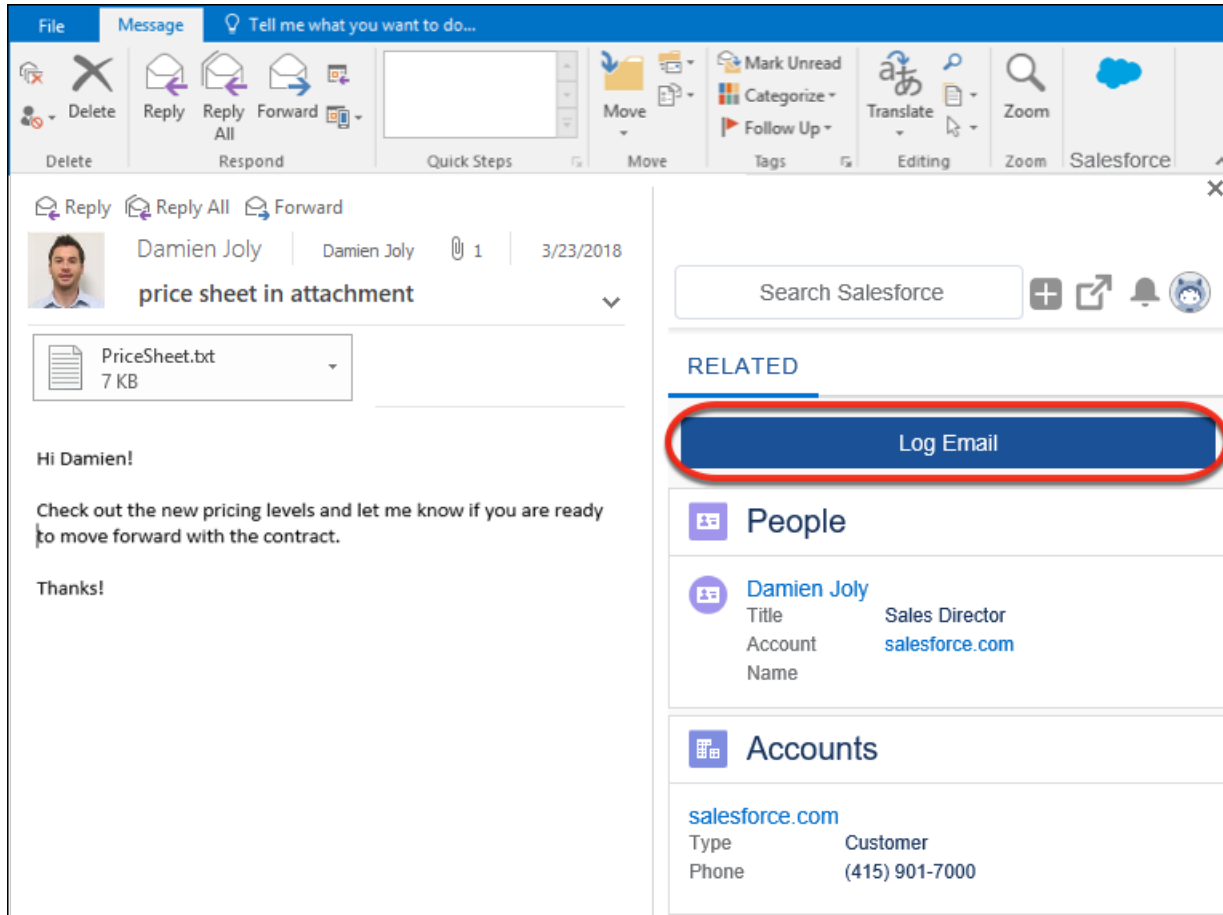
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Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The Log Email option is always available while reading and composing emails, making access easier. Selecting the exact people and records to log an email to provides more flexibility when logging messages to Salesforce.



SEE ALSO:

[Salesforce Help: Customize Lightning for Outlook for Your Sales Reps \(can be outdated or unavailable during release preview\)](#)

Increase Productivity with Inbox Beta for Outlook (Beta)

Inbox Beta for Outlook brings together the best features of Lightning for Outlook and Salesforce Inbox in one solution. It includes all the features of the free version of Lightning for Outlook, plus features to increase sales productivity while working in email.

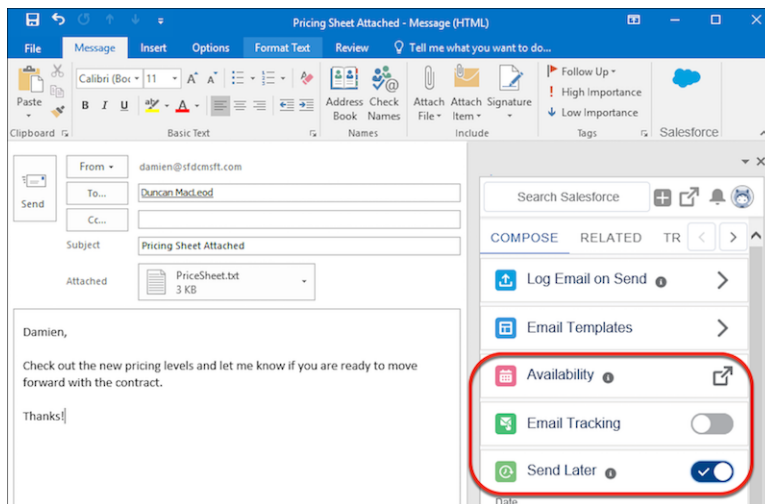
Where: Available for an extra cost in Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Note: As a beta feature, Inbox Beta for Outlook is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Inbox Beta for Outlook in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Who: Inbox Beta for Outlook is available to users with an Inbox license who have the Lightning for Outlook add-in installed and running in Microsoft Outlook.

Why: Using Inbox Beta for Outlook features, sales reps can be even more productive.

- **More suggestions for related Salesforce objects.** Lightning for Outlook suggests accounts, opportunities, and cases that match addresses on emails and events. In Inbox Beta for Outlook, admins can also set custom objects to include in the suggested list of matching records.
- **See who's reading your emails.** Set an email to be tracked so you know when it was read and whether any included links were clicked. No more guessing about when it's time to follow up and whether your prospects are engaged.
- **Schedule emails to send later.** Timing is everything. Write an email and schedule it to send at a specific date and time. Scheduling emails is especially useful when sales reps work different hours than their customers and prospects. They can now make sure that their message is received at the most strategic time.
- **Insert your meeting availability.** Avoid back and forth emails when scheduling meetings. Sales reps insert open slots from their calendar directly into the body of an email. Recipients can click an available option to book the time.



How: An Inbox license is required to run Inbox Beta for Outlook. If you are using Lightning for Outlook, contact your Salesforce representative to purchase Inbox. To move to Inbox Beta for Outlook from Salesforce Inbox, each sales rep needs the Lightning for Outlook add-in instead of the Inbox add-in.

In both cases, enable Lightning for Outlook with the Inbox Beta for Outlook option turned on. Assign each sales rep who needs access the Inbox With Einstein Activity Capture or the Inbox Without Einstein Activity Capture permission set, depending on your Einstein Activity Capture setup.

SEE ALSO:

[Salesforce Help: Select Who Can Use Inbox Beta for Outlook Features \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Use New Components to Build Custom Email Application Panes

Create custom email application panes so that Lightning for Outlook and Inbox Beta for Outlook fit how your reps work. An array of new Lightning App Builder components gives your reps the flexibility they need when working with Salesforce data in Microsoft® Outlook®.

Where: Available in Lightning Experience in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: In Lightning App Builder, create an email application pane and add the relevant components. Organize the components in the pane to best suit how your reps work.

- **Log Email.** Inserts the Log Email button, which launches the log email flow. If you use Einstein Activity Capture, this component provides email sharing options.
- **Tabs.** Organizes components and lets you select which one appears by default when reading or composing emails.

- **Accounts, Opportunities, and More.** Shows accounts, opportunities, and cases related to an email recipient or event participant. If your company uses Inbox Beta for Outlook, this component also shows related custom object records.
- **Availability.** Inserts open time slots from the sales rep's calendar directly in an email. Available in Inbox Beta for Outlook.
- **Email Tracking - Compose.** Adds an option to track when email is opened or links in an email are clicked. To see the tracking results, add the Email Tracking - List component. Available in Inbox Beta for Outlook.
- **Email Tracking - List.** Shows when an email was opened or a link in an email was clicked. To track an email, add the Email Tracking - Compose component. Available in Inbox Beta for Outlook.
- **Send Later - Compose.** Adds a scheduling option when composing emails. To make edits to the send time and date, add the Send Later - Pending List component. Available in Inbox Beta for Outlook.
- **Send Later - Pending List.** Shows a list of emails that are scheduled to send later. You can also edit the scheduled date and time or delete a scheduled email. To schedule an email, add the Send Later - Compose component. Available in Inbox Beta for Outlook.

SEE ALSO:

[Increase Productivity with Inbox Beta for Outlook \(Beta\)](#)

[Salesforce Help: Customize Lightning for Outlook for Your Sales Reps \(can be outdated or unavailable during release preview\)](#)

Salesforce for Outlook: Latest Upgrades and End of Sale in Winter '19

To get our latest bug fixes, regular users can upgrade to Salesforce for Outlook v3.4.3. If you're not using Salesforce for Outlook regularly, starting in Winter '19, the product isn't available. But don't worry, it's not a loss! Instead, take advantage of enhanced functionality and effortless upgrades with Lightning for Outlook and Lightning Sync.

IN THIS SECTION:

[Upgrade to Salesforce for Outlook v3.4.3](#)

To get our latest bug fixes, regular users can upgrade to Salesforce for Outlook v3.4.3.

[Salesforce for Outlook Not for Sale in Winter '19](#)

Starting in Winter '19, if you've never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. And because this rodeo isn't our first, we introduced significant improvements for integrating with Microsoft.

Upgrade to Salesforce for Outlook v3.4.3

To get our latest bug fixes, regular users can upgrade to Salesforce for Outlook v3.4.3.

Where: This change applies to Salesforce Classic and Lightning Experience in Group, Contact Manager, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Check the product-specific Salesforce for Outlook release notes for details on available bug fixes.

SEE ALSO:

[Salesforce Trailblazer Community: Salesforce for Outlook Release Notes v3.4.3 \(can be outdated or unavailable during release preview\)](#)

[Trailhead: Learn About the Move from Salesforce for Outlook \(can be outdated or unavailable during release preview\)](#)

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Starting in Winter '19, if you've never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. And because this rodeo isn't our first, we introduced significant improvements for integrating with Microsoft.

Where: This change applies to Salesforce Classic and Lightning Experience in Group, Contact Manager, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: If you never set up Salesforce for Outlook, new users can no longer download the installable client from Salesforce. Users who downloaded the product in the past but aren't regularly logging in can no longer connect. In addition, as the Salesforce admin, you can't access previously created Outlook configurations or create new ones.

If you have Salesforce for Outlook users who log in regularly, service continues as usual: Those users can download the latest client, and admins can create and edit Outlook configurations.

Why: Lightning for Outlook and Lightning Sync make your job easier and your reps more productive. Reps can do the same great things they did with Salesforce for Outlook, but our latest products are better because they:

- Simplify the administrative process. Manual upgrades aren't required like they were with Salesforce for Outlook. Whenever we roll out product updates, you get them automatically, much like the Salesforce releases you get three times a year.
- Are available whether your users are working in Salesforce Classic or Lightning Experience.
- Are compatible with the latest applications that Microsoft offers, so you don't need to worry about future compatibility.
- Offer our most innovative features yet: custom layouts for different users, improved email experience, and end-to-end control of users' sync experience to save them from fussing with settings.

How: Check out Trailhead and Salesforce Help for setup instructions.

SEE ALSO:

[Trailhead: Outlook Integration \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning for Outlook System Requirements \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning Sync System Requirements \(can be outdated or unavailable during release preview\)](#)

Salesforce CPQ and Billing

Deliver quotes, proposals, and contracts quickly and accurately. Automate billing and payment processes with flexible tools and terms. Salesforce CPQ and Billing offer an end-to-end solution for creating quotes, closing deals, settling invoices, and reporting revenue.

IN THIS SECTION:

[Salesforce CPQ: Booking Reports, Faster Order Creation, and Enhanced Quote Line Editor Navigation](#)

Report on bookings, generate faster orders with fewer price schedules, and navigate quote line editor fields more easily with improved tools and functionality.


[Salesforce Billing: New Revenue Agreements](#)

Get better visibility into your revenue obligations across bookings and billings with revenue agreements.

Salesforce CPQ: Booking Reports, Faster Order Creation, and Enhanced Quote Line Editor Navigation

Report on bookings, generate faster orders with fewer price schedules, and navigate quote line editor fields more easily with improved tools and functionality.

 **Note:** Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

 **Important:** Starting in Salesforce CPQ 214 (Summer '18), users are auto-upgraded to major CPQ patches and releases. This change applies to both new and existing customers.

IN THIS SECTION:

[Set Up Salesforce CPQ Summer '18](#)

After installing Salesforce CPQ Summer '18, set up new features and layout changes in your org.

[Generate Accurate Revenue Reports with Bookings](#)

We've added fields to orders and order products so that your company can report on bookings that exclude evergreen subscriptions on order products. Specify which order products are included or excluded from bookings and see the order product's calculated bookings amount and total price.

[Optimize Invoice and Revenue Workflows with Fewer Steps](#)

The Revised Order Product and Contract Action fields are now completed on the order product when the order product is activated. Now, you can combine invoice lines and generate revenue schedules for amendments without running the contracting process.

[Create Orders Faster with Fewer Price Schedules](#)

We've streamlined the order creation process by reducing unnecessary price schedule creation. Now, we create price schedules for only usage-based order products.

[Goodbye, Subscription Conversion and Full-Term Net Unit Price Fields](#)

The order's Subscription Conversion field is now deprecated. The order product's Full-Term Net Unit Price field is also deprecated. We're evaluating some new options for supporting a broader range of business needs.

[Quickly Navigate the Quote Line Editor](#)

It's easier to get around the quote line editor. Click a field cell to focus on it, then use your arrow keys or the tab key to move to other cells. You can also click the pencil icon next to a field cell when you're ready to edit it. Also experience improved performance with lower load and calculation times.

[Other Changes in Salesforce CPQ](#)

Learn about other changes we've made to merge fields and percent of total order products, and validations in our new order service.

Set Up Salesforce CPQ Summer '18

After installing Salesforce CPQ Summer '18, set up new features and layout changes in your org.

Once you've received your Salesforce CPQ package installation link, follow the steps in [Install Salesforce CPQ](#). Then, use the following steps to get Salesforce CPQ up and running with CPQ Summer '18 features and changes.

1. Remove the Subscription Conversion field from the contract page layout.
2. Add the Order Bookings field to the order page layout.
3. Add the following picklist value to the order field Price Calculation Status.
 - Value: Not Needed
 - API Name: Not Needed

Generate Accurate Revenue Reports with Bookings

We've added fields to orders and order products so that your company can report on bookings that exclude evergreen subscriptions on order products. Specify which order products are included or excluded from bookings and see the order product's calculated bookings amount and total price.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Who: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

How: The process to add the fields to your page layout is the same for order and order products. For example, to add the Order Bookings field, find the page layout for Orders.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**. Next, click **Order**, and then scroll to the **Page Layouts** section.
- If you're using Salesforce Classic, from Setup, in the Quick Find box, enter *Orders*, and then select **Page Layouts**.

Next to CPQ Order Layout, click **Edit**. From the top panel, enter *Order Bookings* into the Quick Find box. Drag the field to an empty section, then save your changes.

Once enabled, all your revenue specialists have to do is set the Bookings Indicator field according to your reporting requirements.

Optimize Invoice and Revenue Workflows with Fewer Steps

The Revised Order Product and Contract Action fields are now completed on the order product when the order product is activated. Now, you can combine invoice lines and generate revenue schedules for amendments without running the contracting process.

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Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce CPQ editions.

Who: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

-  **Note:** The quote line editor performance enhancement does not support table row theming. If this is an issue for your org, contact CPQ support to disable the enhancement. We'll let you know once table row theming is available again. We can't guarantee

general availability of table row theming in the performance enhancements feature within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Other Changes in Salesforce CPQ

Learn about other changes we've made to merge fields and percent of total order products, and validations in our new order service.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Who: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

[Order Service Validations Added](#)

We've introduced a new Order Service with Salesforce CPQ Summer '18. The order service contains new and modified validations that help you scale your business and improve performance.

[Show Picklist Value Label on Merge Field](#)

When you associate a merge field with a picklist value, the merge field now shows the value's label instead of its API name in generated documents.

[Improved Workflow for Percent of Total Order Products](#)

We've made changes to the way covered products are calculated. Instead of users manually adding percent of total order products to their orders, we now automatically calculate it for selected products. If the percent of total quote lines contain more than one quantity, they are converted into an order product with one quantity. We use the percent of total quantity as a multiplier for unit price calculation. The ordered quantity field will hold the quoted quantity amount in a separate field. The ordered quantity field will hold the quoted quantity amount. Note that the quoted quantity can't be adjusted for partial quantities on partial orders.

[Price Book Entry ID Added to Quote Lines](#)

We changed the way Salesforce CPQ creates lookups from products to order products when you order a quote. The quote line now contains a Pricebook Entry ID field. When you add a product to a quote and save, the resulting quote line inherits its pricebook entry ID from the product's pricebook entry ID. When you order the quote, your order products inherit their pricebook entry IDs from their quote lines.

Order Service Validations Added

We've introduced a new Order Service with Salesforce CPQ Summer '18. The order service contains new and modified validations that help you scale your business and improve performance.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Who: Salesforce CPQ is offered at an extra cost. For pricing, contact your Salesforce account executive.

How: Let's look at a few important changes.

- You can contract an order product before Salesforce CPQ has finished the order price calculation.
- You can't update an order's start and end dates at the same time.
- Order generation now supports creating an order from a quote with more than 150 lines.
- An order product must have the same term length as its parent quote line.

SEE ALSO:

[Knowledge Article: New Order Service introduced in Salesforce CPQ Summer '18 Release](#)

Show Picklist Value Label on Merge Field

When you associate a merge field with a picklist value, the merge field now shows the value's label instead of its API name in generated documents.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

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Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Who: Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

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Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce CPQ editions.


How: When you upgrade to Salesforce CPQ Summer '18, Salesforce CPQ provides a pricebook entry ID for all your quote lines. From then on, Salesforce CPQ provides pricebook entry IDs to your quote lines as part of the quoting process.

Pricebook entry ID has an API name of `SBQQ__PricebookEntryID__c`. You can add the field to your quote line page layout for reference. However, to prevent data errors, don't change pricebook entry ID's value.

Salesforce Billing: New Revenue Agreements

Get better visibility into your revenue obligations across bookings and billings with revenue agreements.

 **Note:** You need to have Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

 **Important:** When installing the latest update to Salesforce Billing, we strongly recommend that you post or cancel all draft invoices before you begin the process. If you install Salesforce Billing and then post an invoice that was drafted before installation, you will experience errors with future invoices from related orders. These errors occur because Salesforce Billing Winter '18 (and later) updates order product dates related to the next billing date when an invoice is posted.

IN THIS SECTION:

[Use Revenue Agreements to Group Revenue Schedules](#)

Revenue agreements line up related revenue schedules to give you better visibility into your overall revenue obligations for a contract or order. By grouping revenue schedules, you can track an obligation across bookings (order products) and billings (invoice lines, credit note lines, and debit note lines).

Use Revenue Agreements to Group Revenue Schedules

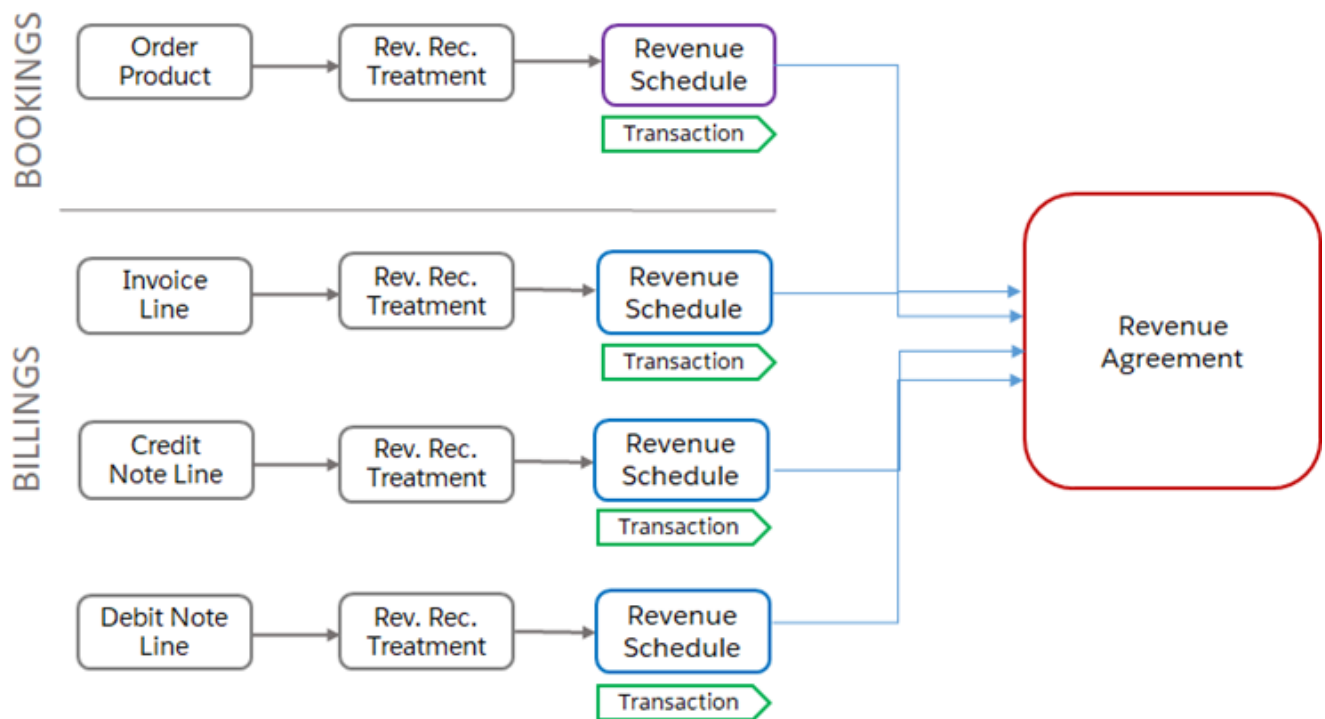
Revenue agreements line up related revenue schedules to give you better visibility into your overall revenue obligations for a contract or order. By grouping revenue schedules, you can track an obligation across bookings (order products) and billings (invoice lines, credit note lines, and debit note lines).

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce Billing editions.

Who: You need to have Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

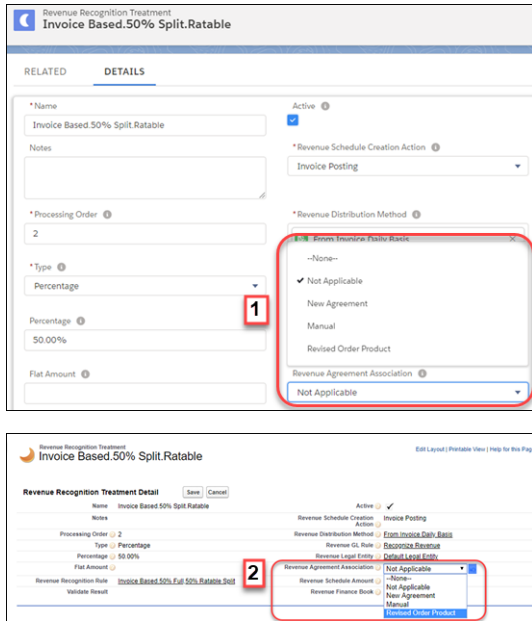
Why: Subscriptions and service-based order products can change over time. Credits, debits, and cancellations all affect the original contract or service. When you amend an order or contract, your net bookings and billings change, resulting in multiple revenue schedules. The more changes you make, the more revenue schedules you have, which can make it difficult to assess your total bookings and billings.

Revenue agreements group revenue schedules that are related to the original order, providing an aggregate view of how much revenue you have and what's recognized.



How: Create a revenue agreement to set up your own grouping. We recommend grouping by revenue obligation, but you can group revenue schedules however you want.

To get started, select an option under Revenue Agreement Association on the Revenue Recognition Treatment details page in Lightning Experience (1) or Salesforce Classic (2).



Pardot: Permanent Deletion of Prospects, Responsive Layouts, Preview As, Repeating Engagement Programs, and More Goodies

Permanently delete prospects from the recycle bin, insert Salesforce files in Engage emails, use new prebuilt layouts to create responsive landing pages, and get better match rates when you use the Matched Leads component. Plus, preview emails as specific prospects and let prospects flow through engagement programs more than once.

IN THIS SECTION:

[Permanently Delete Prospects](#)

Honor your customers' requests to permanently remove their personal data from Pardot. Before, when you deleted prospects, Pardot archived them in the recycle bin without the option to permanently delete them.

[Changes to How Pardot Treats Prospects in the Recycle Bin](#)

We've changed how the recycle bin works to help you with your efforts around data protection and privacy regulations, such as the General Data Protection Regulation (GDPR). Pardot no longer tracks prospects that are archived in the recycle bin, and prospects are only automatically restored if they submit a form.

[Align Sales and Marketing on a Single Platform with Pardot for Lightning \(Beta\)](#)

The Pardot for Lightning app helps your Pardot users be more productive by keeping them in Salesforce. The app is no longer a single tab, so gone are the days of using Pardot in a separate window and duplicated menus with confusing navigation. The app has all-new navigation and layout tailored for Lightning Experience.

[Use Responsive Layouts for Landing Pages](#)

Gone are the days of manually coding responsive layout templates in Pardot. We now offer responsive prebuilt layouts that you can edit to suit your brand's look and feel. Import one of five prebuilt layouts, customize it, and then use it again to style your landing pages. You can also preview templates, so you can be confident about your design before publishing your template.

[Personalize Engage Emails with Salesforce Files](#)

Increase prospect engagement by customizing Engage emails with Salesforce files. Now you can upload and select Salesforce files from the Engage Campaigns editor.

[Configure New Options for Salesforce Engage](#)

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If you use the Matched Leads component and your accounts have low coverage on the Website field, you now get better match rates. When an account has no value for Website, the standard matching rule for leads on accounts scans the account's top contacts. The rule aggregates the email suffixes on those contacts to match the email suffix on the lead.

[See Fewer False Positives for Leads Matched to Accounts](#)

When you use the Matched Leads component, you no longer get matches based on personal email addresses. The standard matching rule for leads on accounts now ignores email addresses ending in widely used domains such as gmail.com and yahoo.com.

[Let Prospects Repeat Engagement Programs \(Beta\)](#)

Sometimes a prospect doesn't bite the first time around, or you need to resend recurring marketing content, such as renewals or seasonal offers. Now you can set up engagement programs that allow prospects to flow through the program as many times as you want.

[Preview Emails as a Specific Prospect](#)

It can be nerve-racking to send highly personalized emails because they use dynamic merge tags instead of plain language. And personalization can get complex quickly. If you ever wondered exactly how an email looks after the dynamic information is rendered, try the Preview As tool. Each time you build an email, head over to the Preview tab and click **Preview As** to see how your content looks to specific people on your list.

[Have Some Fun with Emoji in Emails](#)

Your business sells cool stuff, right? Sometimes you want to have a little fun in your email marketing content. A friendly smile or a shining star might be just the thing you need! Try the emoji picker for email subject lines and body copy to spice things up.

[Engagement Studio Offers Pointers](#)

Editing engagement programs in a hurry? If we notice certain issues, we'll pop up a quick note to say "Hey, you might want to review that change." These include scheduling on a date in the past or outside of business hours. We'll also let you know if you're reusing an email template and the account settings don't allow it. If all is well, just ignore the message. Or review the step to ensure that prospects get the info they need.

[Twitter Changes Posting Policy](#)

Of course, you can still post marketing content from Pardot to your social networks! But due to some changes in Twitter's policies, similar content can't be posted to multiple accounts simultaneously. When you make a social post, you're now limited to using one Twitter account at a time.

[Use Pardot in French, German, and EU Spanish \(Beta\)](#)

We've localized the Pardot UI for France, Germany, and Spain. Localization is in beta release, and is available to all customers.

[Pardot Help Site Migration Is Complete](#)

We migrated Pardot's help site to Salesforce Help to improve the overall content experience for users. We refreshed the content and retired out-of-date information. No action is required on your part. We also redirected help.pardot.com to get you to the new site.

Permanently Delete Prospects

Honor your customers' requests to permanently remove their personal data from Pardot. Before, when you deleted prospects, Pardot archived them in the recycle bin without the option to permanently delete them.

Where: This change applies to all Pardot editions.

Who: Pardot admin users can permanently delete prospects.

Why: Whether you receive a data deletion request or want to clean up your account, you can now permanently remove all traces of a prospect from Pardot. Permanent deletion of prospects is important, especially if you're concerned with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR).

How: This feature is automatically enabled in all Pardot accounts. From the recycle bin, you can delete individual prospects, or in bulk using a table action.

SEE ALSO:

[Salesforce Help: Deleting and Undeleting Prospects \(can be outdated or unavailable during release preview\)](#)

Changes to How Pardot Treats Prospects in the Recycle Bin


We've changed how the recycle bin works to help you with your efforts around data protection and privacy regulations, such as the General Data Protection Regulation (GDPR). Pardot no longer tracks prospects that are archived in the recycle bin, and prospects are only automatically restored if they submit a form.

Where: This change applies to all Pardot editions.

Align Sales and Marketing on a Single Platform with Pardot for Lightning (Beta)

The Pardot for Lightning app helps your Pardot users be more productive by keeping them in Salesforce. The app is no longer a single tab, so gone are the days of using Pardot in a separate window and duplicated menus with confusing navigation. The app has all-new navigation and layout tailored for Lightning Experience.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions with Pardot.

 **Note:** As a beta feature, Pardot for Lightning is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: This feature is available to Salesforce users with the Allow access to all Pardot features permission who are mapped to a Pardot user.

How: Salesforce admins must enable this feature. From Setup, enter *Pardot* in search, then click **Get Started**. Enable the app. Then, add the **Allow access to all Pardot features** app permission to a permission set that's assigned to all users who need access to the app. After the app is enabled, it appears in the App Launcher for all users who have the app permission assigned.

Use Responsive Layouts for Landing Pages

Gone are the days of manually coding responsive layout templates in Pardot. We now offer responsive prebuilt layouts that you can edit to suit your brand's look and feel. Import one of five prebuilt layouts, customize it, and then use it again to style your landing pages. You can also preview templates, so you can be confident about your design before publishing your template.

Where: This change applies to all Pardot editions.

How: Don't worry, you don't have to do anything! This feature is enabled in all Pardot accounts. While editing a layout template, select a layout from the Import Layout dropdown menu and click **Import Now**. Then use the HTML editor to customize the layout.

Personalize Engage Emails with Salesforce Files

Increase prospect engagement by customizing Engage emails with Salesforce files. Now you can upload and select Salesforce files from the Engage Campaigns editor.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

Who: This feature is available to users with a Salesforce Engage license.

How: Enable Content Deliveries and Public Links for users. Then sales reps upload a file or choose a Salesforce file. A public link to the file, which is styled to look like an attachment, is added to the message. Reps can also insert an inline image into the email. Files that reps upload to the Engage Campaigns editor are saved to the Salesforce library. Because of API limitations, users in Professional edition can't upload files from the Engage email editor, but they can choose a Salesforce file.

SEE ALSO:

[Salesforce Help: Set up Content Deliveries \(can be outdated or unavailable during release preview\)](#)

Configure New Options for Salesforce Engage

Pardot admins can now control whether users can send tracked emails from Engage for Gmail or send 1:1 Engage Campaigns to opted-out prospects.

Where: This change applies to all Pardot editions.

How: On your Pardot account settings page, expand the Salesforce Engage section and configure the settings.

Match Leads to Accounts Without a Website Value

If you use the Matched Leads component and your accounts have low coverage on the Website field, you now get better match rates. When an account has no value for Website, the standard matching rule for leads on accounts scans the account's top contacts. The rule aggregates the email suffixes on those contacts to match the email suffix on the lead.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions with Pardot Pro or Pardot Ultimate edition.

SEE ALSO:

[Salesforce Help: Standard Matching Rule for Leads on Accounts \(can be outdated or unavailable during release preview\)](#)

[Pardot Pricing](#)

See Fewer False Positives for Leads Matched to Accounts

When you use the Matched Leads component, you no longer get matches based on personal email addresses. The standard matching rule for leads on accounts now ignores email addresses ending in widely used domains such as gmail.com and yahoo.com.

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Let Prospects Repeat Engagement Programs (Beta)

Sometimes a prospect doesn't bite the first time around, or you need to resend recurring marketing content, such as renewals or seasonal offers. Now you can set up engagement programs that allow prospects to flow through the program as many times as you want.

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Who: Users with Pardot Administrator and Marketing roles and users with the Create permission in Engagement Studio can enable this setting.

How: Create a program in Engagement Studio, or choose one that hasn't been sent yet. On the Start card, select **Allow prospects to reenter a program**. If an engagement program is running, you can't enable this feature.

Preview Emails as a Specific Prospect


It can be nerve-wracking to send highly personalized emails because they use dynamic merge tags instead of plain language. And personalization can get complex quickly. If you ever wondered exactly how an email looks after the dynamic information is rendered, try the Preview As tool. Each time you build an email, head over to the Preview tab and click **Preview As** to see how your content looks to specific people on your list.

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Have Some Fun with Emoji in Emails

Your business sells cool stuff, right? Sometimes you want to have a little fun in your email marketing content. A friendly smile or a shining star might be just the thing you need! Try the emoji picker for email subject lines and body copy to spice things up.

Where: This change applies to all Pardot editions.

How: In the Advanced Subject Composer or on the email editor toolbar, click the , and choose the emoji you want to use. Preview and test your emails to make sure that they appear as expected in different email clients.

Engagement Studio Offers Pointers

Editing engagement programs in a hurry? If we notice certain issues, we'll pop up a quick note to say "Hey, you might want to review that change." These include scheduling on a date in the past or outside of business hours. We'll also let you know if you're reusing an email template and the account settings don't allow it. If all is well, just ignore the message. Or review the step to ensure that prospects get the info they need.

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We've localized the Pardot UI for France, Germany, and Spain. Localization in beta release, and is available to all customers.

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How: Users change their locale and language settings by editing their profile. Pardot admins change the default language and locale from the account settings page. In accounts with Salesforce User Sync, matching language settings for users are inherited from Salesforce.

SEE ALSO:

[Salesforce Help: Pardot for Lightning \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Pardot Help Site Migration Is Complete

We migrated Pardot's help site to Salesforce Help to improve the overall content experience for users. We refreshed the content and retired out-of-date information. No action is required on your part. We also redirected help.pardot.com to get you to the new site.

Other Changes in the Sales Cloud

Filter account list views by territory in Lightning Experience. Event subjects display below event times in Calendar. And organizer, attendee, and attendee status fields are no longer exported with events.

IN THIS SECTION:

[Filter Account List Views by Territory in Lightning Experience](#)

Enterprise Territory Management users can easily find accounts assigned to their territories with the My Territories and My Territory Teams filters.

[Display Change for Event Subjects in Calendar](#)

Calendar event subjects display on the second line of the event placeholders on your calendar. For events lasting only 30 minutes, event subjects aren't visible.

[Organizer and Attendee Details No Longer Exported with Events](#)

When reps export events from event detail pages, the organizer, attendee, and attendee status are no longer exported to the .ics file. And it's better this way! Now contacts and leads invited to exported meetings get fewer functionality surprises from their calendar applications.

Filter Account List Views by Territory in Lightning Experience

Enterprise Territory Management users can easily find accounts assigned to their territories with the My Territories and My Territory Teams filters.

Where: This change applies to Lightning Experience in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

[Salesforce Help: Create or Clone a List View in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Streamline Your List Views with Detailed Filters](#)

Display Change for Event Subjects in Calendar

Calendar event subjects display on the second line of the event placeholders on your calendar. For events lasting only 30 minutes, event subjects aren't visible.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Organizer and Attendee Details No Longer Exported with Events

When reps export events from event detail pages, the organizer, attendee, and attendee status are no longer exported to the .ics file. And it's better this way! Now contacts and leads invited to exported meetings get fewer functionality surprises from their calendar applications.

Where: This change applies to Salesforce Classic in Group, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: After you export from Salesforce and import to another calendar application, the data from these fields doesn't function appropriately—especially for invited contacts and leads.

How: To set up sophisticated event and invitation management, users with Microsoft® Exchange, Office 365®, or Google G Suite can integrate with Salesforce using Lightning Sync.

Service: Einstein Bots, Lightning Guided Engagement, and Field Service in Lightning Communities

Ease your team's workload by building Einstein Bots to deflect routine cases like password requests. Use Lightning Guided Engagement to guide your agents through multi-step actions, like call scripts, with an ordered list of flows right inside the console. You can even use Lightning Guided Engagement with Live Agent chats. Take advantage of robust field service features like Snap-ins Appointment Management (beta), full Lightning community support, and an optimization tool to handle schedule disruptions. Enjoy more choices in how to route work items to agents with Skills-Based Routing for Omni-Channel and External Routing for Omni-Channel. Use translation management features in Lightning Knowledge, including side-by-side comparisons, smart links for translated articles, and the Lightning Knowledge Migration Tool. Finally, manage cases more efficiently with case teams and email drafts.

IN THIS SECTION:

[Einstein Bots to the Rescue: Boost Service Team Productivity with Bots \(Generally Available\)](#)

Make your service agents' lives easier with Einstein Bots. Bots can handle routine and repetitive customer requests, freeing your agents to spend their time on more complex issues that are better suited for humans. Does your customer just need an order status? A password reset? Store hours and location? No problem—Einstein Bots can do it in their sleep!

[Case Management: Lightning Flow Guided Engagement, Case Teams, and Omni-Channel Skills-Based Routing](#)

We're introducing a robust set of features to help you and your agents manage cases better. Use Lightning Flow Guided Engagement to walk your agents through your business processes. Case teams in Lightning Experience help groups of agents work together more easily. And Omni-Channel skills-based routing lets your contact center route work to the best agent for the job.

[Field Service: Lightning Community Support, Articles for Work Types, and Path](#)

Add any field service object to Lightning communities to give your partners and customers visibility into field service processes. Improvements to work types and maintenance plans boost your team's efficiency, while enhanced filtering on service report templates helps you create polished service reports. Several field service objects now include Shield Platform Encryption, criteria-based sharing, and Path, an eye-catching progress bar that shows record status.

[Channels: Live Agent Setup Flow, APIs for Lightning Experience, and Offline Support for Snap-Ins Chat](#)

Get up and running fast with the new Live Agent and Snap-Ins Chat setup flow. And more Live Agent methods are available in the Lightning Console JavaScript API. You can also let your customers log a case when your chat agents are offline.

[Knowledge: Translation Management, Smart Links, and the Lightning Knowledge Migration Tool \(Beta\)](#)

Lost in translation? Lightning Knowledge speaks your language. Salesforce Classic translation management features, like Submit for Translation and Publish actions, are available in Lightning Knowledge. Other enhancements include side-by-side viewing of translations and master article versions in a Lightning component and updates to the language switcher component. Smart Links are now available to link to other articles in Rich Text fields. The much-anticipated Lightning Knowledge Migration Tool offers a simple solution for moving your knowledge base from Salesforce Classic into the enhanced functionality of Lightning Knowledge.

[Service Cloud Mobile: Get Case Management on the Go \(Generally Available\)](#)

All the case management features you love from Service Cloud are coming to your mobile device! Service Cloud Mobile is a lightweight alternative to the Salesforce app, built to help support agents crush customer cases while they're on the go. The app is available for both Android and iOS mobile devices.

[Other Changes in Service Cloud](#)

Learn about other changes we've made in the Service Cloud.

Einstein Bots to the Rescue: Boost Service Team Productivity with Bots (Generally Available)

Make your service agents' lives easier with Einstein Bots. Bots can handle routine and repetitive customer requests, freeing your agents to spend their time on more complex issues that are better suited for humans. Does your customer just need an order status? A password reset? Store hours and location? No problem—Einstein Bots can do it in their sleep!

Where: Einstein Bots is available in both Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Who: Einstein Bots is available to orgs with both Service Cloud and Live Agent user licenses. Each org is provided with 25 Einstein Bots conversations per month for each Live Agent User with an active subscription. To make full use of the Einstein Bots Performance page, you also need Service Cloud Analytics.

Why: Use bots to collect and qualify customer information to resolve routine issues, or seamlessly escalate them to an agent for fast resolution. For folks using Live Agent, you can set up bots to gather pre-chat info such as contact details and a case number. Bots are a great time saver for your agents.

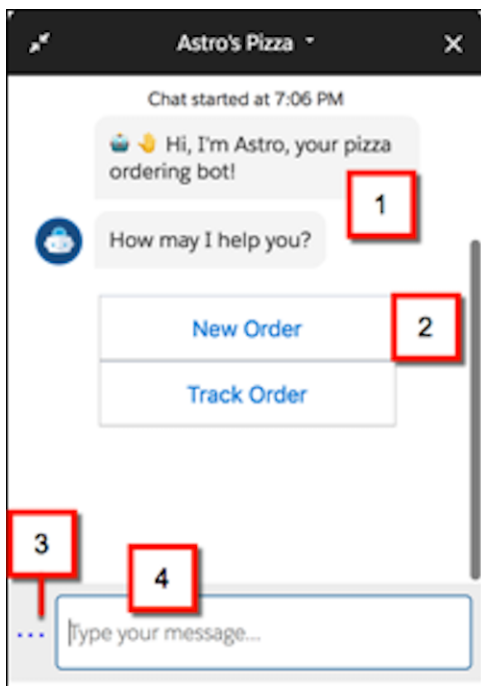
Einstein Bots are:

- Connected to your CRM data, your company's historical customer service data, and existing business processes.
- Designed to work with your pre-chat methods to gather information and save your agents time.
- Easily built and deployed using the Einstein Bot Builder. You can build bots that are purely menu- or button-driven. You can also train the bot to understand your customers' inputs in the chat window.

 **Note:** Intents support customer inputs in English only.

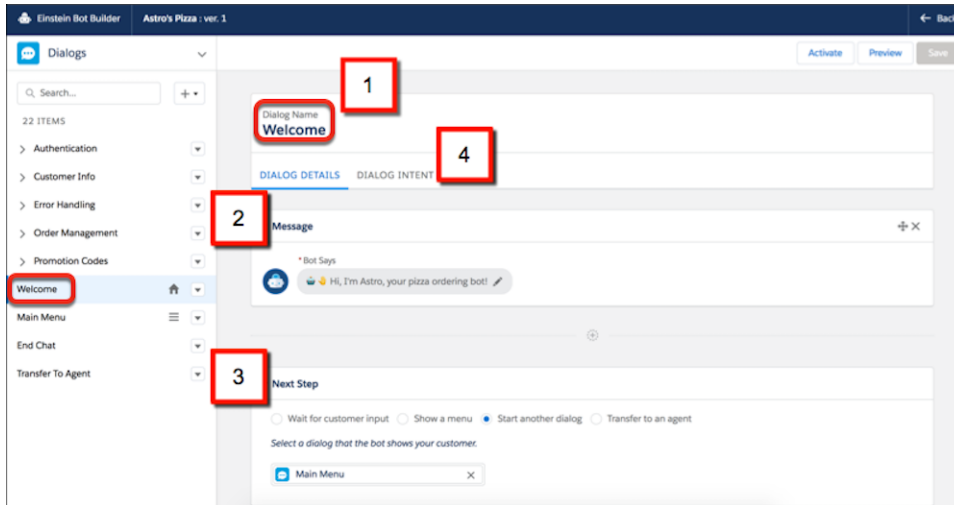
How: Here's what your customers see in the chat experience.

- First the bot identifies itself (1).
- Then it sets expectations and offers quick value with menu buttons (2).
- A Bot Options menu provides some options that are always available in the chat window, including Transfer to Agent (3).
- Optional Dialog Intents let you train the bot to understand your customers' inputs in the chat window (4).



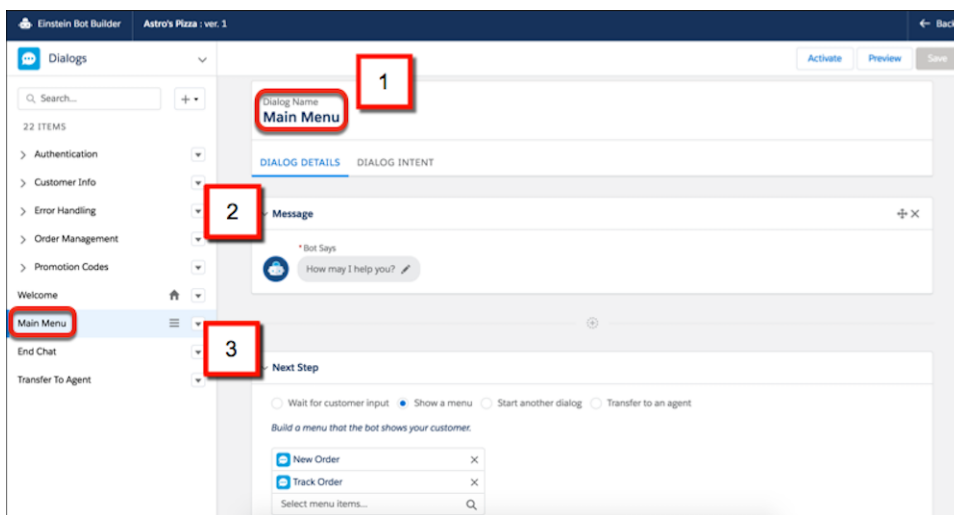
Use the Einstein Bot Builder to assemble the dialogs that define your bot. In this example:

- The Welcome dialog (1) introduces and identifies the bot (2).
- The Next Step directs the bot to display the Main Menu dialog (3).
- Optional intents associated with each dialog let you train the bot to understand your customers' inputs in the chat window (4).



In this example:

- The Main Menu dialog (1) tells the bot to send a message to the customer (2).
- The Next Step displays a menu that sets expectations and offers quick value to your customers (3).



Before you can start using bots, you need a few key elements in place.

1. Run the [Live Agent Setup Flow](#).
2. Provide a [Snap-ins chat](#) button for your customers on your community or site.
3. To preview and test your Einstein Bot, [enable Snap-ins chat](#).
4. Enable [Salesforce Knowledge](#) if your Einstein Bot serves Knowledge articles to customers.

After you set up these key elements, you're ready to build a bot!

Related Updates for Developers

Developers can use the Metadata API to set up and configure Einstein Bots. Use the following types:

- `Bot`
- `BotVersion`
- `MIDomain`

SEE ALSO:

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

[Salesforce Help: Einstein Bots for Service Cloud \(can be outdated or unavailable during release preview\)](#)

[Metadata API Developer Guide \(can be outdated or unavailable during release preview\)](#)

Case Management: Lightning Flow Guided Engagement, Case Teams, and Omni-Channel Skills-Based Routing

We're introducing a robust set of features to help you and your agents manage cases better. Use Lightning Flow Guided Engagement to walk your agents through your business processes. Case teams in Lightning Experience help groups of agents work together more easily. And Omni-Channel skills-based routing lets your contact center route work to the best agent for the job.

IN THIS SECTION:

[Service Console: Lightning Guided Engagement, Case Teams, and Email Enhancements](#)

We're making life in the Service Console easier for your agents. Lightning Guided Engagement walks your service agents through your business processes. Case teams are now available in Lightning Experience to help groups of agents work together more easily. And email enhancements make it easier to copy the right people and add attachments.

[Cases: Case Teams, Email Drafts, Apex Email Fields, and More](#)

We want to keep you and your agents happy. That's why we've made case teams and email drafts available in Lightning Experience. Agents can also perform mass quick actions on more objects. And responding to customer emails is even easier with features like drag and drop for attachments and quick access to reply actions. If you set up default email fields with Apex, get ready for some good news. Your Apex code works in Lightning Experience.

[Omni-Channel: More Options for Routing Work Items in Lightning Experience](#)

Route work items your way with Omni-Channel skills-based routing and external routing for Omni-Channel, both now generally available. Keep an eye on agent workloads and unassigned work items with Omni Supervisor, now supported for skills-based routing and external routing. See at a glance new work items and accepted work items in the Omni-Channel utility. Access Omni-Channel settings in Lightning Experience.

[Productivity Tools: Minor Improvements to Macros and Quick Text](#)

We love fine-tuning the features your users love. When creating macros, you can now let users insert text at their cursor. When working with quick text, you can assign the owner to a queue.

[Entitlement Management: Stop Agents from Marking Milestones Complete Accidentally](#)

Milestones help agents provide your customers with timely responses. To keep agents from accidentally marking milestones complete, hide the Mark Completed link on the Milestones component. By removing this link, milestones are automatically marked completed only when the conditions are met. However, agents can still go to the milestone record page to mark a milestone as completed.

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We're making life in the Service Console easier for your agents. Lightning Guided Engagement walks your service agents through your business processes. Case teams are now available in Lightning Experience to help groups of agents work together more easily. And email enhancements make it easier to copy the right people and add attachments.

IN THIS SECTION:

[Resolve Cases More Quickly with Flows and Case Teams in the Service Console](#)

Add the Guided Action List component to record pages to display a list of flows that your agents can follow to resolve cases. Add agents to case teams to collaborate on case resolutions. You can also use the new Lightning Console JavaScript APIs to customize your console.

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

Guide agents through multi-step actions, like call scripts, right inside the console. A list of ordered flows keep the process moving during agent handoffs—customers don't have to repeat themselves because agents know exactly where to pick up. For folks using Live Agent chat, a new pinned region template lets your agents view the chat and list of flows at the same time. The best news is that all this awesomeness is configured with clicks, not code.


SEE ALSO:

[Salesforce Help: Lightning Experience Console Limitations \(can be outdated or unavailable during release preview\)](#)

Resolve Cases More Quickly with Flows and Case Teams in the Service Console

Add the Guided Action List component to record pages to display a list of flows that your agents can follow to resolve cases. Add agents to case teams to collaborate on case resolutions. You can also use the new Lightning Console JavaScript APIs to customize your console.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. [Learn more.](#)

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize these Salesforce-provided Lightning console apps: Service Console and Sales Console.

How: Check out the new features available in the Service Console.

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

Guide agents through your business process flows with the Guided Action List component.

[See Activity on More Objects and Add Record Filters in Community 360](#)

In addition to article and discussion activity, support agents can now view community activity on these objects: assets, contracts, custom objects, orders, products, and tasks. Agents can see if a customer has looked at any of these items before calling support. This knowledge helps agents give more relevant information, save customer and company time, and close cases faster.

[Assess a Customer's Mood on Support Calls with Community 360 \(Pilot\)](#)

With Sentiment Analysis (Pilot) in the Community 360 component, service agents see a positive or negative icon at the top of the console to capture the customer's mood at a glance. The mood is calculated based on the customer's recent posts in the community. The sentiment information helps agents gauge levels of interest in other products or the need to tread carefully.

[Automate Tab Refresh, Change Nav Items, and Listen for Utility Item Clicks with New Lightning Console JavaScript APIs](#)

More of the Salesforce Console Integration Toolkit JavaScript APIs are available in the Lightning Console JavaScript API. Work with the navigation item in a console app, refresh a console tab, and register an event handler for a utility. Live Agent and Omni-Channel also have new methods and events.

[Copy and Share Your Workspace and Active Subtab from the Address Bar](#)

Service agents can quickly share their primary and active subtabs by copying the URL directly from their address bar.

Open Custom Lightning Components in Workspace Tabs and Subtabs

No more worrying about URLs becoming out of date. Use `openTab()` and `openSubtab()` with the new `lightning:isUrlAddressible` component to directly open custom Lightning components in your workspace.

Set Default Email Field Values with Apex in Lightning Experience

Increase the quality of your customer service and save your agents time with default values for case emails. You can even put logic behind those default values, like copying a manager when a case is escalated or applying a specific email template. If you already use the Apex `QuickAction.QuickActionDefaultsHandler` in Salesforce Classic, your code works as is, so you don't have to rewrite it in Lightning Experience.

Attach Your Files to Emails with Drag and Drop

Save yourself some clicks. To add an attachment to an email, drag the file into the body of the email. You can drag attachments in any Email action that uses an HTML email publisher, but it's not available for plain text email publishers.

Respond to Emails Faster in the Case Feed

Agents spend a lot of time handling customer emails, so we added a way to save them a few clicks. The email dropdown menu in the case feed now includes the Reply, Reply All, and Forward actions, and agents can view the actions without the expanding the email. Previously, agents had to first expand the email in the case feed.

Share Links to Individual Case Feed Posts

Let your agents know that they can share links to individual posts in the case feed in Lightning Experience. To share a link to a post, agents click the post's timestamp. The post opens in a new tab where the agent can copy and paste the URL.

SEE ALSO:

[Salesforce Help: Lightning Experience Console Limitations \(can be outdated or unavailable during release preview\)](#)

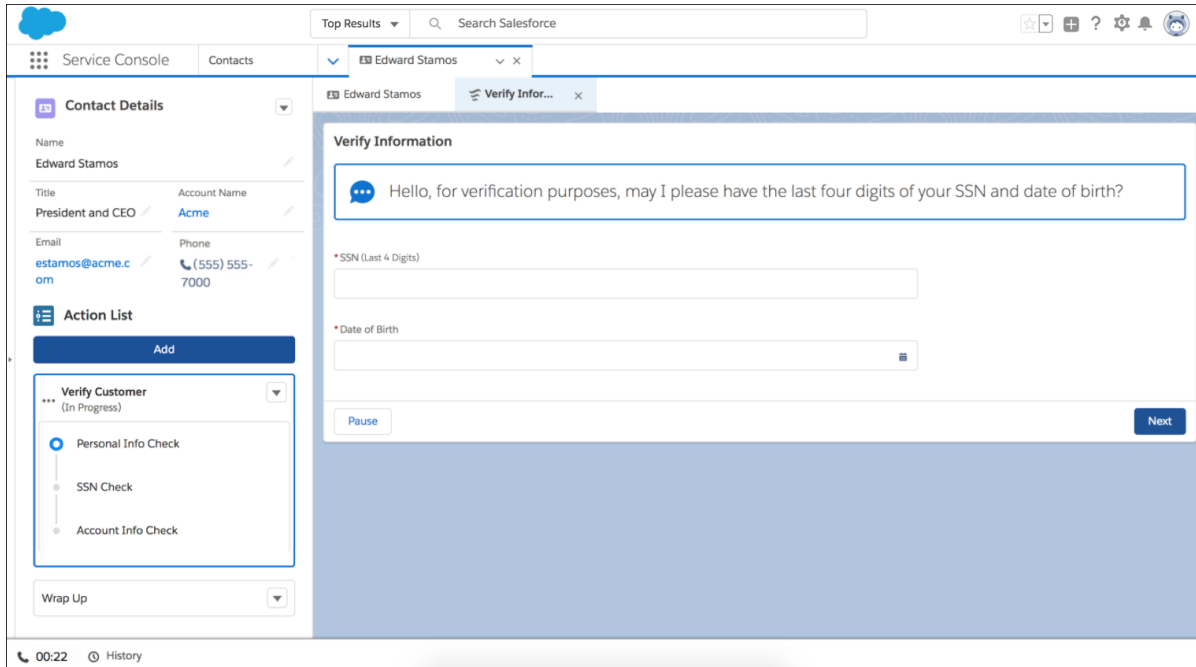
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Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

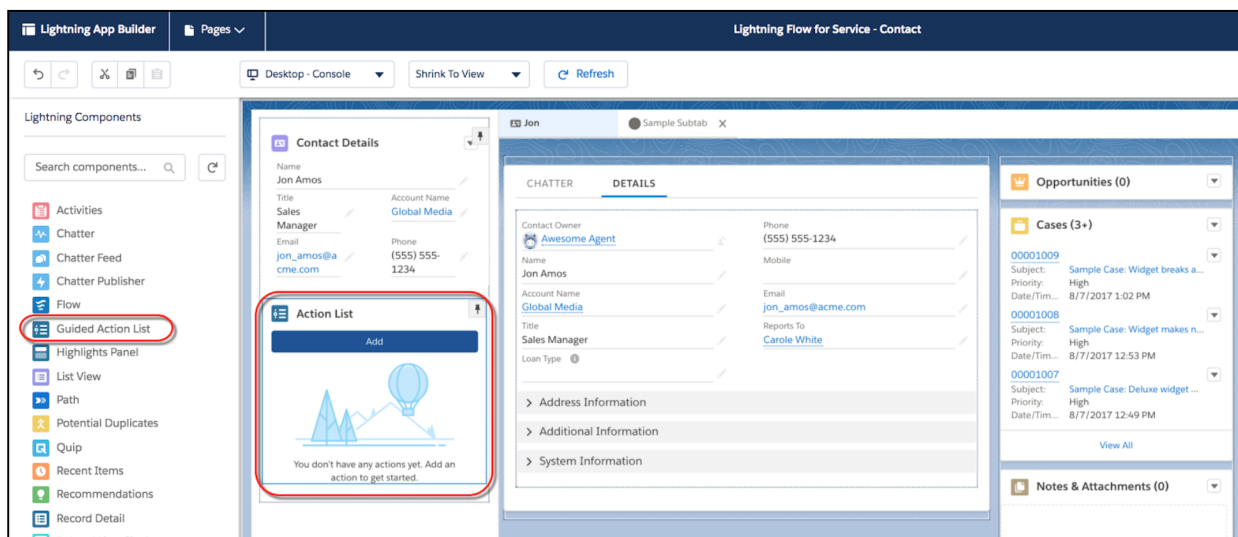
Why: The Guided Action List helps your agents provide consistent quality customer service across all your channels. Business processes, including stages for your flows, are displayed to your agents in a clear Action List. You can configure default flows for each channel, such as phone and chat, so that agents know how to handle cases on any customer touchpoint. You can also specify which flows agents should complete first and last with pinned flows. Your agents also have the flexibility to add flows based on your customer's needs.

This flow in the Service Console app helps agents verify contact information for an incoming caller.

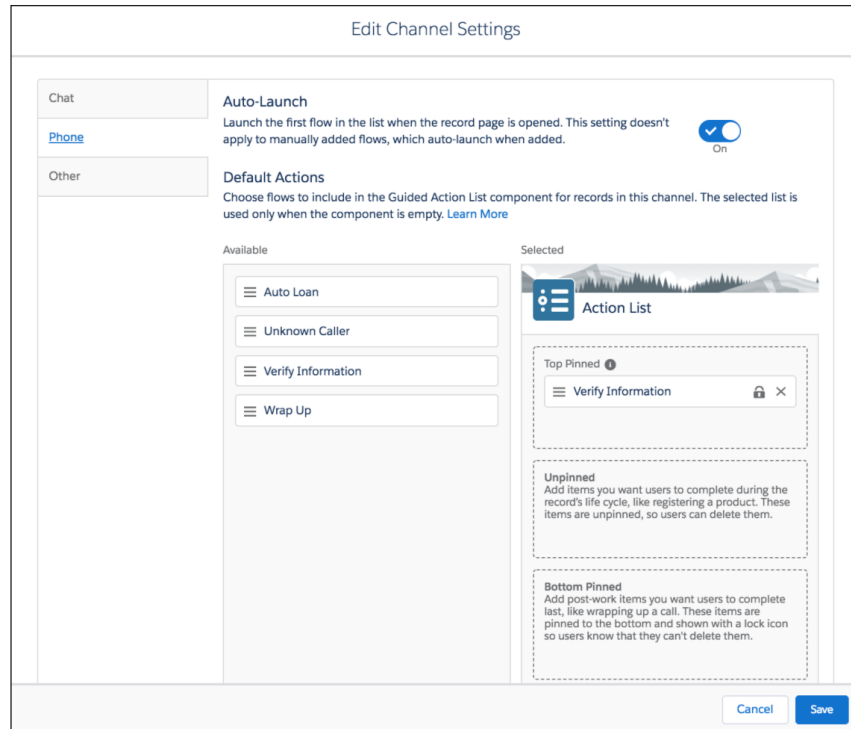
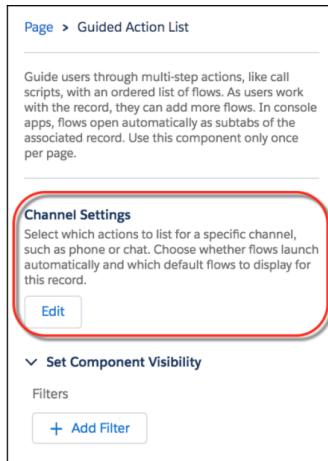


How: Lightning Guided Engagement lets you present flows as primary tabs or subtabs in a console app. While the new RecordAction junction object associates records to flows using Salesforce automation tools. When a record that has an associated flow is opened, the flow is launched as a subtab.

Use the Cloud Flow Designer to create the flow. Then use the Process Builder to add processes that associate records with the flow using the RecordAction junction object. To display the flows to agents, add the Guided Action List component to pages using the Lightning App Builder.



To configure default flows for channels, edit the channel settings from the Properties pane in Lightning App Builder.



If you have Live Agent chat, you can use the Guided Action List component and a new console record page template to set up a console experience that's sure to make your agents successful. See [Resolve Cases with Chat and Lightning Guided Engagement](#).

You can also display a list of recommended flows to agents when certain conditions are met by adding the Einstein Recommendations component to your Lightning pages. See [Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#).

Lightning Guided Engagement is built on the Lightning platform, which means partners can create AppExchange packages with customized solutions for your business needs.

SEE ALSO:

[Lightning Guided Engagement Developer Guide \(English only\)](#)

Cases: Case Teams, Email Drafts, Apex Email Fields, and More

We want to keep you and your agents happy. That's why we've made case teams and email drafts available in Lightning Experience. Agents can also perform mass quick actions on more objects. And responding to customer emails is even easier with features like drag and drop for attachments and quick access to reply actions. If you set up default email fields with Apex, get ready for some good news. Your Apex code works in Lightning Experience.

IN THIS SECTION:

[Create Case Teams in Lightning Experience](#)

You asked for it, and now all your case team members can work together in Lightning Experience, as well as Salesforce Classic. A case team is a group of people that work together to solve cases. For example, a case team can include support agents, support managers, and product managers. Based on assigned roles, all team members can be in sync while working on a case.

[Save the Day with Private Email Drafts for Cases](#)

Agents can rest assured that their email is safe when they step away. Email drafts are automatically saved every few seconds, keeping important information from being lost. Previously, you could only use drafts in Salesforce Classic and when saved, drafts were visible to anyone with access to the case. In Lightning Experience, drafts are private by default to the agent associated with the case.

[Set Default Email Field Values with Apex in Lightning Experience](#)

Increase the quality of your customer service and save your agents time with default values for case emails. You can even put logic behind those default values, like copying a manager when a case is escalated or applying a specific email template. If you already use the Apex `QuickAction.QuickActionDefaultsHandler` in Salesforce Classic, your code works as is, so you don't have to rewrite it in Lightning Experience.

[Use Your Case Feed Publisher APIs in Lightning Experience](#)

If you use the Salesforce Classic Publisher JavaScript APIs, also known as the Case Feed Publisher APIs, your Visualforce components and pages now work in Lightning Experience. No need to rewrite your code! You can also create custom components in Lightning Experience to interact with quick actions on a record page.

[Perform Mass Quick Actions on More Objects](#)

Edit or create up to 100 records in a list view, except for recently viewed lists, with a mass quick action. You can use a mass quick action with cases, leads, accounts, campaigns, contacts, opportunities, work orders, and custom objects in Lightning Experience. Previously, create and update mass quick actions only worked on cases, leads, and custom objects in Lightning Experience.

[Enter Internal Comments When Closing a Case](#)

Add internal comments right where you need them. Agents can insert a case comment when they close a case. No more switching to the Case Comments related list before closing a case! Previously, you had to switch to the Case Comments related list, add a comment or update one, then close the case.

[Send Email Notifications for Case Changes](#)

A case can have lots of changes during its life cycle. To help your agents stay on top of things, email notifications now work in Lightning Experience. Agents receive an email when the case owner changes and when case comments are added. Even contacts can receive email notifications when the case is created, updated, or comments are added. Previously, case email notifications worked only in Salesforce Classic.

[Respond to Emails Faster in the Case Feed](#)

Agents spend a lot of time handling customer emails, so we added a way to save them a few clicks. The email dropdown menu in the case feed now includes the Reply, Reply All, and Forward actions, and agents can view the actions without the expanding the email. Previously, agents had to first expand the email in the case feed.

[Attach Your Files to Emails with Drag and Drop](#)

Save yourself some clicks. To add an attachment to an email, drag the file into the body of the email. You can drag attachments in any Email action that uses an HTML email publisher, but it's not available for plain text email publishers.

[Share Links to Individual Case Feed Posts](#)

Let your agents know that they can share links to individual posts in the case feed in Lightning Experience. To share a link to a post, agents click the post's timestamp. The post opens in a new tab where the agent can copy and paste the URL.

[Find Case Comments with Global Search](#)

Search for comments associated with your case from the Service Console in Lightning Experience. Previously, you couldn't search for case comments.

Create Case Teams in Lightning Experience

You asked for it, and now all your case team members can work together in Lightning Experience, as well as Salesforce Classic. A case team is a group of people that work together to solve cases. For example, a case team can include support agents, support managers, and product managers. Based on assigned roles, all team members can be in sync while working on a case.

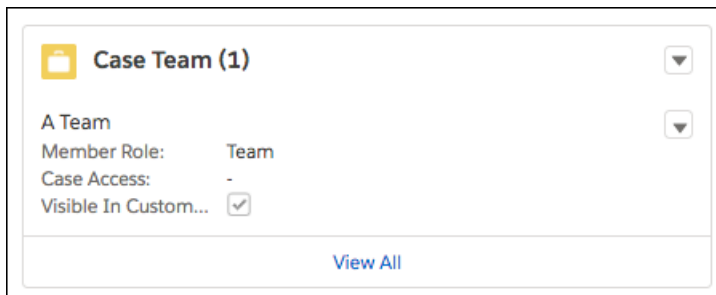
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: To let people create and work on case teams.

How: Add the Case Team related list to case page layouts.

Here's what you can do with case teams.

- Predefine case teams so that users can quickly add people with whom they work.
- Create assignment rules that add predefined teams to cases that match specific criteria, such as when cases originate from emails.
- Create email alerts that notify team members when an action happens on a case, such as when a comment is added.



After you set up case teams, users can:

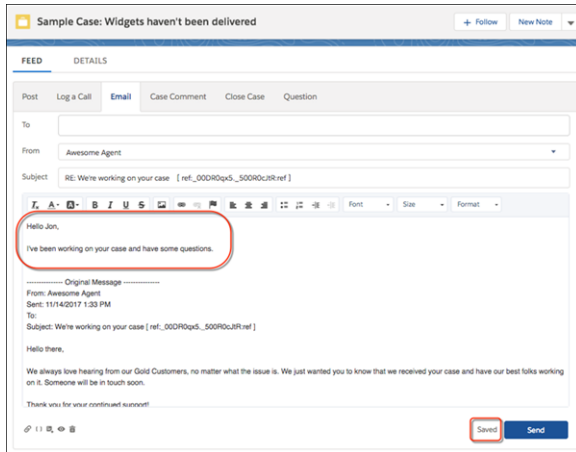
- Add people to the Case Team related list on cases.
- Choose one of the predefined roles that the person plays on the case. Roles determine the level of access to a case, such as read-only or read and write access.
- Add contacts to case teams, but they can only access cases when they're enabled as customer portal users assigned to case page layouts. Customer portal users can't update case teams or view case team roles.
- Filter case lists when they're a team member by choosing My Case Teams.
- Run a case report by choosing My team's cases from the View filter.

Save the Day with Private Email Drafts for Cases

Agents can rest assured that their email is safe when they step away. Email drafts are automatically saved every few seconds, keeping important information from being lost. Previously, you could only use drafts in Salesforce Classic and when saved, drafts were visible to anyone with access to the case. In Lightning Experience, drafts are private by default to the agent associated with the case.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To use email drafts, Email-to-Case must be enabled in your org. Then enable email drafts from the Support Settings page in Setup. Deleting a draft resets the email fields (for example To:, From:, Subject:) to their original state.



Keep the following things in mind when working with email drafts.

- Both standard and custom email messages are saved, however, changes to standard fields triggers auto-save. Changes to the custom fields do not trigger auto-save.
- Drafts only work in Case Feed. They are not currently supported in Docked Email Composer.
- If a macro updates email fields but doesn't send the email, the email draft isn't saved. It isn't saved until an agent makes more edits to the email fields.

SEE ALSO:

[Summer '18 Release Notes: You Asked for It!](#)

Set Default Email Field Values with Apex in Lightning Experience

Increase the quality of your customer service and save your agents time with default values for case emails. You can even put logic behind those default values, like copying a manager when a case is escalated or applying a specific email template. If you already use the Apex `QuickAction.QuickActionDefaultsHandler` in Salesforce Classic, your code works as is, so you don't have to rewrite it in Lightning Experience.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, you could only use the `QuickAction.QuickActionDefaultsHandler` Apex interface in Salesforce Classic.

How: Create an Apex class that uses the `QuickAction.QuickActionDefaultsHandler` interface. Specify your default email field values and logic in the class. Then in Setup, go to the Support Settings page. Select **Enable Default Email Templates or the Default Handler for Email Action**, and point to your new class.

This Apex class appends `managers@acme.com` to the BCC field when the case severity is high.

```
global class EmailPublisherForHighPriorityCases implements
QuickAction.QuickActionDefaultsHandler {
    // Empty constructor
    global EmailPublisherForHighPriorityCases () {
    }

    // The main interface method
    global void onInitDefaults(QuickAction.QuickActionDefaults[] defaults) {
        QuickAction.SendEmailQuickActionDefaults sendEmailDefaults =
(QuickAction.SendEmailQuickActionDefaults)defaults.get(0);
        EmailMessage emailMessage = (EmailMessage)sendEmailDefaults.getTargetSObject();
```

```

        Case c = [SELECT CaseNumber, Priority FROM Case WHERE
Id::sendEmailDefaults.getContextId()];

        // If case severity is "High," append "managers@acme.com" to the existing (and
possibly blank) BCC field
        if (c.Priority != null && c.Priority.equals('High')) { // Priority is 'High'
            emailMessage.BccAddress = 'managers@acme.com';
        }
    }
}

```

Here are a few things to keep in mind about how the `QuickAction.QuickActionDefaultsHandler` interface works in Lightning Experience.

- The Apex interface overrides predefined field values for the Email quick action.
- The Apex interface works with the out-of-the-box Email action provided on cases. You can also use the Apex interface with custom Email actions for the case object.
- The Apex interface in Lightning Experience doesn't support:
 - Email attachments
 - Custom email fields
 - Visualforce email templates, which are a type of email template available in Salesforce Classic
- If your Apex interface adds content from a Lightning email template that includes merge fields into the email body, those merge fields display unresolved. During preview and send, the merge fields resolve.
- You can't use the Apex interface to insert content into the body of an email with existing content. However, you can use the interface to overwrite the existing content.

Use Your Case Feed Publisher APIs in Lightning Experience

If you use the Salesforce Classic Publisher JavaScript APIs, also known as the Case Feed Publisher APIs, your Visualforce components and pages now work in Lightning Experience. No need to rewrite your code! You can also create custom components in Lightning Experience to interact with quick actions on a record page.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:


[Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs](#)

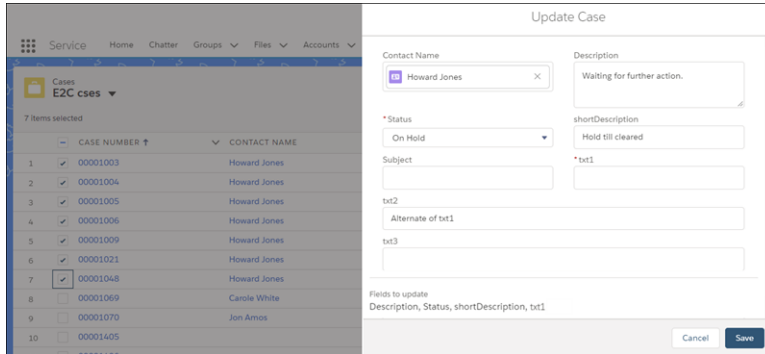
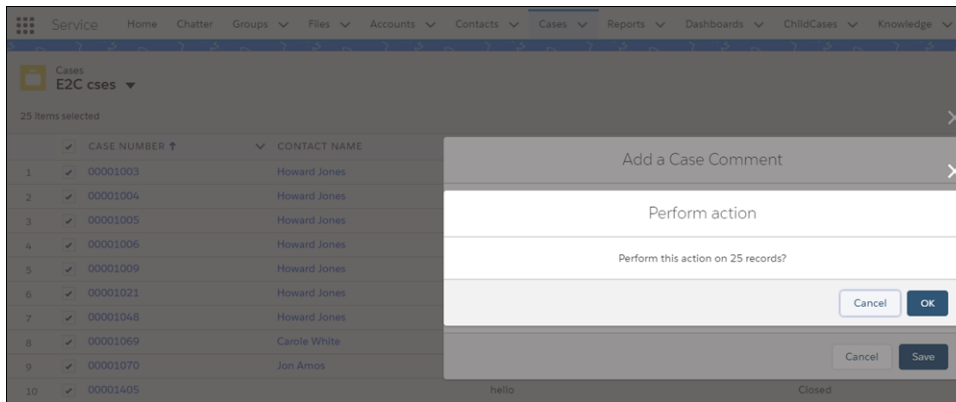
Perform Mass Quick Actions on More Objects

Edit or create up to 100 records in a list view, except for recently viewed lists, with a mass quick action. You can use a mass quick action with cases, leads, accounts, campaigns, contacts, opportunities, work orders, and custom objects in Lightning Experience. Previously, create and update mass quick actions only worked on cases, leads, and custom objects in Lightning Experience.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To set up mass quick actions, customize an object's search layout. We recommend using predefined values to guide the user's input. Predefined values can help ensure consistency, making it faster and easier for users to perform mass quick actions on records. They help prevent errors because, just like performing a single action, there is no mass undo for a mass quick action.

 **Note:** Bulk actions can't be performed on notes.

Enter Internal Comments When Closing a Case

Add internal comments right where you need them. Agents can insert a case comment when they close a case. No more switching to the Case Comments related list before closing a case! Previously, you had to switch to the Case Comments related list, add a comment or update one, then close the case.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Edit your Close Case action or create one. Add the Internal Comments field to the action's layout. If you created an action, make sure that you add the action to the case page layout in your console app.

Send Email Notifications for Case Changes

A case can have lots of changes during its life cycle. To help your agents stay on top of things, email notifications now work in Lightning Experience. Agents receive an email when the case owner changes and when case comments are added. Even contacts can receive email notifications when the case is created, updated, or comments are added. Previously, case email notifications worked only in Salesforce Classic.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To set up email notifications for cases, go to the Support Settings page in Setup. Look for the following settings.

Notify Case Owners When Case Ownership Changes

The new case owner receives an email when assigned using the Change Owner action. When an agent changes the case owner, **Send notification email** is selected by default. An agent can override this setting by deselecting the checkbox.

Tip: Agents can use the Send notification email setting even if you don't enable Notify Case Owners When Case Ownership Changes. However, when you enable this setting, the checkbox is always selected for user and queue changes.

Notify Case Owner of New Case Comments

Case owners receive an email every time a case comment is added by a user who is not the case owner. This includes internal and external comments.

External Comments

New Case Comment

Information

* Body

Internal Comments

Edit 00001000

Case Owner
Expert Agent

Case Number
00001000

Account Name
Global Media

Contact Name
Jon Amos

Contact Phone
(555) 555-1234


Contact Email
jon_amos@acme.com

Additional Information

* Status
Escalated

Priority
Low

Internal Comments

 **Note:** If the Internal Comments field is updated with an inline edit, an email notification isn't sent to the case owner.

Enable Case Comment Notification to Contacts

Case contacts receive an email when a case comment is modified or added to a case. To send these notifications, specify a Case Comment Template.

New Case Comment

Information

* Body

Send Customer Notification

Case Creation Template

Case contacts receive an email when a case is created or updated. In Lightning Experience, to display the Send notification email to contact checkbox, you must specify a Case Creation Template.

SEE ALSO:

[Salesforce Help: Customize Support Settings \(can be outdated or unavailable during release preview\)](#)

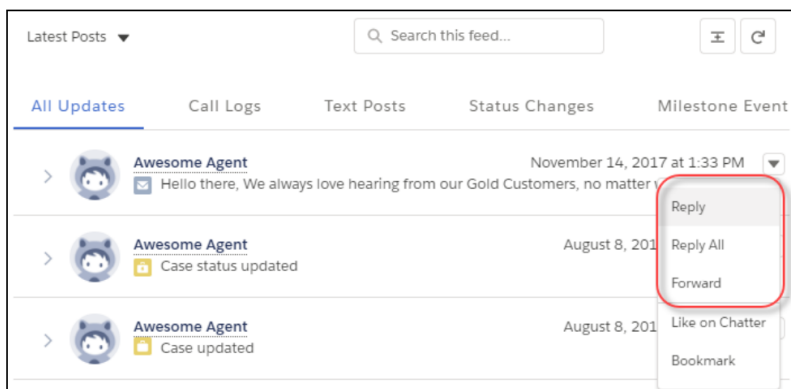
Respond to Emails Faster in the Case Feed

Agents spend a lot of time handling customer emails, so we added a way to save them a few clicks. The email dropdown menu in the case feed now includes the Reply, Reply All, and Forward actions, and agents can view the actions without the expanding the email. Previously, agents had to first expand the email in the case feed.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Agents need the Send Email permission to view the new dropdown actions. If your agents already respond to emails, they probably already have this permission.

How: The actions display in the dropdown only in the case feed. You don't see these email actions on a contact record page. The dropdown lists Reply, Reply All, and Forward for plain text and HTML email actions. If your case record page already includes an Email action, there's nothing you need to do.

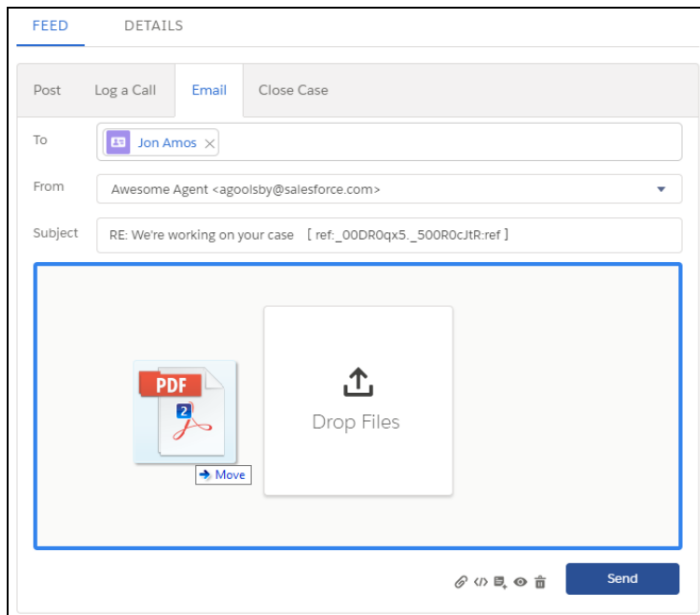


Attach Your Files to Emails with Drag and Drop

Save yourself some clicks. To add an attachment to an email, drag the file into the body of the email. You can drag attachments in any Email action that uses an HTML email publisher, but it's not available for plain text email publishers.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: For new orgs, the case record page includes this email action by default. Make sure that you have the HTML action in your layout, not the plain text action. You can't drag files more than 2 GB.



SEE ALSO:

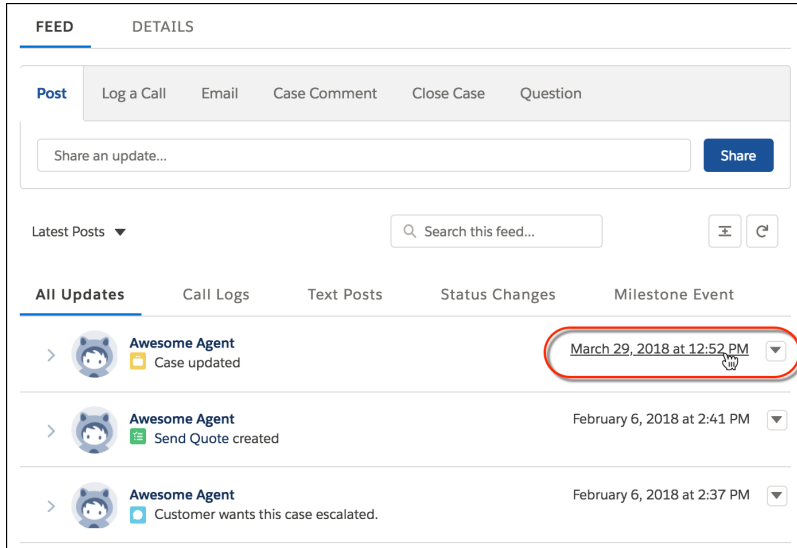
[Salesforce Help: Create a Send Email Quick Action for Cases \(can be outdated or unavailable during release preview\)](#)

Share Links to Individual Case Feed Posts

Let your agents know that they can share links to individual posts in the case feed in Lightning Experience. To share a link to a post, agents click the post's timestamp. The post opens in a new tab where the agent can copy and paste the URL.

Where: This change applies to Lightning Experience in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: Now your agents can collaborate in Lightning Experience just like they did in Salesforce Classic.

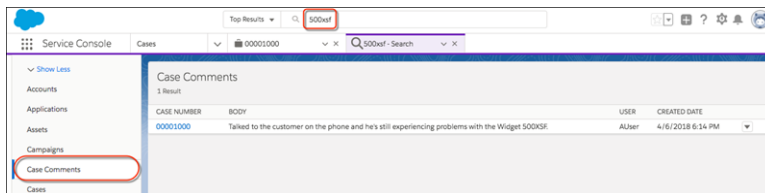


Find Case Comments with Global Search

Search for comments associated with your case from the Service Console in Lightning Experience. Previously, you couldn't search for case comments.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In your Service Console app or any Lightning app, enter details about your comment in the global search bar. On the search results page, look for the Case Comments heading in the left navigation. If you don't see this right away, click **Show More**.



Omni-Channel: More Options for Routing Work Items in Lightning Experience

Route work items your way with Omni-Channel skills-based routing and external routing for Omni-Channel, both now generally available. Keep an eye on agent workloads and unassigned work items with Omni Supervisor, now supported for skills-based routing and external routing. See at a glance new work items and accepted work items in the Omni-Channel utility. Access Omni-Channel settings in Lightning Experience.

IN THIS SECTION:

[Get the Right Work to the Right Agent with Skills-Based Routing \(Generally Available\)](#)

Your agents have different skill sets and abilities. Your customers have different needs. With skills-based routing for Omni-Channel, your contact center can route work to the best agent for the job. Improve the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

[Transfer Work Items to a Different Skill Set](#)

It's frustrating for agents when they don't have the right skill set to solve a customer case—and it's frustrating for customers who have to wait longer to get their issue resolved. With skills-based routing, agents can quickly transfer the work item to an agent who has those skills. If an agent with the right combination of skills isn't available, the work item is listed as pending until an agent with matching skills is available.

[View Work Routed by Skills in Omni-Channel Supervisor](#)

Contact center supervisors can keep an eye on agent workloads and backlogs for skills-based routing in Omni-Channel Supervisor. Supervisors can see at a glance the agent name, status, skills, work items, workload, and capacity.

[Route Third-Party Work Items with External Routing \(Generally Available\)](#)

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs, so that your agents can receive work items from any source, all in one console. Your agents can handle externally routed work in both Salesforce Classic and Lightning Experience. Contact center supervisors can view externally routed work in Omni Supervisor.

[See "New" Work and "My Work" in the Omni-Channel Utility](#)

The Omni-Channel utility now has tabs to help your support agents manage their work. They can view incoming work items in the New tab and work items that they've accepted in the My Work tab in the Omni-Channel utility.

[Set Up Omni-Channel in Lightning Experience](#)

No more switching back to Salesforce Classic just to set up and customize Omni-Channel! You can stay in the modern Lightning Experience that you've come to know and love. All Omni-Channel setup pages, such as Omni-Channel Settings, are now available in Lightning Experience.

Get the Right Work to the Right Agent with Skills-Based Routing (Generally Available)


Your agents have different skill sets and abilities. Your customers have different needs. With skills-based routing for Omni-Channel, your contact center can route work to the best agent for the job. Improve the quality of customer service by automatically routing work items to the agent who has the skills necessary to do the work.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Skills-based routing looks at the skills required to complete a work item and matches them to the skills assigned to the agent. You can define whatever skills that you need for your company. Skills typically are attributes such as language ability, product knowledge, certifications, case origin, and account history.

Skills-based routing is supported for the following objects: cases, leads, orders, and custom objects. You can't route chats or SOS with skills-based routing.

Managers can use Omni Supervisor with skills-based routing to see what agents are working on, what work items are unassigned, and how long work items have been waiting.

 **Important:** You can either use queue-based routing or skills-based routing to route work items to agents. If you enable skills-based routing, you can't use queue-based routing, and vice versa.

How: To get started with skills-based routing, enable skills-based routing in your org and follow the setup instructions to define skills, assign skills to agents, write a custom Apex class, and define a workflow to trigger skills-based routing. Don't worry, we've got [step-by-step instructions](#).

SEE ALSO:

[Salesforce Help: Skills-Based Routing for Omni-Channel \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Skills-Based Routing \(can be outdated or unavailable during release preview\)](#)

Transfer Work Items to a Different Skill Set

It's frustrating for agents when they don't have the right skill set to solve a customer case—and it's frustrating for customers who have to wait longer to get their issue resolved. With skills-based routing, agents can quickly transfer the work item to an agent who has those skills. If an agent with the right combination of skills isn't available, the work item is listed as pending until an agent with matching skills is available.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: This feature is automatically enabled for agents who have Omni-Channel skills-based routing set up in their orgs and who use Lightning Experience.

SEE ALSO:

[Salesforce Help: Transfer a Work Item to a Different Skill Set \(can be outdated or unavailable during release preview\)](#)

View Work Routed by Skills in Omni-Channel Supervisor

Contact center supervisors can keep an eye on agent workloads and backlogs for skills-based routing in Omni-Channel Supervisor. Supervisors can see at a glance the agent name, status, skills, work items, workload, and capacity.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: If Omni-Channel skills-based routing is enabled in your org, Omni Supervisor automatically shows the tabs for monitoring agent workloads and the work item backlog for skills.

SEE ALSO:

[Salesforce Help: Omni-Channel Supervisor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Get to Know the Omni-Channel Supervisor Tabs \(can be outdated or unavailable during release preview\)](#)

Route Third-Party Work Items with External Routing (Generally Available)

Integrate third-party routing with a partner application with Omni-Channel using Salesforce standard APIs and streaming APIs, so that your agents can receive work items from any source, all in one console. Your agents can handle externally routed work in both Salesforce Classic and Lightning Experience. Contact center supervisors can view externally routed work in Omni Supervisor.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

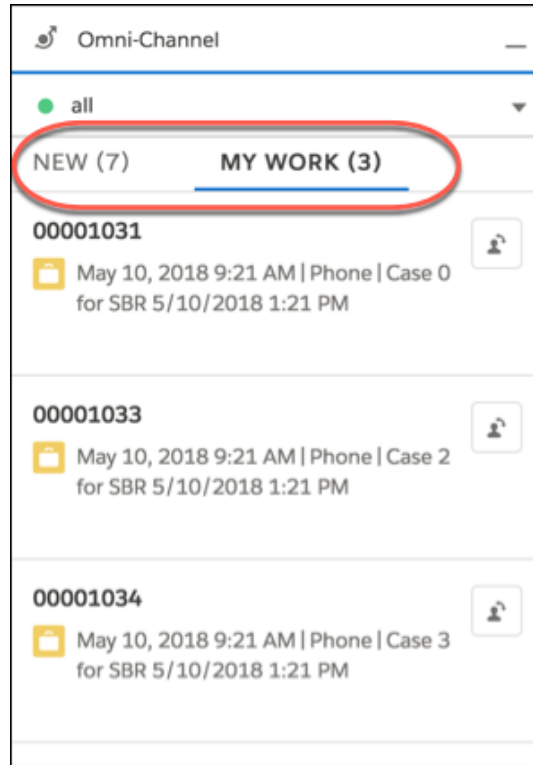
[Salesforce Help: External Routing for Omni-Channel \(can be outdated or unavailable during release preview\)](#)

See "New" Work and "My Work" in the Omni-Channel Utility

The Omni-Channel utility now has tabs to help your support agents manage their work. They can view incoming work items in the New tab and work items that they've accepted in the My Work tab in the Omni-Channel utility.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why:



How: This feature is automatically enabled for agents using Lightning Experience.

SEE ALSO:

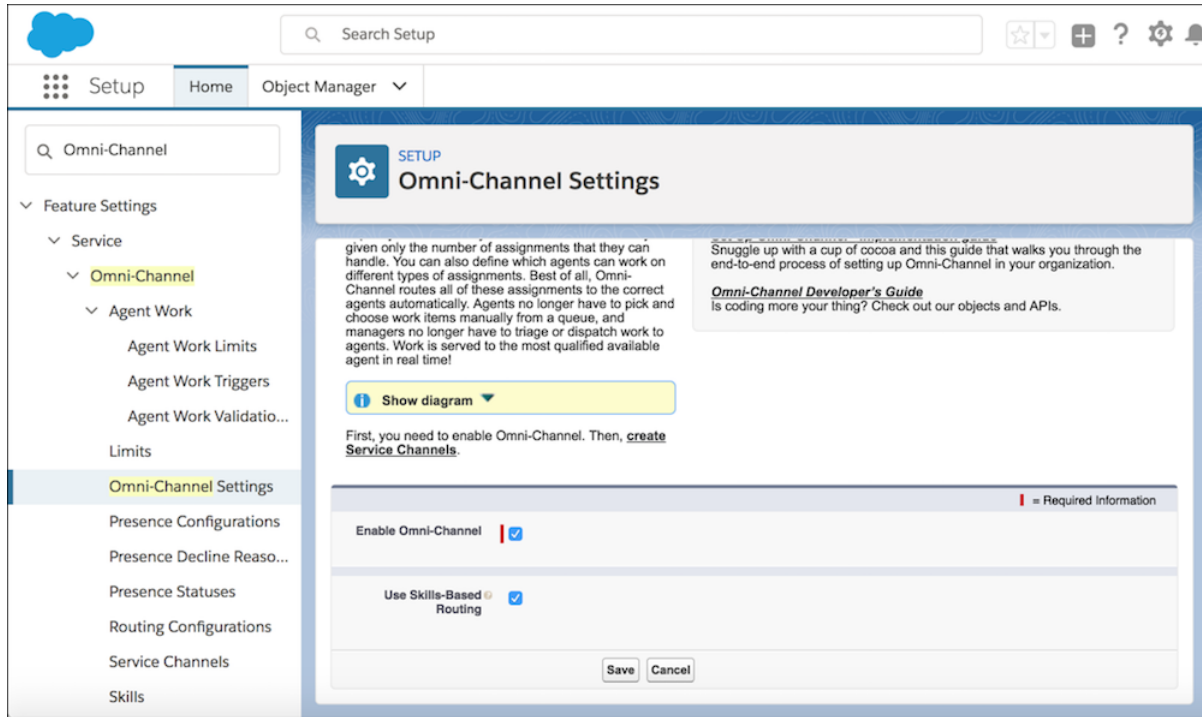
[Salesforce Help: Omni-Channel Utility for Lightning Console Apps \(can be outdated or unavailable during release preview\)](#)

Set Up Omni-Channel in Lightning Experience

No more switching back to Salesforce Classic just to set up and customize Omni-Channel! You can stay in the modern Lightning Experience that you've come to know and love. All Omni-Channel setup pages, such as Omni-Channel Settings, are now available in Lightning Experience.

Where: This change applies to Lightning Experience in Professional, Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: This change is available in all orgs. In Lightning Experience, go to Setup and enter *Omni-Channel* in the Quick Find box. You'll see all the Omni-Channel setup pages.



Productivity Tools: Minor Improvements to Macros and Quick Text

We love fine-tuning the features your users love. When creating macros, you can now let users insert text at their cursor. When working with quick text, you can assign the owner to a queue.

IN THIS SECTION:

[Create Macros That Insert Text at Your Cursor](#)

Previously when creating a macro, you could only replace existing text or add information before or after the text. Now you can insert text at your cursor.

[Change the Quick Text Owner to a Queue](#)

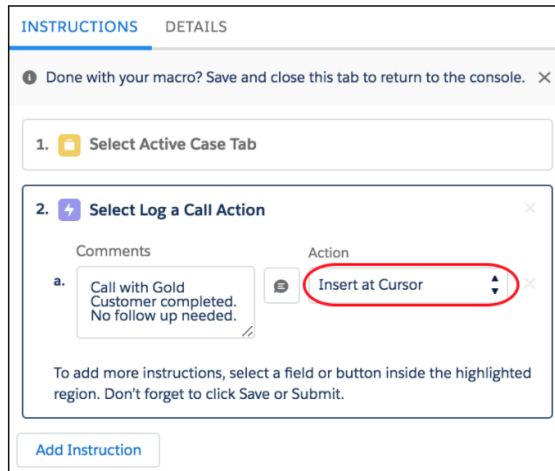
To foster collaboration and share the maintenance of quick text, assign a queue as the owner. With quick text, users in queues can insert predefined messages, like greetings, answers to common questions, and short notes. Previously, you could assign only an individual as the owner.

Create Macros That Insert Text at Your Cursor

Previously when creating a macro, you could only replace existing text or add information before or after the text. Now you can insert text at your cursor.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When you create a macro, select **Insert at Cursor** from the Action dropdown.



Before using macros created with Insert at Cursor actions, remember to initialize the cursor where you want the text added. If not, the macro inserts at the beginning of the field.

- Note:** If you created macros in Lightning Experience in or before Spring '18 that use Insert After Existing Text instructions, you might need to update your macros. Some macros created with Insert After Existing Text weren't performing as intended. Review and update your macros instructions carefully.

SEE ALSO:

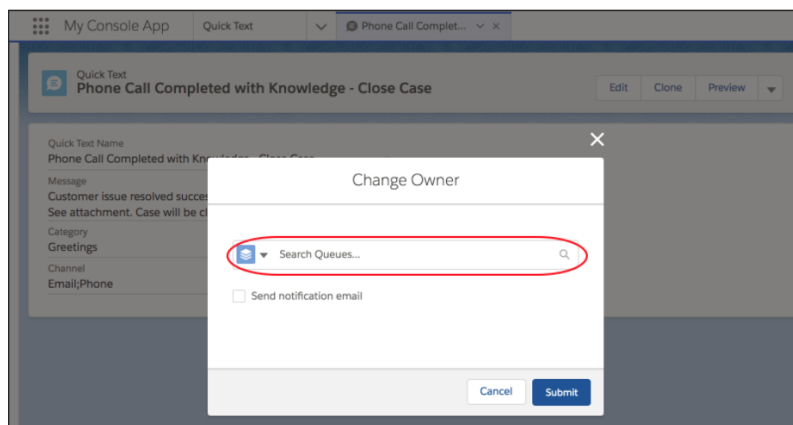
[Salesforce Help: Macros in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Change the Quick Text Owner to a Queue

To foster collaboration and share the maintenance of quick text, assign a queue as the owner. With quick text, users in queues can insert predefined messages, like greetings, answers to common questions, and short notes. Previously, you could assign only an individual as the owner.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To change the owner of quick text, select **Queues** from the dropdown.



SEE ALSO:

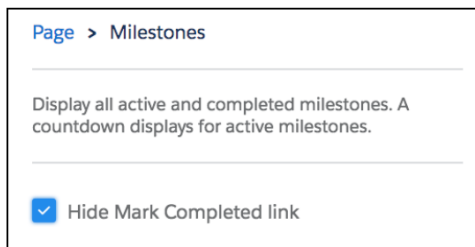
[Salesforce Help: Set Up and Use Quick Text \(can be outdated or unavailable during release preview\)](#)

Entitlement Management: Stop Agents from Marking Milestones Complete Accidentally

Milestones help agents provide your customers with timely responses. To keep agents from accidentally marking milestones complete, hide the Mark Completed link on the Milestones component. By removing this link, milestones are automatically marked completed only when the conditions are met. However, agents can still go to the milestone record page to mark a milestone as completed.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: To hide the link, in the Lightning App Builder, edit the Milestones component properties. Select **Hide Mark Completed link**, which is deselected by default.



SEE ALSO:

[Salesforce Help: Set Up the Milestone Tracker \(can be outdated or unavailable during release preview\)](#)

Field Service: Lightning Community Support, Articles for Work Types, and Path

Add any field service object to Lightning communities to give your partners and customers visibility into field service processes. Improvements to work types and maintenance plans boost your team's efficiency, while enhanced filtering on service report templates helps you create polished service reports. Several field service objects now include Shield Platform Encryption, criteria-based sharing, and Path, an eye-catching progress bar that shows record status.

IN THIS SECTION:

[Add Knowledge Articles to Work Types](#)

Send technicians into the field armed with the information that they need to be successful. When you attach a knowledge article to a work type, the article shows up on work orders and work order line items that use the work type. You can also now attach and detach articles on work orders and work order line items from the Knowledge component in Lightning Experience. Previously, articles on these records were view-only in Lightning Experience.

[Guide Your Team with Path for Field Service](#)

Quickly track a record's stage in its life cycle with the help of Path, an eye-catching progress bar on record detail pages. Path is now available to track the status of work orders, work order line items, and service appointments.

[Automate Work Order Generation for Maintenance Plans](#)

Sit back, put your feet up, and watch the work orders roll in! A new feature on maintenance plans kicks off the generation of a new batch of work orders whenever the current batch nears completion. You can choose how far in advance a new batch is generated and opt to pause generation if the current batch's last work order is still open.

[View Related Maintenance Plans on Accounts, Contacts, and Locations](#)

Make things easier for your support team by adding the Maintenance Plans related list to account, contact, and location page layouts. This related list lets agents quickly see an account's or contact's active maintenance plans, and determine whether a location (like a customer site) is associated with a maintenance plan.

[Encrypt Data at Rest with Shield for Work Orders and Service Appointments](#)

Shield Platform Encryption and Field Audit Trail are now available for certain fields on work orders, work order line items, and service appointments. You can store field values for up to 10 years and encrypt supported fields to provide an extra layer of protection to your customers' data.

[Create Criteria-Based Sharing Rules for Field Service](#)

Control who can view and update records. Criteria-based sharing is newly available for seven field service objects. You can define up to 50 criteria-based sharing rules per object.

[Filter Related Lists on Service Reports \(Generally Available\)](#)

Bloated service reports got you down? Reduce the number of records that appear in related lists on service reports by adding filters to any service report template. This way, customers see only the records that they need.

[Manage Field Service in Lightning Communities](#)

Sharing field service data with partners, contractors, and customers just got easier. All Field Service Lightning standard objects are now available in Lightning communities. Field service objects were already available in communities built using Salesforce Tabs + Visualforce, but previously only work orders, work order line items, and service appointments were available in Lightning communities.

[Create Larger Service Territory Hierarchies](#)

A hierarchy of service territories can now contain up to 10,000 service territories. Previously, the limit was 500. Depending on how you use territories, your number of hierarchies could get big, so we relaxed the limit to spare you any headache.

[Edit the Currency Code on Time Sheets](#)

Life sometimes pays you in unexpected ways. Let your mobile workforce change the currency listed on their time sheets to reflect the currency used in their service appointments. The Currency ISO code on time sheets and time sheet entries is now editable in the user interface.

[Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments \(Beta\)](#)

Snap-ins Appointment Management (beta) gives your customers an easy way to schedule, modify, and cancel appointments with your mobile workforce. The experience is powered by Visual Workflow, which means you can craft the perfect interaction and decide when and how to create related records like work orders.

[Field Service Managed Package: Resource Schedule Optimization, Gantt Live Updates, and Custom List Filters](#)

Optimize a resource's day to better handle last-minute changes. Watch your changes update immediately on the Gantt. Let dispatchers make their own list views with custom filters.

[Field Service for Mobile: Android 4.0](#)

Version 4.0 brings some of your favorite features that were previously only available in the iOS version to the Android version of Field Service Lightning. Here's a quick list, just to name a few. Use quick actions to give your users flows, created in the Cloud Flow Designer. Consume products from multiple inventory locations. Use dependent picklists to set your users up for success. Provide useful images in Knowledge articles. Provide multiple custom listviews for users to control the schedule screen. Control the display of resource absences on the profile tab with layouts. And so much more.

Add Knowledge Articles to Work Types

Send technicians into the field armed with the information that they need to be successful. When you attach a knowledge article to a work type, the article shows up on work orders and work order line items that use the work type. You can also now attach and detach articles on work orders and work order line items from the Knowledge component in Lightning Experience. Previously, articles on these records were view-only in Lightning Experience.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Knowledge must be set up in your org.

Who: Agents with Read access on work types can attach and detach articles. To view an article on a work type, you need Read access on work types and on the article type.

Why: Since work types help your team complete specific field service tasks the same way every time, throwing knowledge articles into the mix makes it even easier to standardize your processes. For example, if you have a work type named Solar Panel Replacement, you can attach an article that explains how to replace a solar panel. Any work order using that work type automatically includes the article, and the person assigned to the work order has the instructions at hand. This also makes it easier for experienced technicians to share their knowledge by suggesting updates to articles.

How: To start using the new features:

- Add the Articles related list to your work type page layouts
- In Lightning Experience, add the Knowledge component to your work type, work order, and work order line item page layouts

Attach articles to work types from the Knowledge component in Lightning Experience and Lightning Experience console, and from the Articles related list in Salesforce Classic and Salesforce Classic console. Attach article to work orders and work order line items from the Knowledge component on work orders and work order line items in Lightning Experience and Lightning Experience console, from the Articles related list in Salesforce Classic, and from the Knowledge One widget in Salesforce Classic console.

Articles on work types behave a little differently from articles on work orders and work order line items.

- A Linked Work Types related list isn't available on article page layouts, so you can't see which work types an article is attached to.
- The Knowledge One widget isn't available on work types in the console, but the Articles related list is.
- When work orders and work order line items inherit an article from their work type, they inherit the latest version of the article published in their org's default Knowledge Settings language.

Note:

- Unlike the Knowledge One console widget, the Knowledge Lightning component doesn't include article suggestions for work orders, work order line items, and work types.
- To support these changes, the linked article fields Article Version, Knowledge Article ID, and Linked Record ID fields are now required. Article Version is still optional on work type linked articles.

SEE ALSO:

[Salesforce Help: Guidelines for Using Knowledge with Work Orders \(can be outdated or unavailable during release preview\)](#)

Guide Your Team with Path for Field Service

Quickly track a record's stage in its life cycle with the help of Path, an eye-catching progress bar on record detail pages. Path is now available to track the status of work orders, work order line items, and service appointments.

Where: This change applies to Lightning Experience and Lightning communities in Enterprise, Performance, Unlimited, and Developer editions. Path for Field Service objects isn't available in Salesforce Classic, the Salesforce mobile app, or the Field Service Lightning mobile app.

Why: You might have seen Path on sales records like opportunities and leads. With Path, your team can quickly see a record's status and how close it is to completion, and update the status by clicking the desired value on the path.

The screenshot shows a Work Order record for 'Install Solar Panel System' with ID 00000002. The path consists of three stages: 'In Progress' (active), 'On Hold', and 'Final Status'. Below the path, there are key fields for Subject, Description, and Location, along with a 'GUIDANCE FOR SUCCESS' section explaining the 'In Progress' status.

You can set up one path per record type. The steps in a path (1) correspond to the Status picklist values. Help agents succeed by displaying up to five key fields and handy step-specific guidance beneath each path step (2). Key fields and guidance are collapsed by default; to expand them, click the caret to the left of the path.

Because several statuses on work orders, work order line items, and service appointments can represent the record's conclusion—Canceled, Cannot Complete, Completed, and Closed—users are prompted to select a final status from these values when they try to close the record. A negative final status (Canceled or Cannot Complete) appears in red, while positive statuses are green. The order of the path steps is based on the order of the values in the Status picklist, though statuses representing conclusion are grouped in the final step.

How: On the Path Settings page in Setup, enable Path and create a path for the Work Order, Work Order Line Item, or Service Appointment object. You can base a path on the Status field or a custom picklist.

In Setup, assign a status category to each Status value from the field settings for each object. Status categories determine which statuses are grouped in the Final Status stage on the path.

Status Picklist Values					
Action	Values	API Name	Status Category	Default	
Edit Deactivate	New	New	New	<input checked="" type="checkbox"/>	
Edit Del Deactivate	In Progress	In Progress	In Progress	<input type="checkbox"/>	
Edit Del Deactivate	On Hold	On Hold	On Hold	<input type="checkbox"/>	
Edit Del Deactivate	Completed	Completed	Completed	<input type="checkbox"/>	
Edit Del Deactivate	Closed	Closed	Closed	<input type="checkbox"/>	
Edit Del Deactivate	Cannot Complete	Cannot Complete	Cannot Complete	<input type="checkbox"/>	
Edit Del Deactivate	Canceled	Canceled	Canceled	<input type="checkbox"/>	

After you create your path, drag the Path component onto the appropriate Lightning record page layout in your org using the Lightning App Builder, or onto a Lightning community page using Community Builder.

SEE ALSO:

[Salesforce Help: Guide Users with Path \(can be outdated or unavailable during release preview\)](#)

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

Automate Work Order Generation for Maintenance Plans

Sit back, put your feet up, and watch the work orders roll in! A new feature on maintenance plans kicks off the generation of a new batch of work orders whenever the current batch nears completion. You can choose how far in advance a new batch is generated and opt to pause generation if the current batch's last work order is still open.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Maintenance plans let you mass-produce work orders for periodic visits related to a customer's asset. For example, if a service contract for an elevator requires monthly preventive maintenance visits, you can create a batch of up to 2,500 work orders for future visits.

Previously, you had to click a button on your maintenance plan to generate a new batch of work orders. Now you can opt to have a new batch of work orders generated whenever the current batch nears completion. This option helps you stay on top of your maintenance schedule for assets that qualify for ongoing maintenance.

Here's a summary of the new settings:

- The **Auto-generate work orders** checkbox on maintenance plans turns on auto-generation of work order batches for a maintenance plan, and prohibits the manual generation of work orders via the Generate Work Orders action.
- The **Generation Horizon (Days)** numeric field on maintenance plans moves up the timing of batch generation.
- When the **Generate new batch upon completion** checkbox on maintenance plans is selected, a new batch of work orders isn't generated until the last work order generated from the maintenance plan is completed.
- The read-only **Generated from maintenance plan** checkbox on work orders indicates that the work order was generated from a maintenance plan, rather than manually created.
- The **Date of the first work order in the next batch** date field on maintenance assets lists the suggested date of service for the maintenance asset's first work order (not the date the work order is created). This corresponds to the work order's Suggested Maintenance Date, and auto-updates after each batch is generated.

How: The new fields are automatically visible on default page layouts in orgs created in Summer '18 or later. If your org was created before Summer '18, add the fields to your page layouts and configure their field-level security.

SEE ALSO:

[Changed Objects](#)

[Salesforce Help: Create Maintenance Plans \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Maintenance Plan Fields \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Generating Work Orders from a Maintenance Plan \(can be outdated or unavailable during release preview\)](#)

View Related Maintenance Plans on Accounts, Contacts, and Locations

Make things easier for your support team by adding the Maintenance Plans related list to account, contact, and location page layouts. This related list lets agents quickly see an account's or contact's active maintenance plans, and determine whether a location (like a customer site) is associated with a maintenance plan.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: From the page layout editor in Setup, drag the Maintenance Plans related list onto the detail pages for accounts, contacts, and locations.

Encrypt Data at Rest with Shield for Work Orders and Service Appointments

Shield Platform Encryption and Field Audit Trail are now available for certain fields on work orders, work order line items, and service appointments. You can store field values for up to 10 years and encrypt supported fields to provide an extra layer of protection to your customers' data.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Shield Platform Encryption requires purchasing Salesforce Shield. To encrypt fields, you need the View Setup and Configuration and Customize Application permissions.

Why: Encryption boosts the security of your customers' data and helps you comply with privacy policies, regulatory requirements, and contractual obligations. The following fields are now available for Shield Platform Encryption on work orders, work order line items, and service appointments:


- Description
- Subject
- Address (Street and City only)

 **Note:** Encryption is not supported for the Latitude and Longitude fields.

Field Audit Trail, a component of the Shield service package, is also now available for all fields of supported types on work orders, work order line items, and service appointments. You can define a policy to retain archived field history data, independent of field history tracking. By default, data is archived after 18 months in a production org and after one month in a sandbox org. All archived data is stored for 10 years.

How: To encrypt these fields, add them to your Encryption Policy from Setup. The Subject and Address fields support both probabilistic and deterministic encryption, while the Description field supports only probabilistic encryption.

If Field Audit Trail is enabled, you can get started setting field history data retention policies for the fields whose data you want to retain.

 **Note:** When you encrypt a field, existing values aren't encrypted. Contact Salesforce for help encrypting existing data.

SEE ALSO:

[Salesforce Help: Encrypt New Data in Fields \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: General Shield Platform Encryption Considerations \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Field Audit Trail Implementation Guide \(can be outdated or unavailable during release preview\)](#)

Create Criteria-Based Sharing Rules for Field Service

Control who can view and update records. Criteria-based sharing is newly available for seven field service objects. You can define up to 50 criteria-based sharing rules per object.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Admins need the Manage Sharing user permission to create sharing rules.

Why: Criteria-based sharing gives you more granular control over your sharing settings. It's now available for the following field service objects:

- Location
- Product Item
- Return Order
- Service Appointment

- Service Resource
- Service Territory
- Work Type

For example, set up a sharing rule using the Location field on product items to share all product item records in your San Francisco warehouse with the warehouse manager.

How: Create sharing rules from the Sharing Settings page in Setup.

SEE ALSO:

[Salesforce Help: Criteria-Based Sharing Rules \(can be outdated or unavailable during release preview\)](#)

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

Filter Related Lists on Service Reports (Generally Available)

Bloated service reports got you down? Reduce the number of records that appear in related lists on service reports by adding filters to any service report template. This way, customers see only the records that they need.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Related list filters on service report templates let you remove unneeded records from service reports. Here are some ways to use filters to polish your service reports.

- On a work order service report template, create a filter in the Work Order Line Items related list that displays only closed line items.
- On a work order service report template, create two related lists that separate work order line items by status: one named “Line Items On Hold” and one named “Completed Line Items.”

When related list filtering on service reports was in beta, you could create only one filter per related list, and only picklist fields could be filtered. Now you can create up to five filters per related list, and filters can apply to either picklists or checkbox (Boolean) fields.

The screenshot shows the 'List Properties' dialog box for 'Work Order Line Items'. The 'Filters' tab is selected, and the following filters are defined:

Field	Operator	Value
Is Closed	equals	true
Priority	includes	Medium,High
--None--	--None--	
--None--	--None--	
--None--	--None--	

The following filter operators (1) are available.

- For picklist fields: Includes or Excludes
- For checkbox fields: Equals or Not equals

Valid checkbox values (2) are True and False.

How: To set up a filter, open a service report template and click the wrench icon on the related list you want to filter. From the Filters tab, define up to five filters. Only records that list a selected value in the filter field appear in service reports that use the template.

 **Note:**

- Deactivated picklist values don't appear in the lookup, but you can enter them manually.
- Filter settings are visible only from the Filters tab.
- The Status field on contract line items isn't available for filtering, and the Filters tab isn't available in Internet Explorer 8.

SEE ALSO:

[Salesforce Help: Create Service Report Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guidelines for Customizing Service Report Templates \(can be outdated or unavailable during release preview\)](#)

[Encrypt Fields on Work Orders and Service Appointments](#)

Manage Field Service in Lightning Communities

Sharing field service data with partners, contractors, and customers just got easier. All Field Service Lightning standard objects are now available in Lightning communities. Field service objects were already available in communities built using Salesforce Tabs + Visualforce, but previously only work orders, work order line items, and service appointments were available in Lightning communities.


Where: This change applies to Lightning communities, Salesforce Tabs + Visualforce communities, and all versions of the Salesforce app.

Why: If you use a community to connect with your business partners, employees, or customers, keeping the communication lines open is key to your field service success. For example, add return orders and return order line items so that customers can see the status of their returns. Or, add service resources so that partners can see resources' skills and start date.


You can add the following field service objects to Lightning communities.

- Address
- Asset Relationship
- Assigned Resource
- Associated Location
- Location
- Maintenance Asset
- Maintenance Plan
- Operating Hours
- Product Consumed
- Product Item
- Product Item Transaction
- Product Request
- Product Request Line Item
- Product Required
- Product Transfer
- Resource Absence
- Resource Preference
- Return Order

- Return Order Line Item
- Service Appointment (previously available)
- Service Crew
- Service Crew Member
- Service Report
- Service Resource
- Service Resource Capacity
- Service Resource Skill
- Service Territory
- Service Territory Location
- Service Territory Member
- Shipment
- Skill Requirement
- TimeSheet
- Time Sheet Entry
- Time Slot
- Work Order (previously available)
- Work Order Line Item (previously available)
- Work Type

 **Note:** This list doesn't include objects that aren't unique to field service, such as assets, accounts, and contacts. In addition, linked articles, which are knowledge articles attached to field service objects, aren't supported in Lightning communities.

How: To expose a field service object in a Lightning community, make a new object page in Page Manager in Community Builder. When prompted, choose an object. Page Manager creates three related pages for the new object page: a record detail page, a record list page, and a related list page. Add the object to your community's navigation bar, and you're all set.

 **Tip:** Review the field-level security on objects you add to your community to make sure that customers and partners see only the fields that they need.

SEE ALSO:

[Salesforce Help: Objects Supported by Out-of-the-Box Components and Pages in Community Templates \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Field Service Lightning Objects \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Field Service in Communities \(can be outdated or unavailable during release preview\)](#)

Create Larger Service Territory Hierarchies

A hierarchy of service territories can now contain up to 10,000 service territories. Previously, the limit was 500. Depending on how you use territories, your number of hierarchies could get big, so we relaxed the limit to spare you any headache.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Service territories typically represent geographical areas where your field service team works. However, you may decide to create functional territories, such as field sales versus field service.

How: Organize service territories into a hierarchy using the Parent Service Territory field and the Child Service Territories related list. We recommend creating the highest-level territories first. The new limit applies automatically to field service customers; no setup needed!

Edit the Currency Code on Time Sheets

Life sometimes pays you in unexpected ways. Let your mobile workforce change the currency listed on their time sheets to reflect the currency used in their service appointments. The Currency ISO code on time sheets and time sheet entries is now editable in the user interface.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: The Currency ISO Code field is only available if the multicurrency feature is enabled in your org. All users with edit permission on time sheets can update the currency code.


Why: Previously, the Currency ISO Code field on time sheets and time sheet entries could only be updated using the API. Now, if needed, technicians logging their travel and labor hours can update the currency. For example, if a dispatcher in Germany creates a service appointment for a team in Denmark, the technician can change the currency from EUR (euro) to DKK (Danish krone) to be paid in the local currency.

How: To let your team update the currency on time sheets, make sure that the Currency ISO Code field (API name: `CurrencyIsoCode`) is added to your time sheet and time sheet entry page layouts.

Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments (Beta)

Snap-ins Appointment Management (beta) gives your customers an easy way to schedule, modify, and cancel appointments with your mobile workforce. The experience is powered by Visual Workflow, which means you can craft the perfect interaction and decide when and how to create related records like work orders.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed and using version 5.0 or later of the Snap-ins code snippet.

 **Note:** As a beta feature, Snap-ins Appointment Management is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: Community users with the FSL Self Service permission set. Administrators with the FSL Admin permission set.

How: This beta feature requires you have an established field service system with Field Service Lightning and the Field Service Lightning managed package and an active Salesforce Community. To let customers manage appointments in your community, you must enable Snap-ins Appointment Booking and install and configure the FSL Scheduling Flows.

SEE ALSO:

[Support Community Appointment Management \(Beta\)](#)

Field Service Managed Package: Resource Schedule Optimization, Gantt Live Updates, and Custom List Filters

Optimize a resource's day to better handle last-minute changes. Watch your changes update immediately on the Gantt. Let dispatchers make their own list views with custom filters.

IN THIS SECTION:

[Optimize the Day, One Resource at a Time](#)

The dynamic nature of the service day can make a mess out of your perfect schedule. Get a handle on last-minute schedule changes with Resource Schedule Optimization. Resource Schedule Optimization quickly optimizes a single technician's schedule without affecting other schedules.

[Improve Dispatcher Experience with Live Gantt Updates \(Beta\)](#)

Get live updates on Gantt objects. Changes to resource absence, service appointment, assigned resource, service resource capacity, service resource (live positions), and optimization request are reflected in real time on the Gantt. Previously, dispatchers waited between 1 to 10 seconds to get an update.

[Customize Dispatcher Console List Views with Custom Filters](#)

List views in the Field Service managed package are now similar to the list views you are familiar with in Salesforce. Give dispatchers the power to create the list views they need with custom list filters based on Boolean expressions. They can determine the time period by Horizon date or Gantt dates and apply complex filter logic. Filters can be private or shared with others.

[Factor in Secondary Territory Member's Operating Hours](#)

The Scheduling Engine now respects your resources' availability in their secondary territories. In addition, when viewing available technicians in a territory, you can now see secondary territory members' hours of availability in the territory.

[Enhanced Dispatcher Console Experience](#)

In Summer '18, we made many enhancements to the Dispatcher Console experience for the dispatcher. An admin can change the Dispatcher Console settings so the Gantt loads faster. The changes dispatchers make on the console are now remembered.

[Streamline Dispatcher Console Tasks](#)

In Summer '18 and beyond, your dispatchers are more successful with route reviews, more accurate technician travel estimates, clearer optimization errors, and more.

[Support Community Appointment Management \(Beta\)](#)

The Field Service Lightning managed package has a new permission set to support the new beta snap-in for community appointment management.

[Other Enhancements in the Field Service Lightning Managed Package](#)

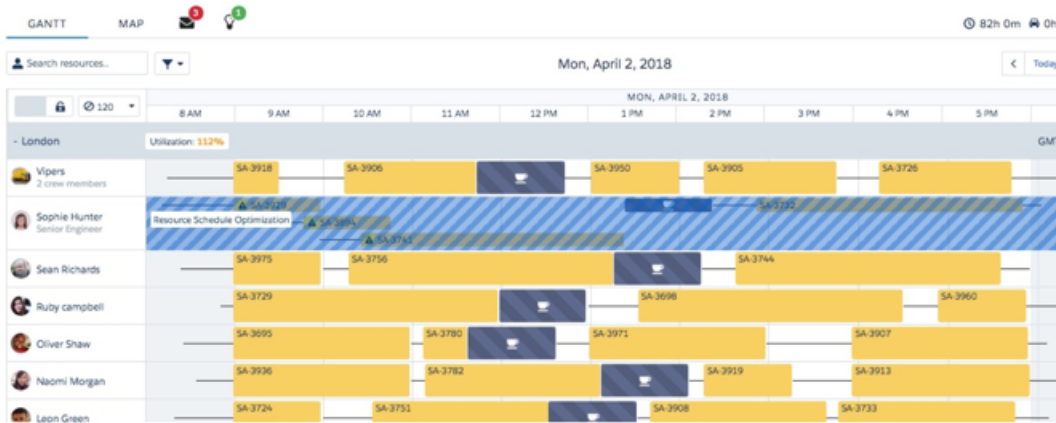
Optimize the Day, One Resource at a Time

The dynamic nature of the service day can make a mess out of your perfect schedule. Get a handle on last-minute schedule changes with Resource Schedule Optimization. Resource Schedule Optimization quickly optimizes a single technician's schedule without affecting other schedules.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Who: Dispatchers with the FSL Dispatcher Permissions set and the Resource Schedule Optimization custom permission.

How: Admins must assign the Resource Schedule Optimization custom permission to dispatchers who run optimization on individual resources. Dispatchers see and use Resource Schedule Optimization on the Gantt.



Improve Dispatcher Experience with Live Gantt Updates (Beta)

Get live updates on Gantt objects. Changes to resource absence, service appointment, assigned resource, service resource capacity, service resource (live positions), and optimization request are reflected in real time on the Gantt. Previously, dispatchers waited between 1 to 10 seconds to get an update.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Note: As a beta feature, Live Gantt Updates is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: Dispatchers with the FSL Dispatcher Permissions set and the FSL Streaming API custom permission set. Administrators with the FSL Admin Permissions set and the FSL Streaming API custom permission set.

How: To enable go to the Field Service Admin app. From Field Service Settings, go to **Dispatcher Console UI > Updating the Gantt** and click **Gantt Updates are Enabled Org Wide**. Admins need to assign the FSL Streaming API custom permission set to dispatchers.

Note: Live Gantt Updates are only supported if your sharing model is set to private for the Service Appointment, Service Resource, and Optimization Request objects.


Customize Dispatcher Console List Views with Custom Filters

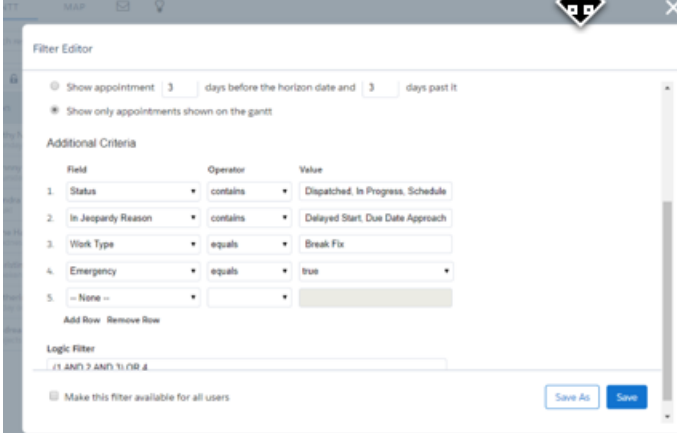
List views in the Field Service managed package are now similar to the list views you are familiar with in Salesforce. Give dispatchers the power to create the list views they need with custom list filters based on Boolean expressions. They can determine the time period by Horizon date or Gantt dates and apply complex filter logic. Filters can be private or shared with others.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Who: Dispatchers need the FSL Dispatcher Permissions set and the Create Filter custom permission to create, edit, and delete personal custom filters from the dispatcher console. To share or hide custom filters via the **Make this filter available for all users** setting, they also need the Publish Filter custom permission.

How: To enable custom filters, go to the Field Service Admin app. From Field Service Settings, go to **Dispatcher Console UI** and select **Enable Custom Filters**. When you create or edit a custom filter, select **Make this filter available for all users**. Otherwise, the filter is visible only to you.

 **Note:** Field Service custom filters replace the existing custom list view functionality. Therefore, after you enable custom filters, all existing custom list views are no longer accessible.




Factor in Secondary Territory Member's Operating Hours

The Scheduling Engine now respects your resources' availability in their secondary territories. In addition, when viewing available technicians in a territory, you can now see secondary territory members' hours of availability in the territory.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Who: Dispatchers with the FSL Dispatcher Permissions set.

 **Note:** Secondary hours must be within the primary territory hours. For example, if a technician is available 8 AM to 8 PM in their primary territory, the technician can't be available before 8 AM or after 8 PM in a secondary territory.

Enhanced Dispatcher Console Experience

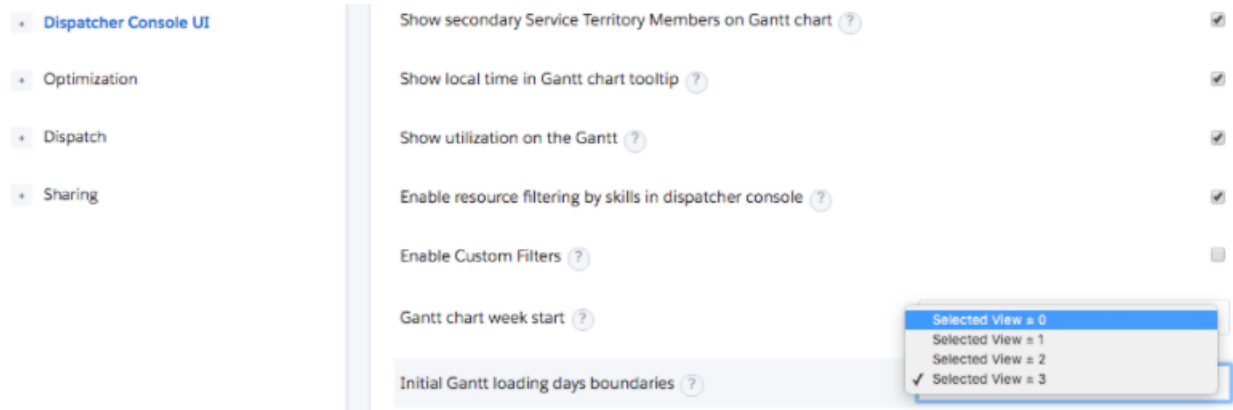
In Summer '18, we made many enhancements to the Dispatcher Console experience for the dispatcher. An admin can change the Dispatcher Console settings so the Gantt loads faster. The changes dispatchers make on the console are now remembered.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

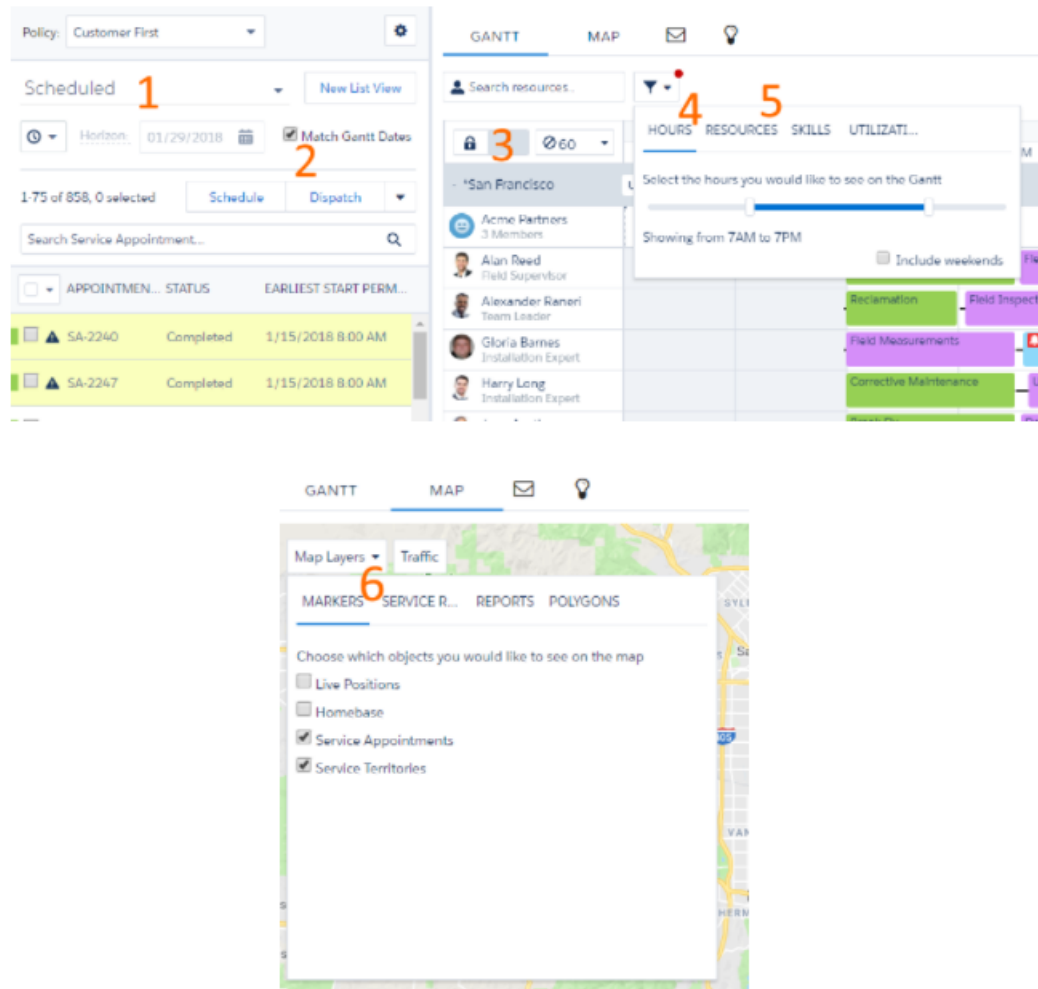
Who: Dispatchers with the FSL Dispatcher Permissions set.

How:

- **Control the number of days loaded to the Gantt:** By default, the Gantt is loaded with extra 2 days backward and forward in regards to the selected view resolution. For example, if the selected view is a daily view and the horizon date is set to May 3rd, the Gantt loads May 1st, 2nd, 3rd, 4th, and 5th. The dispatcher can navigate between dates without waiting for those days to be loaded. Now you can control how many additional days are loaded, 3, 2, 1 or 0 days from the horizon date. Organizations with a large number of daily service appointment can load less days, ensuring more appointments could be loaded to the Gantt. To set this preference, go to the Field Service Admin app. From Field Service Settings, go to **Dispatcher Console UI** and set the **Initial Gantt loading days boundaries** picker.



- **Load Gantt chart on Today's Date:** Dispatcher console users can now set the Gantt to load on today's date. Users who typically use the Gantt to plan future days might want to keep current behavior of loading the last date selected by the user. Other users, who typically use the Gantt to oversee daily work execution, might want to set the new setting to load on today's date. To set this preference, from the dispatcher console, click the settings icon, then click **Dispatch console settings**. Select **Load gantt chart in today's date**.
- **Preference Consistency:** Dispatchers can adjust interface controls to get the view that works best for them. Now, the dispatcher Console remembers the user's preferences so that they don't reconfigure the view after each load. The following preferences are remembered by the dispatcher console.
 1. The selected filter for the Service Appointment list
 2. The Match Gantt Dates checkbox
 3. Gantt lock
 4. Hours filter
 5. Resources filter
 6. Map markers



- Disable Skills Filter on the Gantt:** The skills filter allows filtering the Gantt to only show service resources that have certain skills. Therefore, the dispatcher console loads all skill related data. For organizations working with many skills per resource, loading can take significant amounts of time or even hit apex cpu time limits. Now, you can control whether the skills filter is enabled or not. If your dispatchers are not using the Skills filter, or there are many Service Resources with many skills to be displayed on the Gantt, it would be a good idea to disable the Skills filter. To set this preference, go to the Field Service Admin app. From Field Service Settings, go to **Dispatcher Console UI** and select **Enable resource filtering by skills in the dispatcher console**.

Streamline Dispatcher Console Tasks

In Summer '18 and beyond, your dispatchers are more successful with route reviews, more accurate technician travel estimates, clearer optimization errors, and more.

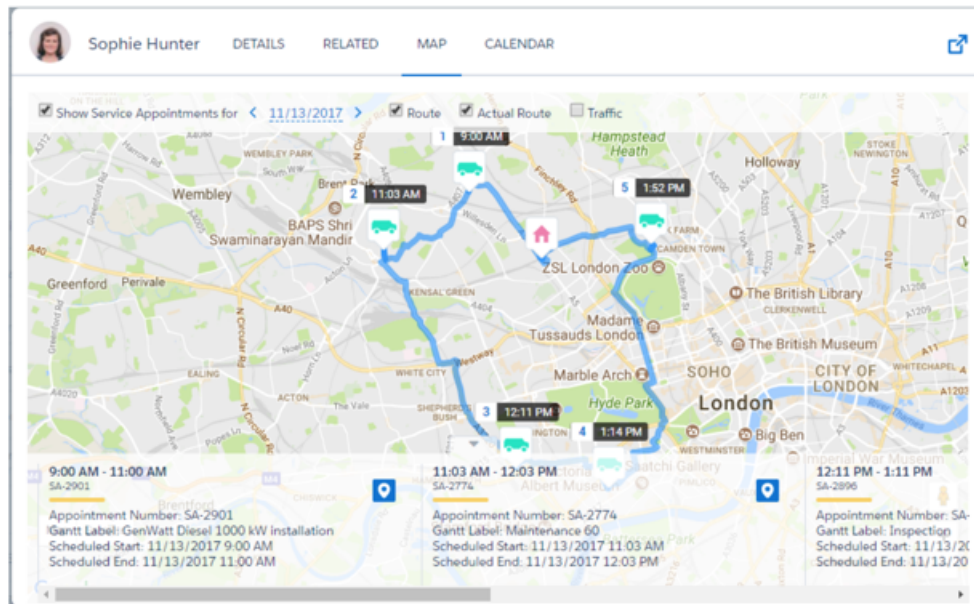
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Who: Dispatchers with the FSL Dispatcher Permissions set.

Why:

- Switch between days on a resource's daily route:** To suggest more efficient paths, quickly review the paths a technician takes from day-to-day. A commonly used feature in the dispatcher console is the daily route map, accessible through the service resource light box. We've made it even more useful with navigation between days at the top of the map in blue and service appointments

with detail boxes at the bottom. When evaluating a service resource route over several days, you previously had to reopen the date picker and click the date you want to be displayed. Now, you can use the 'next' and 'previous' controls to quickly and easily achieve the same goal.

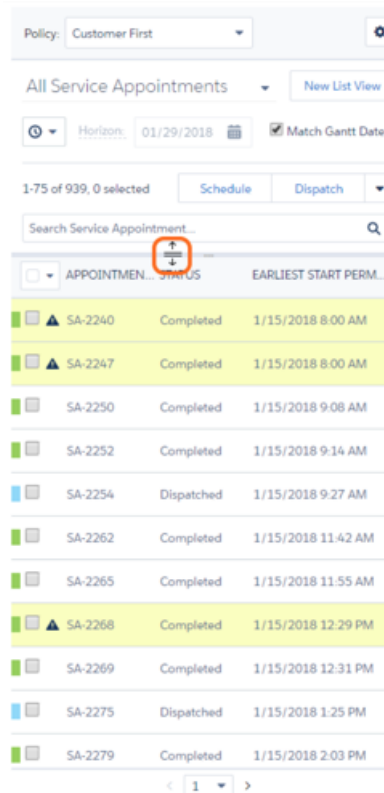


- **Ignore a technician's first and last trips of the day:** Minimize travel time in your field service schedules. When your mobile workers don't check into a dispatch center, there's no need to consider their personal travel time in their daily work schedule. Ignoring the first and last trips in their day gives you more accurate daily travel time.
- **Emergency Chatter Action Enhancements:** Now the Emergency Chatter action displays each candidate's next scheduled Service Appointment and the time it scheduled to start - click on a link to open the Service Appointment in a new tab and drill down to the details of the assignment to decide whether this candidate is the right person for the job. Additional icons are now available to indicate whether the candidate is a Required or Excluded Resource for the Emergency Service Appointment.
 - **Next Service Appointment:** Up until Summer 18', the Emergency Wizard allowed Agents and Dispatchers to immediately identify whether the Service Resource is currently working on another Service Appointment ('Current Service'). Summer '18 brings an additional improvement - now you can view the Resource's next assignment and the time it's scheduled to start, to avoid dispatching an emergency work to technicians currently on their way to tend to a high priority job or another emergency.
 - **Additional Resource Preferences are now visible in the Emergency Action:** Knowing the Resource Preferences can be crucial when you need to decide who's the best candidate for the emergency job. In addition to the Preferred Resources, additional icons are available for the Excluded and the Required Resources, according to what's defined on the Work Order.
- **Access more information about optimization errors:** In Summer '18, we've updated the error messages associated with schedule optimization. Your dispatchers now have a clearer idea of what the possible problems are.
- **New Field on optimization Request Object to surface Errors:** Now there's more information to troubleshoot an optimization request failure. Simply add the field "Failure Details" to the layout of the Optimization Request object.
- **Easier manual scheduling with snap-to:** Sometimes, when scheduling manually, you want a service appointment to start right after the previous one ends, with a suitable gap for driving time. Previously, you had to use trial to find the correct time. Now, you can use the new snap-to capability to quickly achieve the same result.

Once dragging the service appointment to be moved, simply hold down the ctrl key. An indication that Snap mode is active appears above the Gantt next to the designated start and end times. Drop the service appointment to overlap with the start or end of an

adjacent service appointment. The service appointments automatically arrange in the right order with the correct gap for driving time.

- **Adjust the size of filter pane:** The left side of the dispatcher console holds the filter pane and the service appointments list. Once setting your filter, you might want to free up the real-estate and see more Service Appointments. Now you can! Simply drag the pane border to adjust the size that is allocated for it.



Support Community Appointment Management (Beta)

The Field Service Lightning managed package has a new permission set to support the new beta snap-in for community appointment management.

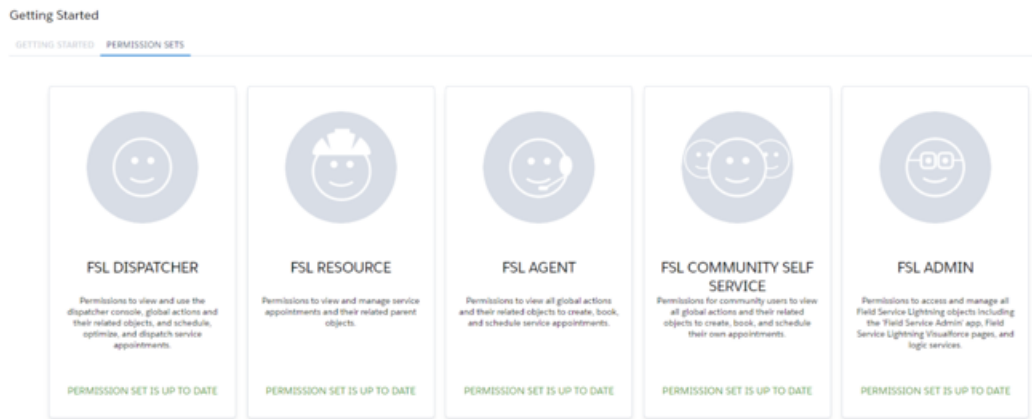
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Note: As a beta feature, Snap-ins Appointment Management is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: Administrators with the FSL Admin permission set. Community users with the FSL Self Service permission set.

Why: Give your customers a stellar appointment management experience with Snap-ins Appointment Management (beta).

How: Go to the Field Service Admin app. From Field Service Settings, go to **Getting Started > Permission Sets** and click **FSL Self Service**.



SEE ALSO:

[Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments \(Beta\)](#)

Other Enhancements in the Field Service Lightning Managed Package

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

Why: The following improvements were added to help you do more with Field Service Lightning.

Optimization Advanced Settings (Closed Pilot)

The following new fields on the Service Territory and Scheduling Policy objects are part of a closed pilot and enrollment is closed.

- Service Cluster Min Size (on the Service Territory object)
- Service Cluster Proximity (on the Service Territory object)
- Travel Mode (on the Scheduling Policy object)
- Service Priority Weight (on the Scheduling Policy object)
- Service Clustering Weight (on the Scheduling Policy object)

Adjusting these fields doesn't effect orgs that aren't part of the closed pilot. They are tailored to specific business requirements for optimization.

Enhancements to the Distance From Home Work Rule

If your business rules require you to avoid using the Match Territories and Working Territories work rules (a rare use case), the Distance From Home work rule is enhanced to better support your service optimization. The best practice is still to use the Match Territories and Working Territories work rules.

Integrity Checker Hidden by Default

The integrity checker, an rarely needed feature, under Scheduled Jobs is hidden by default.

Summer '18 Permission Sets don't have Delete Permissions on Service Appointments and Work orders

Organizations new to Field Service Lightning in Summer '18 and beyond have permissions sets without delete permissions on service appointments and work orders. If your org enabled Field Service Lightning before Summer '18, we recommend updating the permission sets manually and removing the delete permission for service appointments and work orders. Once the delete permission is removed, it won't be added when you update your permission sets with the Field Service Lightning Managed Package.

Field Service for Mobile: Android 4.0

Version 4.0 brings some of your favorite features that were previously only available in the iOS version to the Android version of Field Service Lightning. Here's a quick list, just to name a few. Use quick actions to give your users flows, created in the Cloud Flow Designer. Consume products from multiple inventory locations. Use dependent picklists to set your users up for success. Provide useful images in Knowledge articles. Provide multiple custom listviews for users to control the schedule screen. Control the display of resource absences on the profile tab with layouts. And so much more.



Tip: The version 4.0 update to Field Service Lightning for Android is available from Google Play in the middle of July 2018. Users can utilize the features documented in this section after installing or upgrading to version 4.0.

IN THIS SECTION:

[Connect Flows as Quick Actions](#)

Provide your Android users with custom flows created in the Cloud Flow Designer through quick actions. Because quick actions are configured by page layout, you can add different flows to different page layouts to assign to users. For multilingual orgs, you can also localize the quick action labels. Previously, you had to connect flows to Field Service Lightning as app extensions.

[Use Lightning Actions in the Field Service App \(Android and iOS\)](#)

A new profile-based setting lets you display mobile and Lightning Experience actions on records in the Field Service Lightning mobile app. These actions appear in place of app extension and Salesforce Classic Publisher actions.

[Create Custom List Views for the Schedule Screen](#)

Give your mobile workforce more ways to control the schedule screen. List views give the ability to populate the schedule screen with service appointments based on different configurable filter criteria.

[Make the Right Choice with Dependent Picklists](#)

Your users don't need any extra clutter on their screen. Limit what shows up in the user interface with dependent picklists. A dependent picklist provides a subset of options to choose from. Users see only options that are relevant to their situation.

[Illustrate Your Point with Images in Knowledge Articles](#)

Users can now view images in knowledge articles that they open in Field Service Lightning for Android. With support for images in knowledge articles, your knowledge authors can create instructions that visually illustrate their point, so users quickly and clearly understand the content.

[Consume Products from Multiple Locations \(Beta\)](#)

Your mobile workforce can now add products from multiple locations to the Products Consumed related list when completing work. Previously, a work order's or line item's consumed products could only be associated with a single location. Also, a new location filter on products consumed lets mobile users narrow your product item searches to specific locations.

[Maximize Screen Space by Customizing Resource Absences](#)

Control which fields your mobile workforce sees when they view resource absences in the Field Service Lightning profile tab. Remove fields that your users aren't interested in, and prominently display the most relevant ones.

[Save Time with the Barcode Scanner](#)

Work smarter, not harder. The barcode scanner lets your mobile workforce use their mobile device's camera to copy 1D serial barcodes and 2D QR codes into any string, text area, number, and reference field in edit mode.

[Capture Multiple Signatures on Service Reports](#)

Efficiently capture and keep track of signatures on service reports using templates that have multiple signature blocks.

[Restrict Creating or Updating Products Consumed by Default](#)

By default mobile workers can't create or update products consumed. To allow your staff to create or update products consumed via their phones, create and assign a permission set with the create and update products consumed permissions.

[See Available Time Slots by Month](#)

The date picker can expand to a monthly view when many days are available.

[Support Multiday Appointments](#)

Configure service appointments to span as long as your work orders require.

[Create a Product Request](#)

Let your mobile workers request that needed part while viewing the work order or while browsing the products list.

[Other Enhancements to Service Reports](#)

Check out the usability enhancements to Field Service Lightning service reports.

[Online Documentation Parity](#)

Navigation and search in the documentation just got twice as easy. With so little differences between mobile platforms, we've consolidated the mobile documentation into one set and created a small user guide. However, if you've bookmarked any Android help topics those are invalid.

Connect Flows as Quick Actions

Provide your Android users with custom flows created in the Cloud Flow Designer through quick actions. Because quick actions are configured by page layout, you can add different flows to different page layouts to assign to users. For multilingual orgs, you can also localize the quick action labels. Previously, you had to connect flows to Field Service Lightning as app extensions.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

Use Lightning Actions in the Field Service App (Android and iOS)

A new profile-based setting lets you display mobile and Lightning Experience actions on records in the Field Service Lightning mobile app. These actions appear in place of app extension and Salesforce Classic Publisher actions.

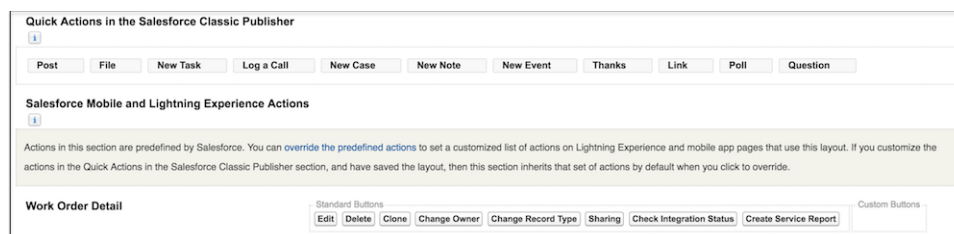
Where: This change applies to Salesforce Classic, Lightning Experience, and the Field Service Lightning mobile app for Android and iOS.

When:

Important: This setting is read-only until the Field Service Lightning app for iOS and Android is updated to version 5.0.


Why: Previously, the Field Service Lightning mobile app only displayed actions from app extensions and the Salesforce Classic Publisher. Now, you can configure the app to display Lightning Experience and mobile actions instead.

Record detail page layouts have two sections: "Quick Actions in the Salesforce Classic Publisher" and "Salesforce Mobile and Lightning Experience Actions." You can now update any Field Service Lightning mobile settings configuration so that app users see only the actions in the second section.



How: This setting is off by default, so users only see changes if you enable it for them. Here's how to enable the new setting for one or more user profiles.

From the Field Service Mobile Settings page in Setup, click **Edit** next to the mobile settings configuration you want to update. Select **Use Salesforce Mobile Actions**, and save your changes. We recommend checking your mobile settings assignments to confirm that the right user profiles are using the mobile settings configuration.

 **Note:** This setting affects the mobile app experience only. Users don't see changes on the full Salesforce site.

Create Custom List Views for the Schedule Screen


Give your mobile workforce more ways to control the schedule screen. List views give the ability to populate the schedule screen with service appointments based on different configurable filter criteria.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

Who: To create custom list views, you need Read access on service appointments and the Create and Customize List Views user permission. To create, edit, or delete public list views, you need the Manage Public List Views user permission.

How: Use the app launcher to navigate to Service Appointments. Then use the list view controller to create Service Appointment list views. To configure the use case for your list view, click **Edit List Filters**. To control which fields are shown in the app on the schedule screen, use Selected Fields to Display.

 **Tip:** Records that are included in custom list views are not automatically primed. Only the default list view, which you can specify in Setup under Field Service Mobile Settings, is available offline.

Make the Right Choice with Dependent Picklists

Your users don't need any extra clutter on their screen. Limit what shows up in the user interface with dependent picklists. A dependent picklist provides a subset of options to choose from. Users see only options that are relevant to their situation.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

Illustrate Your Point with Images in Knowledge Articles


Users can now view images in knowledge articles that they open in Field Service Lightning for Android. With support for images in knowledge articles, your knowledge authors can create instructions that visually illustrate their point, so users quickly and clearly understand the content.

Where: This change applies to Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions. Knowledge must be set up in your org.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

Consume Products from Multiple Locations (Beta)

Your mobile workforce can now add products from multiple locations to the Products Consumed related list when completing work. Previously, a work order's or line item's consumed products could only be associated with a single location. Also, a new location filter on products consumed lets mobile users narrow your product item searches to specific locations.

 **Note:** As a beta feature, product consumption from multiple locations is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within

any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for this feature in the IdeaExchange.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

How: To enable the multiple locations feature, create a connected app setting for the **Salesforce Field Service for Android** connected app. For help setting up connected app settings, visit the links below.



Note: Consuming products from multiple locations is supported for:

- Up to 10 hierarchical locations or up to 10 cross border locations, sorted by last modified date, and
- Up to 1000 product items returned for each location.

Maximize Screen Space by Customizing Resource Absences

Control which fields your mobile workforce sees when they view resource absences in the Field Service Lightning profile tab. Remove fields that your users aren't interested in, and prominently display the most relevant ones.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

How: In Setup, modify the page layout for service resources. From the page layout for service resources, modify the related list layout for resource absences. The Start Time and End Time fields display prominently as headers if they're included in the related list layout's selected fields. Up to three additional fields that you specify appear below the header.

Save Time with the Barcode Scanner

Work smarter, not harder. The barcode scanner lets your mobile workforce use their mobile device's camera to copy 1D serial barcodes and 2D QR codes into any string, text area, number, and reference field in edit mode.

Where: This change applies to Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

How: Access the barcode scanner from any supported field by clicking the barcode widget on the field.

Capture Multiple Signatures on Service Reports

Efficiently capture and keep track of signatures on service reports using templates that have multiple signature blocks.

Where: This change applies to Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July, 2018.

How: Your mobile workforce can now collect multiple signatures on service reports that have multiple signature blocks, making it possible for service reports to be signed by your technicians, customers, and partners alike. Each signature block has a unique signature type so your mobile workforce always know who needs to sign where in a service report.

Restrict Creating or Updating Products Consumed by Default

By default mobile workers can't create or update products consumed. To allow your staff to create or update products consumed via their phones, create and assign a permission set with the create and update products consumed permissions.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

See Available Time Slots by Month

The date picker can expand to a monthly view when many days are available.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

How: If more than nine days are available, the date picker expands to a monthly calendar instead of the inline view. In the monthly view:

- Mobile workers can swipe or use arrows to change months.
- Days outside the date range are disabled.
- If all available days fit within the current month, the arrows are hidden and swipe disabled.

Support Multiday Appointments

Configure service appointments to span as long as your work orders require.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

How: When creating multiday appointments for your mobile workforce, keep in mind the following considerations:

- Using both the `Scheduled Start` and `Scheduled End` fields on service appointments causes that appointment to appear on the schedule for every day between those two dates and show a visual progress bar representing the job's scheduled completion.
- Setting a service appointment to have a `Scheduled End` time but not a `Scheduled Start` time causes the appointment to appear on the schedule for every day until the `Scheduled End` date.
- Setting a service appointment to have a `Scheduled Start` time but not a `Scheduled End` time causes that appointment to appear on the schedule for every day past the `Scheduled Start` until that appointment is completed.

Create a Product Request

Let your mobile workers request that needed part while viewing the work order or while browsing the products list.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

Why: Mobile workers can now create product requests from the products list request tab or directly from the work order. They don't have to navigate away from a work order when they need a tool, product, or part to finish the job.

Other Enhancements to Service Reports

Check out the usability enhancements to Field Service Lightning service reports.

Where: This change applies to Lightning Experience, Salesforce Classic, and Field Service Lightning for Android in Enterprise, Performance, Unlimited, and Developer editions.

When: Version 4.0 is available for download on Google Play in the middle of July 2018.

Why: The following improvements were added to help you do more with service reports.

- You can share service reports via email from the PDF view. Add the share button on the service report page layout.
- You can and your customers can preview service reports before printing or signatures. Admins can create a preview screen for service report preview.
- Add your company logo to the report preview. Admins can adjust the preview screen layout to include an image.
- A signature card is included on the Create Service Report screen. Mobile workers can identify when the correct signer isn't present, add a reminder to get a signature, clear the signature, and verify that the signature has been gathered.

Online Documentation Parity

Navigation and search in the documentation just got twice as easy. With so little differences between mobile platforms, we've consolidated the mobile documentation into one set and created a small user guide. However, if you've bookmarked any Android help topics those are invalid.

Channels: Live Agent Setup Flow, APIs for Lightning Experience, and Offline Support for Snap-Ins Chat

Get up and running fast with the new Live Agent and Snap-Ins Chat setup flow. And more Live Agent methods are available in the Lightning Console JavaScript API. You can also let your customers log a case when your chat agents are offline.

IN THIS SECTION:

[Live Agent: Chat Improvements in Lightning Experience](#)

Increase your agents' efficiency with productivity enhancements just for Lightning Experience. You can also guide agents through a chat with Lightning Guided Engagement. Agents can see new message notifications more easily with blinking tabs, and can preview files that are attached to chats in the Salesforce file browser.

[Snap-Ins Chat: Chat Improvements and the Version 5.0 Code Snippet](#)

Use Lightning components to customize the user interface of the minimized chat snap-in. Provide a case form to chat customers when your agents are offline. Upgrade your Snap-ins code snippet to version 5.0 to use appointment management and other new features.

[Snap-Ins for Mobile Apps: Create Better, Faster, Leaner Apps](#)

We reduced the footprint of the Snap-ins SDK because we no longer require the Salesforce Mobile SDK as a dependency. We streamlined the authentication process for authenticated Knowledge and Case Management. We also jazzed up the Live Agent Chat user experience with prettier chat bubbles and an animated typing indicator.

[CTI: Guide Your Call Center Agents with Flows](#)

Guide your call center agents through multi-step processes with Lightning Guided Engagement. Incoming calls can screen-pop to a record page with a list of flows for the call center agent to complete. The first flow can even auto-launch so that your agents know right where to start. Call data, such as a phone number or customer name, can be passed directly into the flow when it's screen-popped.

Live Agent: Chat Improvements in Lightning Experience

Increase your agents' efficiency with productivity enhancements just for Lightning Experience. You can also guide agents through a chat with Lightning Guided Engagement. Agents can see new message notifications more easily with blinking tabs, and can preview files that are attached to chats in the Salesforce file browser.

IN THIS SECTION:

[Resolve Cases with Chat and Lightning Guided Engagement](#)

Walk your agents through your business processes with Lightning Guided Engagement. When a chat is accepted, agents see the chat, contact details, and flows you've defined that must be completed. Agents can see appropriate business processes right next to their chat because flows open as subtabs of the chat primary tab. Lightning Guided Engagement is great for your agents, and great for you—because you can configure all this functionality with clicks, not code.

[Catch Your Agent's Eye with Incoming Message Notifications in Live Agent](#)

When a customer responds to a chat, in addition to a red dot, the chat tab turns dark blue and blinks three times to notify the agent about the new message. This feature is automatically enabled for agents using Lightning Experience.

[Preview File Attachments in Live Agent in Lightning Experience](#)

Support agents can preview file attachments sent or received in Live Agent chats in Lightning Experience. Chat file attachments now use the Files object, which is fully supported in Lightning Experience, instead of the Attachments object. The Attachments related list shows a thumbnail image of the file and the file size. Agents can click the file to preview it in the file browser. This feature is automatically enabled in Lightning Experience.

[Customize the Live Chat Visitor Page in Lightning Experience](#)

We added a preconfigured Lightning page for the Live Chat Visitor page for Live Agent, so admins who are designing their own Lightning console apps can customize it. Previously, the Live Chat Visitor page wasn't available in Lightning Experience.

[Set Up Live Agent in Lightning Experience with a Guided Setup Flow](#)

You don't have time to fiddle around in Setup to get started with Live Agent in Lightning Experience—your customers have questions now. The Live Agent guided setup flow configures Omni-Channel routing for chats, creates a basic Live Agent configuration, and set up an out-of-the-box Snap-ins Chat experience. Whether you're a web chat newbie or a Live Agent veteran who's curious about Lightning Experience, the guided setup flow gets you ready to go.

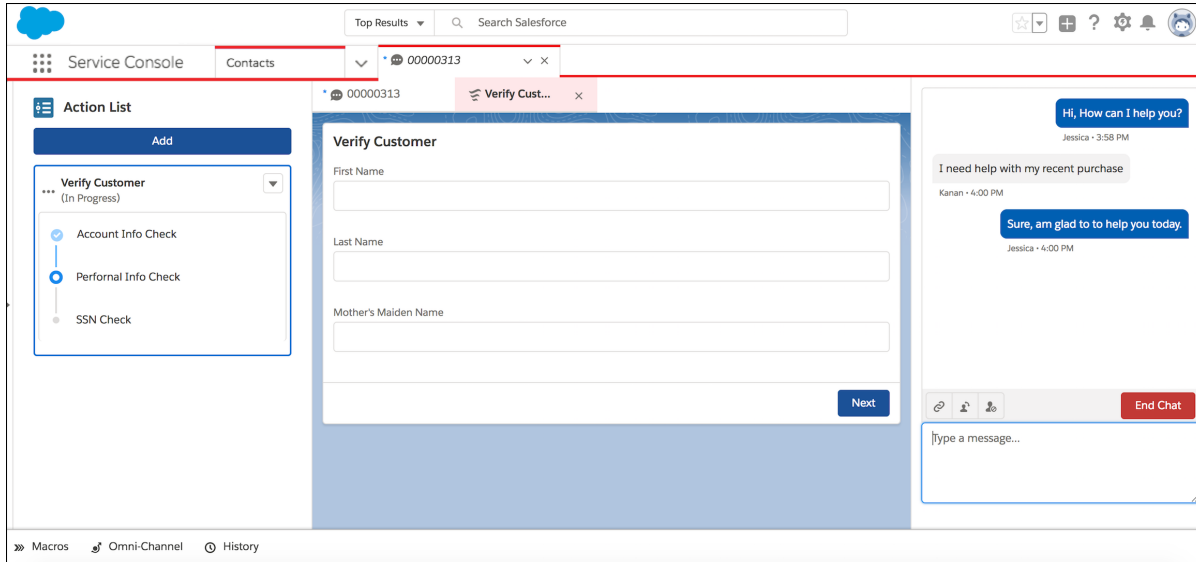
Resolve Cases with Chat and Lightning Guided Engagement

Walk your agents through your business processes with Lightning Guided Engagement. When a chat is accepted, agents see the chat, contact details, and flows you've defined that must be completed. Agents can see appropriate business processes right next to their chat because flows open as subtabs of the chat primary tab. Lightning Guided Engagement is great for your agents, and great for you—because you can configure all this functionality with clicks, not code.

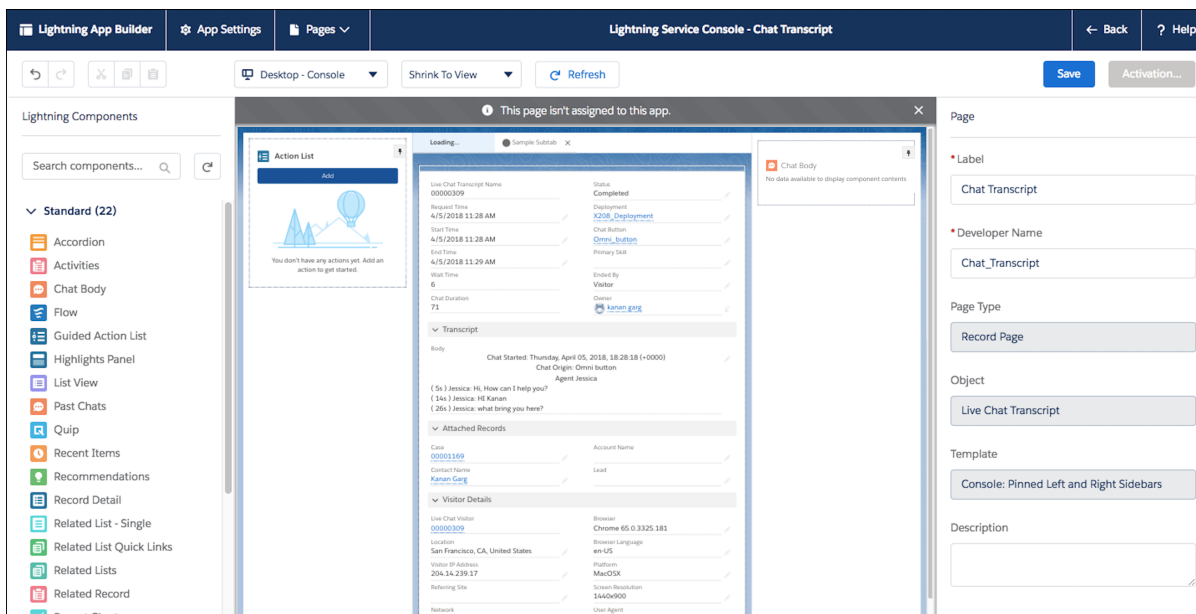
Where: This change applies to Live Agent in Lightning Experience in:

- Performance and Developer editions created after June 14, 2012
- Unlimited edition with Service Cloud
- Enterprise and Unlimited edition for an additional cost

Why: Lightning Guided Engagement helps your agents provide consistent and efficient service for customers that are looking for quick case resolutions. Agents see the appropriate actions to take right up front without having to manually search for them.



How: Use the Cloud Flow Designer to create individual flows. Then use the Process Builder to add processes that associate records with specific flows using the RecordAction junction object. Then head over to the Lightning App Builder, and create a record page for the Live Chat Transcript object using the Console: Left and Right Sidebars page template. Add the Guided Action List component to the left column, and place the Chat Body component in the right column. Use the Guided Action List component channel settings to specify which flows you want agents to complete first and last, and whether to launch the first flow in the list automatically.



SEE ALSO:

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

[Add Pinned Regions to Your Console Sidebars](#)

[Lightning Guided Engagement Developer Guide \(English only\)](#)

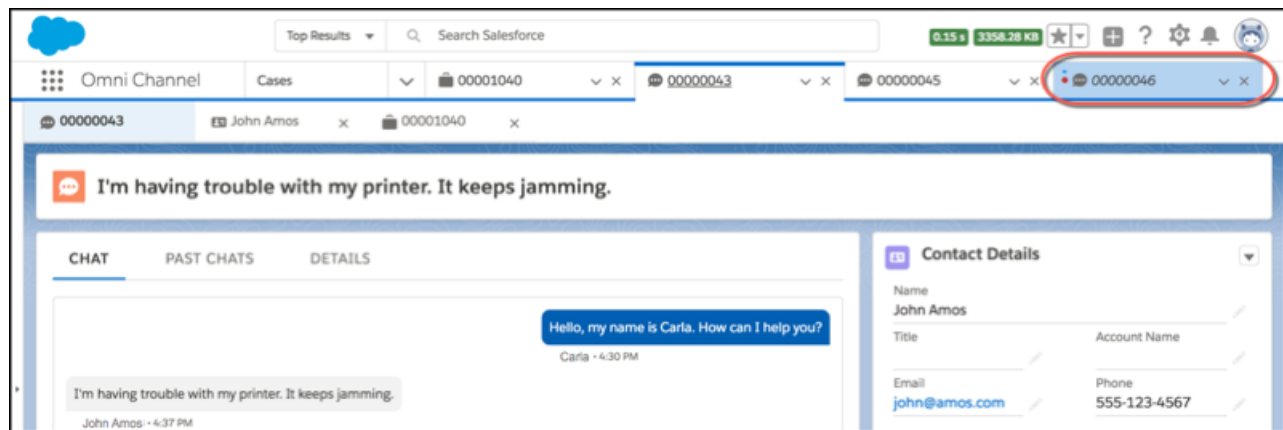
Catch Your Agent's Eye with Incoming Message Notifications in Live Agent

When a customer responds to a chat, in addition to a red dot, the chat tab turns dark blue and blinks three times to notify the agent about the new message. This feature is automatically enabled for agents using Lightning Experience.

Where: This change applies to Lightning Experience in:

- Performance and Developer editions created after June 14, 2012
- Unlimited edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

Why: When the agent types a reply in the chat window, the red dot goes away. If the chat tab is already selected, the tab doesn't show a notification. If a subtab is open within the selected chat tab, the chat subtab blinks. Previously, the only notification to the agent was a red dot in the chat tab.



Preview File Attachments in Live Agent in Lightning Experience

Support agents can preview file attachments sent or received in Live Agent chats in Lightning Experience. Chat file attachments now use the Files object, which is fully supported in Lightning Experience, instead of the Attachments object. The Attachments related list shows a thumbnail image of the file and the file size. Agents can click the file to preview it in the file browser. This feature is automatically enabled in Lightning Experience.

Where: This change applies to Lightning Experience in:

- Performance and Developer editions created after June 14, 2012
- Unlimited edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

SEE ALSO:

[Salesforce Help: Transfer Files During a Chat \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: File Size Limits in Salesforce \(can be outdated or unavailable during release preview\)](#)

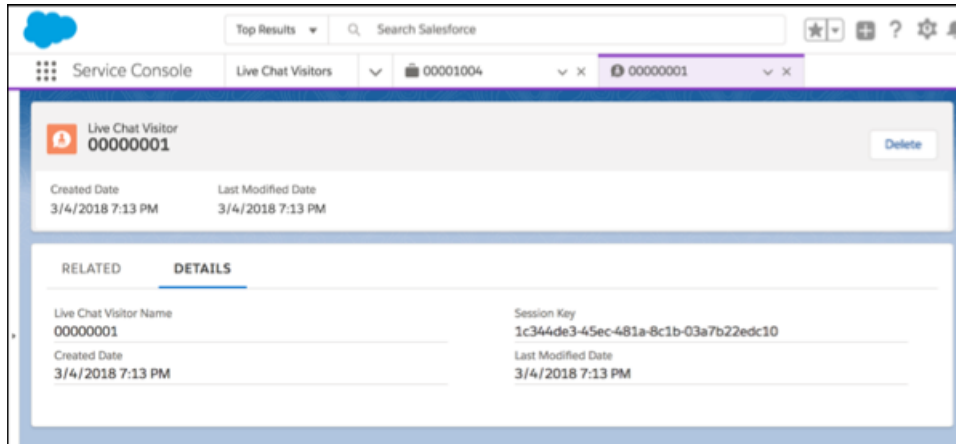
Customize the Live Chat Visitor Page in Lightning Experience

We added a preconfigured Lightning page for the Live Chat Visitor page for Live Agent, so admins who are designing their own Lightning console apps can customize it. Previously, the Live Chat Visitor page wasn't available in Lightning Experience.

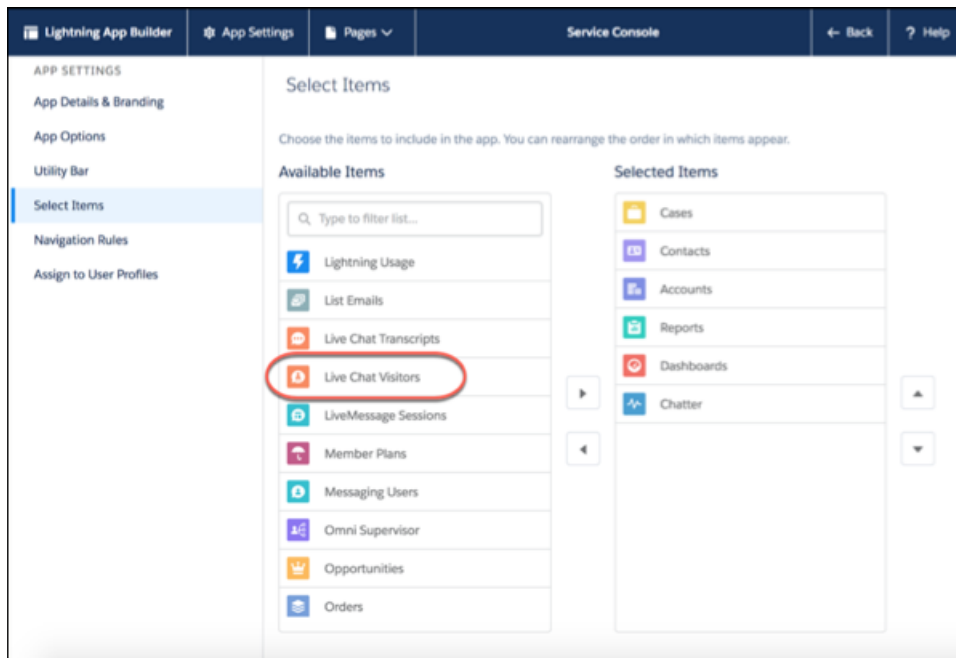
Where: This change applies to Lightning Experience in:

- Performance and Developer editions created after June 14, 2012
- Unlimited edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

Why: The Live Chat Visitors page in Lightning Experience is the same as in Salesforce Classic. It shows the visitor record and related records, such as transcripts, associated with a chat.



How: To add the Live Chat Visitor page to your Lightning Console app, open the Lightning App Builder and navigate to the Select Items page. Add the Live Chat Visitors item to the Selected Items list.



SEE ALSO:

[Salesforce Help: Create and Edit a Custom Lightning Console App \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Live Agent Visitor Records \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Live Agent Transcripts \(can be outdated or unavailable during release preview\)](#)

Set Up Live Agent in Lightning Experience with a Guided Setup Flow

You don't have time to fiddle around in Setup to get started with Live Agent in Lightning Experience—your customers have questions now. The Live Agent guided setup flow configures Omni-Channel routing for chats, creates a basic Live Agent configuration, and set up an out-of-the-box Snap-ins Chat experience. Whether you're a web chat newbie or a Live Agent veteran who's curious about Lightning Experience, the guided setup flow gets you ready to go.

Where: This change applies to Lightning Experience in all editions with the Service Cloud.

How: From any Lightning Experience app, click the gear icon and go to Service Setup. If the Live Agent setup flow tile doesn't appear in Recommended Setup, click **View All** to see the full list. Then select **Live Agent Setup**.

Snap-Ins Chat: Chat Improvements and the Version 5.0 Code Snippet

Use Lightning components to customize the user interface of the minimized chat snap-in. Provide a case form to chat customers when your agents are offline. Upgrade your Snap-ins code snippet to version 5.0 to use appointment management and other new features.

IN THIS SECTION:

[Collect Cases When Your Chat Agents Are Off the Clock](#)

Customers need support day and night, but that doesn't mean you have to offer 24/7 chat support. Instead of leaving your customers hanging when your agents are off duty, let customers log a case for your team. Rather than showing your customers an offline button when your agents aren't available to chat, you can give them a button that opens a case form. After they submit the form, your team can handle the issue when they're back online.

[Customize the Minimized Snap-In with Lightning Components](#)

Take full control of the user interface for the snap-in when it's minimized. The standard snap-in displays a logo and brief messaging and changes color when there's a new message. Now you can customize own how the minimized snap-in looks and acts for various chat events using Lightning components.

[Get Snap-Ins Settings with Lightning Components](#)

Customize your Lightning components for pre-chat and the minimized snap-in based on settings in your Snap-ins deployment. You can get the Live Agent button ID and Live Agent Deployment ID assigned to the deployment, and the agent and chatbot image URLs.

[Set a Routing Order to Fine-Tune How Chats Are Assigned to an Agent](#)

Give your customers a better shot at reaching an agent by providing multiple agent and chat button options for chats to route to. Replace the assigned chat button with a list of user IDs and button IDs. The chat is routed to the first available user or button in the list.

[Display a Customer's Place in Line Before the Chat Starts](#)

Let your customers know how far away they are from the magical phrase: "You're up next!" Display the customer's place in line on the snap-in to let them know where they are in the agent's queue.

[Make Your Own Custom Events for Chats](#)

Load your own JavaScript and CSS files into Snap-ins Chat to handle and style custom chat events. Custom chat events let you have your own communication channel with your Live Agent extension in the console to send and receive chat events.

[Update to the Version 5.0 Code Snippet to Get the Latest Features](#)

Don't miss out on custom chat events, setting a routing order, and the other new Snap-ins features. Add the new code snippet to get the new parameters that you need. In addition, Snap-ins Appointment Management is now in Snap-ins setup options, and the chat branding options have moved into Setup from the code snippet.

[Get a Quick Start to Snap-Ins Chat with the Live Agent Setup Flow](#)

You don't have time to fiddle around in Setup to get started with live web chat—your customers have questions now. The new Live Agent guided setup flow sets up Omni-Channel routing for chats, gives you a basic Live Agent configuration, and hooks you up with the out-of-the-box Snap-ins Chat experience.

[Preview Files Sent During a Chat](#)

File attachments in chats now use the Files object, so you can say goodbye to unnecessary file downloads. Previously, file attachments used the Attachments object, which doesn't support previewing files.

Collect Cases When Your Chat Agents Are Off the Clock

Customers need support day and night, but that doesn't mean you have to offer 24/7 chat support. Instead of leaving your customers hanging when your agents are off duty, let customers log a case for your team. Rather than showing your customers an offline button when your agents aren't available to chat, you can give them a button that opens a case form. After they submit the form, your team can handle the issue when they're back online.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions, using the Snap-ins code snippet version 5.0 and later.

How: Enable Web-to-Case, turn on offline support in Snap-ins setup, and create your case form. Refresh your Snap-ins code snippet and paste it into your website. If you don't refresh and paste the snippet, offline support doesn't work.

Customize the Minimized Snap-In with Lightning Components

Take full control of the user interface for the snap-in when it's minimized. The standard snap-in displays a logo and brief messaging and changes color when there's a new message. Now you can customize own how the minimized snap-in looks and acts for various chat events using Lightning components.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

How: In the developer console, create a Lightning component that implements the new `lightningsnapin:minimizedUI` interface. Then use the aura methods on the new `lightningsnapin:minimizedAPI` component to create your minimized component.

- `registerEventHandler()` — Passes your own handler function that's called on each event.
- `maximize()` — Maximizes the Snap-ins Chat window from your minimized user interface component.

Get Snap-Ins Settings with Lightning Components

Customize your Lightning components for pre-chat and the minimized snap-in based on settings in your Snap-ins deployment. You can get the Live Agent button ID and Live Agent Deployment ID assigned to the deployment, and the agent and chatbot image URLs.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

How: In the developer console, create or edit a Lightning component for Snap-ins Chat pre-chat, or the new Lightning component for the minimized snap-in. Create the `lightningsnapin:settingsAPI` component, and use the `getLiveAgentSettings()` method to grab the Live Agent IDs and image URLs that you want to use.

Set a Routing Order to Fine-Tune How Chats Are Assigned to an Agent

Give your customers a better shot at reaching an agent by providing multiple agent and chat button options for chats to route to. Replace the assigned chat button with a list of user IDs and button IDs. The chat is routed to the first available user or button in the list.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions, using the Snap-ins code snippet version 5.0 and later.

How: Upgrade your code snippet to version 5.0. Use the `embedded_svc.settings.fallbackRouting` parameter to set an array of `buttonId`, `userId`, or `userId_buttonId`.

Display a Customer's Place in Line Before the Chat Starts

Let your customers know how far away they are from the magical phrase: "You're up next!" Display the customer's place in line on the snap-in to let them know where they are in the agent's queue.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions, using the Snap-ins code snippet version 5.0 and later.

How: Make sure the chat button that's assigned to your Snap-ins deployment has the **Enable Queue** setting enabled in your Live Agent settings. In Snap-ins setup, select **Show queue position**.

Make Your Own Custom Events for Chats

Load your own JavaScript and CSS files into Snap-ins Chat to handle and style custom chat events. Custom chat events let you have your own communication channel with your Live Agent extension in the console to send and receive chat events.

Where: This change applies to Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions, using the Snap-ins code snippet version 5.0 and later. Custom events are supported in console apps created in Salesforce Classic only.

How: Upload your files as static resources with the cache control set to public. Give them a name with no spaces that's easy to remember, because you reference them by static resource name in Snap-ins Chat.

Add the resources to your Snap-ins code snippet as an array (or through the Snap-ins Chat component settings if you're using Communities). When you specify the resources, use the static resource name, not the file name. For example, if you upload `CustomEvent.js` and give it the name `CustomEvent`, enter `CustomEvent`.

The external scripts and styles parameters aren't included in the version 5.0 code snippet by default, but you can add them manually.

- `embedded_svc.settings.externalScripts = ["...", "..."]`
- `embedded_svc.settings.externalStyles = ["...", "..."]`

Update to the Version 5.0 Code Snippet to Get the Latest Features

Don't miss out on custom chat events, setting a routing order, and the other new Snap-ins features. Add the new code snippet to get the new parameters that you need. In addition, Snap-ins Appointment Management is now in Snap-ins setup options, and the chat branding options have moved into Setup from the code snippet.

Where: Snap-ins setup is available in Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions.

Why: We moved the chat images from the code snippet into Setup so that you don't have to maintain your image URLs in your codebase. But if you prefer keeping them in the code snippet, you can still use the same parameters that you've been using.

How: When you set up new Snap-ins Chat features, refresh your code snippet to upgrade to version 5.0, then re-paste it into your website.

The following parameters are new or can be added manually with version 5.0:

- `embedded_svc.settings.fallbackRouting = ["...", "..."]`
- `embedded_svc.settings.offlineSupportMinimizedText = "..."`
- `embedded_svc.settings.externalScripts = ["...", "..."]` (add manually)
- `embedded_svc.settings.externalStyles = ["...", "..."]` (add manually)
- `embedded_svc.settings.chatbotAvatarImgURL = "..."` (add manually)

Get a Quick Start to Snap-Ins Chat with the Live Agent Setup Flow

You don't have time to fiddle around in Setup to get started with live web chat—your customers have questions now. The new Live Agent guided setup flow sets up Omni-Channel routing for chats, gives you a basic Live Agent configuration, and hooks you up with the out-of-the-box Snap-ins Chat experience.

Where: This change applies to Lightning Experience in all editions with the Service Cloud.

How: From any Lightning Experience app, click the gear icon and go to Service Setup. If the Live Agent setup flow isn't shown in Recommended Setup, click **View All** to see the full list, then select **Live Agent Setup**.

Preview Files Sent During a Chat

File attachments in chats now use the Files object, so you can say goodbye to unnecessary file downloads. Previously, file attachments used the Attachments object, which doesn't support previewing files.

Where: This change applies to the console in Salesforce Classic and Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Preview File Attachments in Live Agent in Lightning Experience](#)

Snap-Ins for Mobile Apps: Create Better, Faster, Leaner Apps

We reduced the footprint of the Snap-ins SDK because we no longer require the Salesforce Mobile SDK as a dependency. We streamlined the authentication process for authenticated Knowledge and Case Management. We also jazzed up the Live Agent Chat user experience with prettier chat bubbles and an animated typing indicator.

Where: This update applies to the Snap-ins for Mobile Apps SDK for iOS (version 212.0.1) and Android (version 212.0.0).

For details about new features, see the release notes for [iOS](#) and [Android](#). And visit the [Snap-ins for Mobile Apps](#) site for product information.

CTI: Guide Your Call Center Agents with Flows

Guide your call center agents through multi-step processes with Lightning Guided Engagement. Incoming calls can screen-pop to a record page with a list of flows for the call center agent to complete. The first flow can even auto-launch so that your agents know right where to start. Call data, such as a phone number or customer name, can be passed directly into the flow when it's screen-popped.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

Knowledge: Translation Management, Smart Links, and the Lightning Knowledge Migration Tool (Beta)

Lost in translation? Lightning Knowledge speaks your language. Salesforce Classic translation management features, like Submit for Translation and Publish actions, are available in Lightning Knowledge. Other enhancements include side-by-side viewing of translations and master article versions in a Lightning component and updates to the language switcher component. Smart Links are now available to link to other articles in Rich Text fields. The much-anticipated Lightning Knowledge Migration Tool offers a simple solution for moving your knowledge base from Salesforce Classic into the enhanced functionality of Lightning Knowledge.

IN THIS SECTION:

[Submit for Translation in Lightning Experience](#)

Translation actions can now be performed in both Salesforce Classic and Lightning Experience. Agents can choose from a list of available languages to create translation versions of the master language. Agents can assign the translation drafts to other users or queues, set due dates, and send an email notification to the assigned user.

[Compare Translations and Master Articles Side by Side](#)

Look at master articles and do a side-by-side comparison with the translated articles.

[Use Authoring Actions with Translations](#)

Some authoring actions are now available for translation in Lightning Knowledge: edit, assign, publish, and delete. Translation managers can complete the translation management workflow—without switching back to Salesforce Classic to get the job done.

[Insert Smart Links into Rich Text Fields](#)

Add smart links to the rich text fields in your articles. If articles are revised (and they always get revised!), the links don't break. No need to create a new link with every version. Smart links in Lightning knowledge include enhanced search filters and hover text, so you can quickly see what you're looking for.

[Switch Languages on the Fly with the Translation Switcher Component](#)

With the Language Switcher component, you can quickly see available draft and published languages.

[Hover Text on Articles in Lightning Knowledge Search Results](#)

Hover over search results to quickly scan article details for the information you need. You no longer need to open and close every article in your search.

[Add Lightning Knowledge to Service Essentials](#)

Add a powerful and affordable knowledge solution to your tool kit. Write articles and manage your knowledge base with Lightning Knowledge in the Service Essentials edition.

[Move to Lightning Knowledge with the Lightning Knowledge Migration Tool \(Beta\)](#)

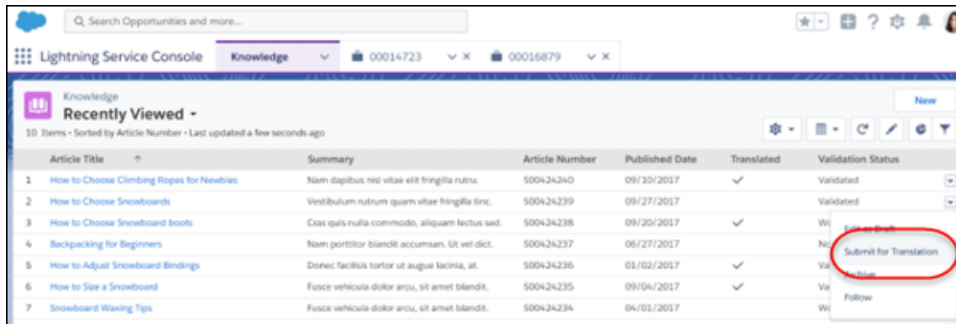
The migration tool takes all the guesswork out of knowledge base data migration. Follow the tool's simple prompts to unify your data under a powerful new Knowledge object.

Submit for Translation in Lightning Experience

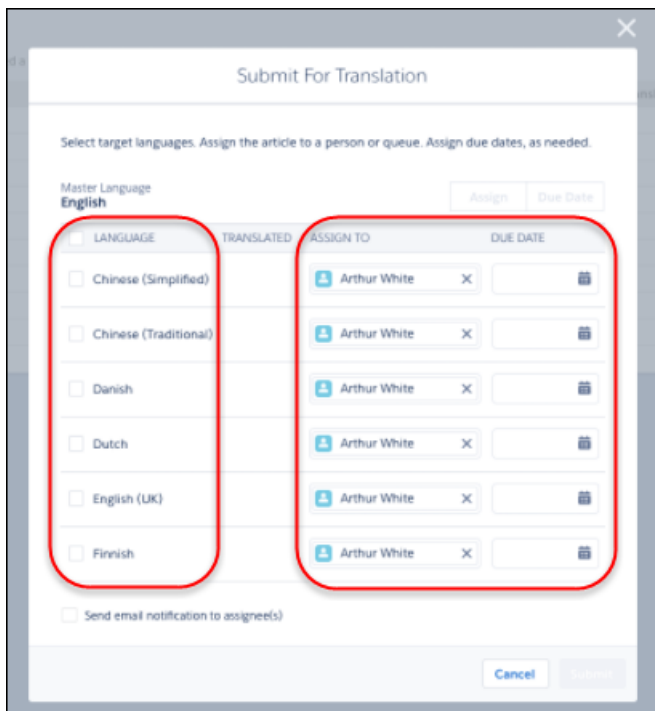
Translation actions can now be performed in both Salesforce Classic and Lightning Experience. Agents can choose from a list of available languages to create translation versions of the master language. Agents can assign the translation drafts to other users or queues, set due dates, and send an email notification to the assigned user.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.

Why: The Submit for Translation button is auto-enabled in the article list view and can be conveniently added to the record home in Lightning Knowledge. Add it to the Page Layouts for the User Profile and Record Type where you want it to displayed.



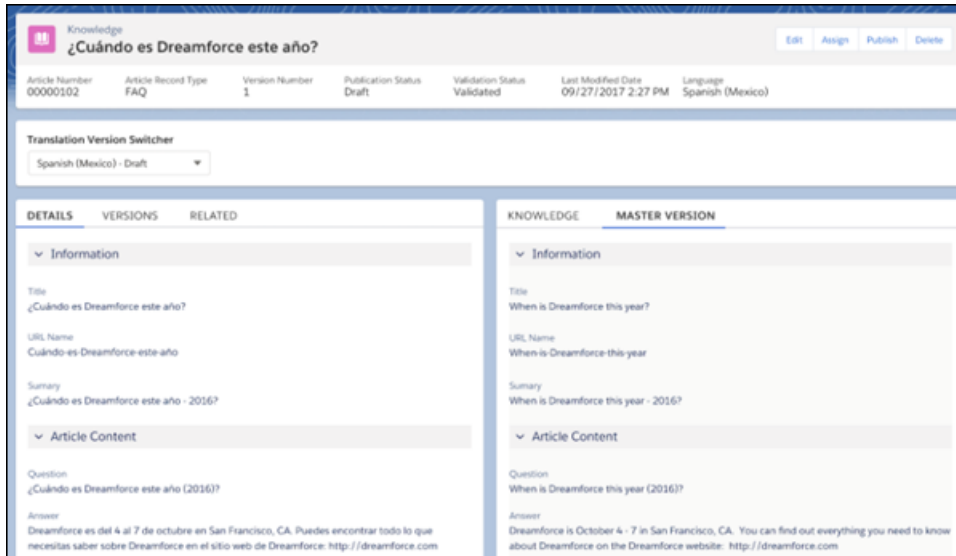
How: After selecting an article for translation, click the Submit for Translation action in the upper right corner of the page. The Submit for Translation menu appears. Users can easily choose from a menu of active languages for translation, assign translations to authors, set due dates, and notify assigned users.



Compare Translations and Master Articles Side by Side

Look at master articles and do a side-by-side comparison with the translated articles.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.



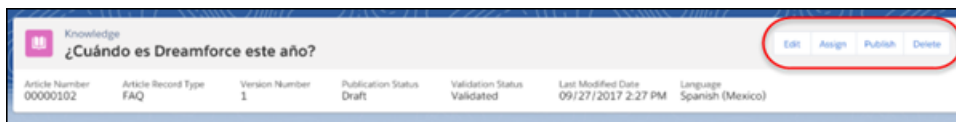
How: Admins add the Master Article Component to the Lightning record page using the Lightning App Builder

Use Authoring Actions with Translations

Some authoring actions are now available for translation in Lightning Knowledge: edit, assign, publish, and delete. Translation managers can complete the translation management workflow—without switching back to Salesforce Classic to get the job done.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.

How: Admins can add authoring and translation management action buttons to the translated article page layout from settings. The authoring and translation management action buttons include: edit, assign, publish, and delete.



Insert Smart Links into Rich Text Fields

Add smart links to the rich text fields in your articles. If articles are revised (and they always get revised!), the links don't break. No need to create a new link with every version. Smart links in Lightning knowledge include enhanced search filters and hover text, so you can quickly see what you're looking for.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.

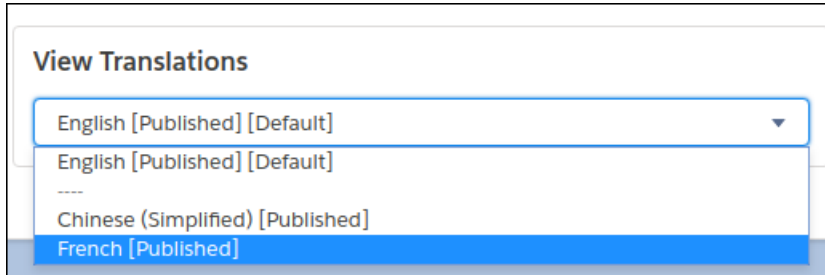
Why: Agents can confidently use smart linked articles with rich text fields, knowing the revisions won't break the links.

Switch Languages on the Fly with the Translation Switcher Component

With the Language Switcher component, you can quickly see available draft and published languages.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.

Why: The Translation Switcher opens a scrollable dropdown that displays all available draft and published article versions in all available languages.



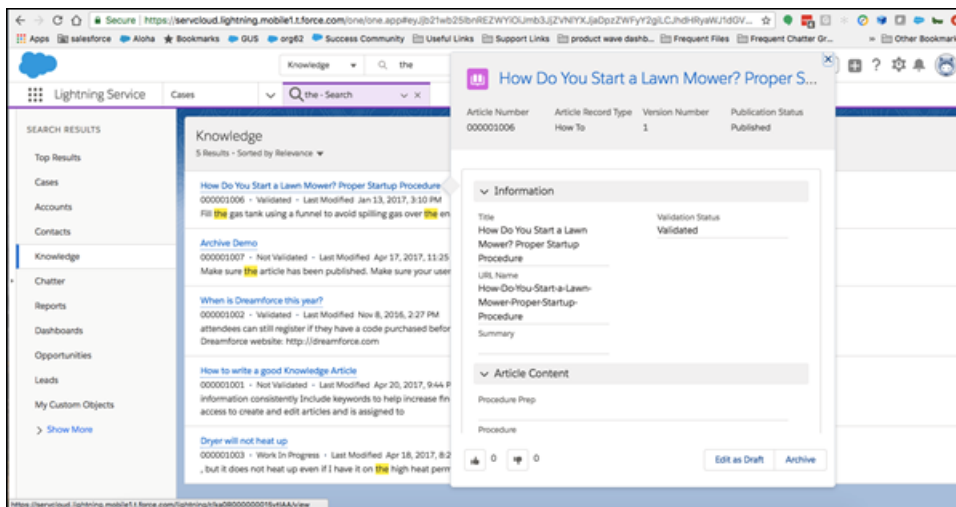
How: If your org already has multiple Knowledge languages enabled, the Translation Switcher is enabled by default.

Hover Text on Articles in Lightning Knowledge Search Results

Hover over search results to quickly scan article details for the information you need. You no longer need to open and close every article in your search.

Where: This change applies to Lightning Knowledge in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud. Salesforce Knowledge is available in Professional, Enterprise, Performance, and Essentials editions as an add-on. For more information, contact your Salesforce representative.

How: This feature is automatically enabled for agents using Lightning Experience.



Add Lightning Knowledge to Service Essentials


Add a powerful and affordable knowledge solution to your tool kit. Write articles and manage your knowledge base with Lightning Knowledge in the Service Essentials edition.

Where: This change applies to Lightning Knowledge in the Essentials edition of Service Cloud.

Who: Service Essentials license holders can use Lightning Knowledge. For more details, contact your Salesforce representative. Classic Knowledge and Lightning Knowledge access is available to admins only. All other users only have access to Lightning Knowledge.

Move to Lightning Knowledge with the Lightning Knowledge Migration Tool (Beta)

The migration tool takes all the guesswork out of knowledge base data migration. Follow the tool's simple prompts to unify your data under a powerful new Knowledge object.

 **Note:** As a beta feature, the Lightning Knowledge Migration Tool is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

Where: This change applies to Lightning Knowledge in Professional, Enterprise, Performance, Unlimited, and Developer editions with Service Cloud.

Who: Users with Admin permissions can run the migration tool. A Salesforce product manager must enable the Lightning Knowledge Migration Tool for you. For details, contact your Salesforce representative.

How: After some initial preparation, follow the prompts and let the migration tool do the heavy lifting. The Knowledge object is optimized for Lightning by using record types instead of article types and files instead of file fields. After you change the data model, you can use either Lightning Experience or Salesforce Classic. After migration, an admin has to manually revise customizations to use the new Knowledge object.

Service Cloud Mobile: Get Case Management on the Go (Generally Available)

All the case management features you love from Service Cloud are coming to your mobile device! Service Cloud Mobile is a lightweight alternative to the Salesforce app, built to help support agents crush customer cases while they're on the go. The app is available for both Android and iOS mobile devices.

Where: This change applies to the new Service Cloud Mobile app and doesn't affect users in Lightning Experience nor Salesforce Classic. The app is available in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

When: Service Cloud Mobile is available for free download the week of June 18, 2018 on both the App Store and Google Play.

 **Tip:** We recommend to customers that have the pilot version of Service Cloud Mobile to uninstall it. Reinstall the current version from the App Store or Google Play rather than trying to update the previous version.

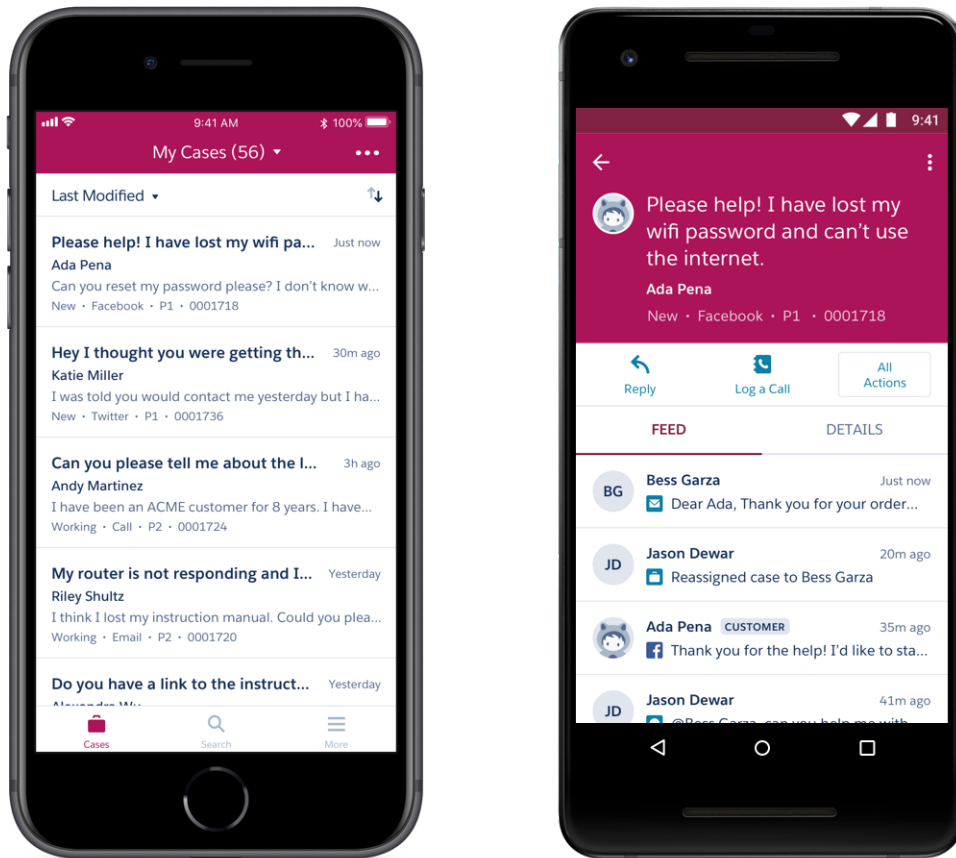
Who: Users with Read access on cases can view cases in the app. To edit or delete a case, users need Update and Delete access on cases. iOS device requirements—iOS 11 and later. Not optimized for iPad.

Android device requirements—Android 5.0 or later, and Google Play Services 11.8.0 or later.

Why: With Service Cloud Mobile, agents can:

- Update, edit, and collaborate on cases
- Manage case lists
- View case in your queues
- Communicate via email, Facebook, and Twitter, and Chatter
- Execute bulk actions
- Search contact and account details
- Manage notification settings to keep a handle on cases and queues

- Send Salesforce feedback about their experience using the app



How: Install the [Service Cloud Mobile managed package](#) in your org to allow users to receive notifications from the app. Then, install the app onto your mobile device and log in.

The app asks users for their Salesforce login and password. After authenticating, your support agents have all their cases right at their fingertips. And they are equipped with all the tools that they need to resolve cases with the speed and efficiency that your customers expect.

Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

IN THIS SECTION:

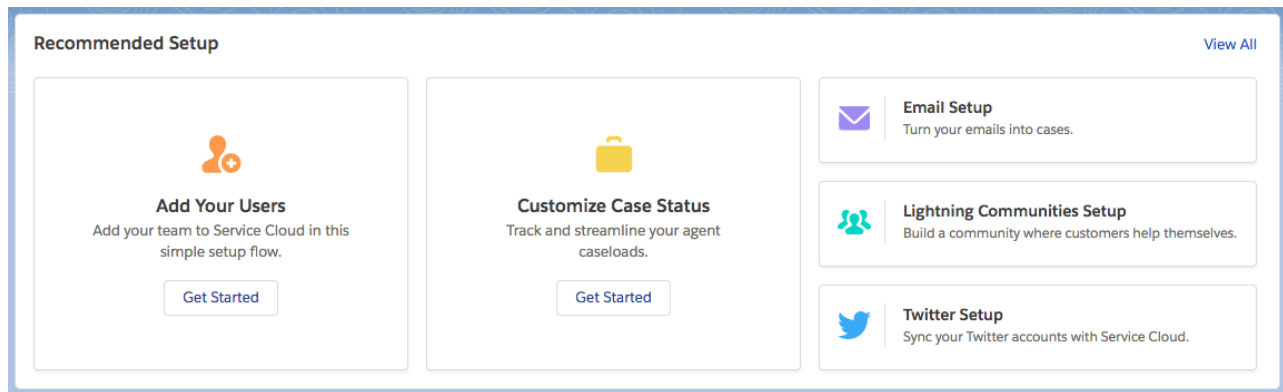
[Service Setup Gets a New Look](#)

The Service Setup page in Lightning Experience has been redesigned to give you dynamic recommendations, an overview of your org's current usage, and dashboards that let you see how your support center's doing. Recommended Setup serves up setup flows, one-step experiences, and resources like videos and Trailhead modules.

Service Setup Gets a New Look

The Service Setup page in Lightning Experience has been redesigned to give you dynamic recommendations, an overview of your org's current usage, and dashboards that let you see how your support center's doing. Recommended Setup serves up setup flows, one-step experiences, and resources like videos and Trailhead modules.

Where: This change applies to Lightning Experience in all editions with the Service Cloud.



Analytics: Reports and Dashboards and Einstein Analytics

On the Reports and Dashboards side, this release brings the Lightning Experience report builder, now generally available, Lightning Experience joined reports (beta), enhanced subscriptions, and much more. For Einstein Analytics, Einstein Discovery recommendations in Salesforce objects is now generally available, conditional formatting in dashboards is here, as well as many other new features.

IN THIS SECTION:

[Reports and Dashboards: Lightning Experience Report Builder \(Generally Available\), Lightning Joined Reports \(Beta\), Subscription Improvements](#)

It's here! The Lightning Experience report builder is now generally available. Start gaining insights from multiple objects with the Lightning Experience joined report beta. Subscribe other people to dashboards. And a whole lot more!

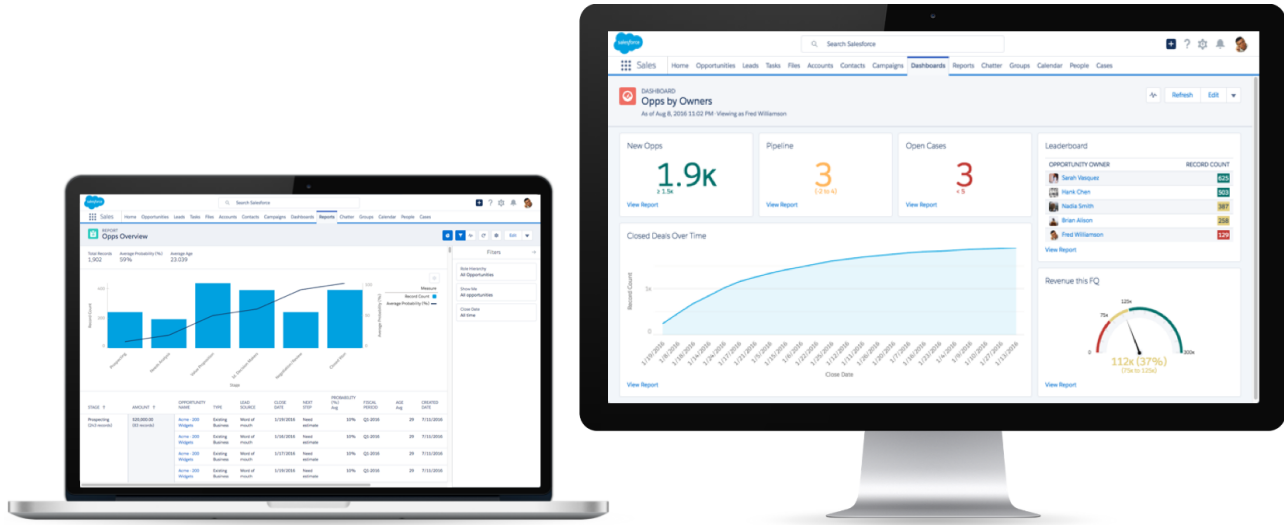
[Einstein Analytics: Einstein Discovery Recommendations, Conditional Formatting, Replication Scheduling, App Templates](#)

Get Einstein Discovery predictions and recommended actions in a Salesforce object of your choice. Automatically update dashboard widget formatting with easily set thresholds. Control when different data is updated by scheduling replication by connection. And create apps to get started fast with new Analytics Templates.

Reports and Dashboards: Lightning Experience Report Builder (Generally Available), Lightning Joined Reports (Beta), Subscription Improvements

It's here! The Lightning Experience report builder is now generally available. Start gaining insights from multiple objects with the Lightning Experience joined report beta. Subscribe other people to dashboards. And a whole lot more!

Watch a demo of this release's top reports and dashboards features: [🎥 Lightning Experience Reports and Dashboards Release Overview \(English Only\)](#)



IN THIS SECTION:

[Reports: Lightning Report Builder \(Generally Available\), Enhanced Run Page \(Beta\), Lightning Joined Reports \(Beta\)](#)

Lightning report builder is now generally available. Improvements to the run page make working with reports even more productive. View joined reports in Lightning Experience by opting into the Lightning Joined Report beta. These changes apply to Lightning Experience only.

[Dashboards: Lightning Tables Get Better, Use Chart Settings from Reports, Add Reports to Dashboards](#)

Group and measure records in Lightning tables. Surface a report chart in a dashboard component. Add reports to dashboards with only one click.

[Folders: Get Organized with Subfolders, Customize the Reports and Dashboards Lists](#)

Organize your reports and dashboards with folders and subfolders. Customize the columns on the Reports or Dashboards pages to see what's of most interest. These changes apply to Lightning Experience only.

[Subscriptions: Expand Dashboard Subscriptions](#)

Add other people as subscribers to your reports and dashboards so you can share the latest information automatically on a set schedule. These changes apply to Lightning Experience only.

Reports: Lightning Report Builder (Generally Available), Enhanced Run Page (Beta), Lightning Joined Reports (Beta)

Lightning report builder is now generally available. Improvements to the run page make working with reports even more productive. View joined reports in Lightning Experience by opting into the Lightning Joined Report beta. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Reimagine Reporting with Lightning Report Builder \(Generally Available\)](#)

Give your users a powerful, intuitive tool for analyzing Salesforce data. The future in reporting has fully arrived with Lightning report builder becoming generally available. You can group, filter, and summarize records to answer business questions like “How much revenue did we generate in the South East last quarter?”; “Which lead source is generating the most closed opportunities?”; and “What is the average age of all open cases?” Lightning Report Builder includes some changes since the last release.

[Joined Reports Arrive in Lightning Experience \(Beta\)](#)

Joined reports are perfect for analyzing Salesforce data across multiple report types (like Opportunities with Products joined to Cases with Assets) or getting multiple, simultaneous views of an object (like Closed Won Opportunities alongside Closed Lost Opportunities).

[Export Reports, Keep the Formatting](#)

Sometimes sharing your reports with others means exporting them to Microsoft® Excel®. When you export your reports, we ensure that the formatting you worked so hard on stays intact. The exported report also includes column summaries and totals.

[Group Reports by Customized Date Granularity](#)

Want to review the status of your customer accounts by fiscal quarter? Perhaps you want to take a closer look at opportunities generated this month. Now you can customize date granularity and group records by calendar or fiscal periods.

[Filter Field History Reports by Old and New Values](#)

Previously, with a field history report, you could track field-level changes with the Old Value and New Value fields, but you could not filter by Old Value and New Value. Get ready to slice and dice your field history reports, because now you can filter on both fields.

[Get Improved Performance with Enhanced Run Page \(Beta\)](#)

Reporting in Lightning Experience keeps getting better. This release, we are launching the enhanced run page (Beta). The enhanced run page gives you an improved user interface. For example, viewing record details is just a toggle away. You'll also notice enhanced performance when you run reports.

[Chart Enhancements for Reports in Lightning Experience](#)

Visualizing business data is understanding business data, so we've improved charts to help you see it better. These changes apply to Lightning Experience only.

[Other Enhancements to Reports in Lightning Experience](#)

In addition to this release's major features, we've made some small-but-notable improvements to reports.

Reimagine Reporting with Lightning Report Builder (Generally Available)


Give your users a powerful, intuitive tool for analyzing Salesforce data. The future in reporting has fully arrived with Lightning report builder becoming generally available. You can group, filter, and summarize records to answer business questions like "How much revenue did we generate in the South East last quarter?"; "Which lead source is generating the most closed opportunities?"; and "What is the average age of all open cases?" Lightning Report Builder includes some changes since the last release.

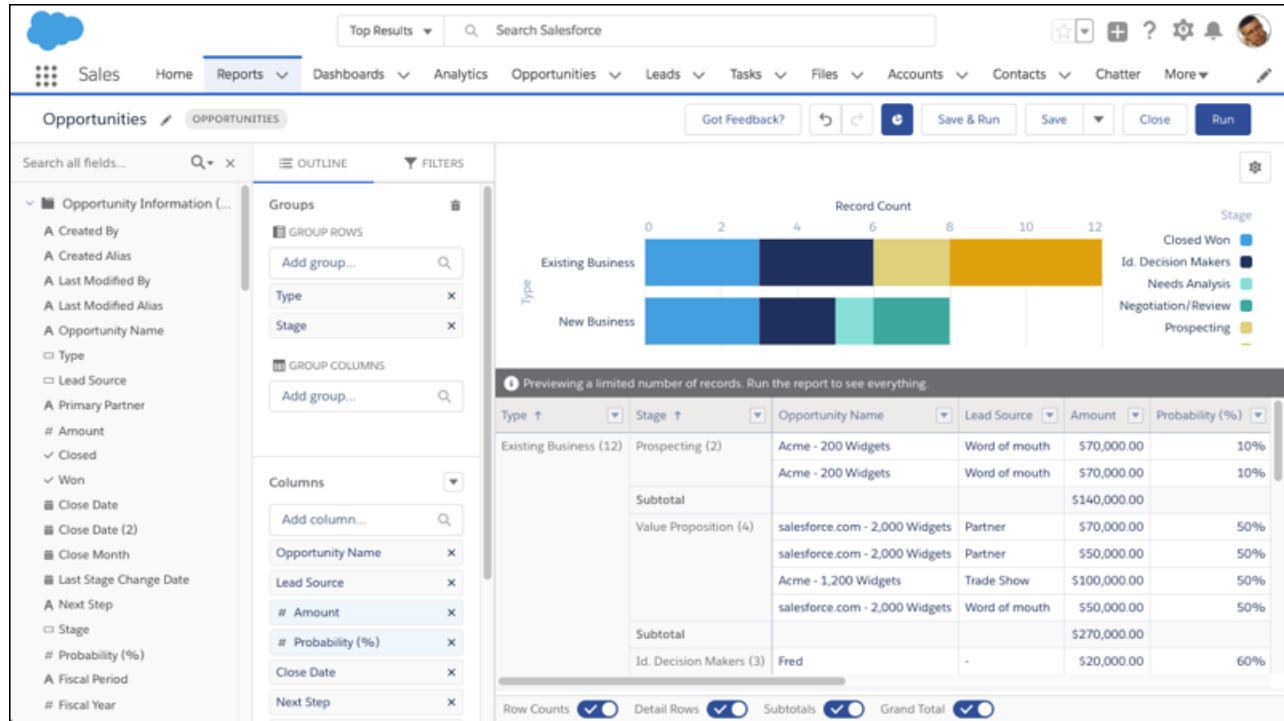
Where: This feature is available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To create, edit, and delete reports in your private folder, you need Create and Customize Reports user permission.
- To create, edit, and delete reports in public folders, you need either the Report Builder or the Report Builder (Lightning Experience) user permission.

How: To build a report in Lightning Report Builder, on the Reports tab, click **New Report**.

 **Note:** Now that Lightning Report Builder is generally available, **Hide the embedded Salesforce Classic report builder in Lightning Experience** replaces the **Enable Lightning Report Builder (Beta)** option on the Reports and Dashboards Settings page. If **Enable Lightning Joined Reports (Beta)** is selected, you can still access the Salesforce Classic report builder in Lightning Experience.



Changes Since Spring '18

- Group reports by customized date granularity.
- Rename reports by clicking the report name or the pencil icon next to the report name.
- See a report's report type inside a gray bubble next to the report name.
- When navigating away from the report builder with unsaved changes, you are prompted to save your changes. No more lost edits!

Joined Reports Arrive in Lightning Experience (Beta)

Joined reports are perfect for analyzing Salesforce data across multiple report types (like Opportunities with Products joined to Cases with Assets) or getting multiple, simultaneous views of an object (like Closed Won Opportunities alongside Closed Lost Opportunities).

Where: This feature is beta in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Note: As a beta feature, Lightning Experience joined reports is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who:

- To view joined reports in Lightning Experience, you need the Run Reports user permission.
- To create or edit joined reports using the Salesforce Classic report builder embedded in Lightning Experience, you need one of these permissions: Create and Customize Reports, Report Builder, or Report Builder (Lightning Experience).

Why: Joined reports are made up of up to 5 blocks. Each block shows data from one standard or custom report type, so a joined report includes data from up to 5 different report types. Report types can only be joined if they share common fields with each other. For

example, Opportunities and Accounts can be joined because they share common fields like Account Name and Account ID. Each block returns up to 2,000 records, which means that a joined report with 5 blocks can return up to 10,000 records. When you group data, you group data across blocks, which means you can only group data by *common fields*. Common fields are fields that each object has. When you filter joined reports, each filter is independently applied to each block. As you can imagine, these attributes make joined reports quite useful!

For example, create the ultimate sales report by building a joined report. Add three blocks to the joined report that give you a complete view of your operation: Accounts, Opportunities, and Cases.

Or, build a joined report to get the birds-eye-view of your customer service operation. Add three blocks and assign each of them the Cases report type. Filter block 1 by *Status equals Open*, block 2 by *Status equals In Progress*, and block 3 by *Status equals Closed*.

How: To start working with joined reports in Lightning Experience, opt your Salesforce org into the beta.

1. From Setup, Enter *Reports* in the *Quick Find* box, then select **Reports and Dashboards Settings**.
2. Select **Enable Lightning Joined Reports (Beta)**.
3. Click **Save**.

Voilà! Joined reports and Lightning Experience together at last.

In Lightning Experience, when viewing a joined report, the filters panel displays filters by block.

Here's a simple joined report that shows Accounts and Opportunities grouped by Account Name.

Accounts and Cases									
Accounts Accounts block 1					Opportunities Opportunities block 2				
Account Name ↓	Account Owner	Type	Last Modified Date	Billing State/Province	Opportunity Name	Amount	Close Date	Stage	Probability
ZiffCorp	Fred Williamson	Customer	4/5/2018	NY	ZiffCorp - Laptops	\$20,000.00	5/6/2018	Proposal/Price Quote	
					ZiffCorp - Printers	\$1,500,000.00	4/13/2018	Closed Won	1
Subtotal	Count: 1				Count: 2	\$1,520,000.00			
XNet	Fred Williamson	Customer	4/5/2018	CA					
	Fred Williamson	Customer	4/5/2018	CA					
Subtotal	Count: 2								
West Airlines	Fred Williamson	-	4/5/2018	AL	West Airlines - 12 AW 5000 Series Printer	\$1,403,325.00	6/17/2018	Needs Analysis	
					West Airlines - 10 AW 5000 Series Printer	\$20,000.00	6/17/2018	Value Proposition	
Subtotal	Count: 1				Count: 2	\$1,423,325.00			
Vandelay Industries	Fred Williamson	Customer	4/5/2018	NJ	Vandelay Industries - 30 Spider 3 Series Laptops	\$725,500.00	6/17/2018	Needs Analysis	
					Vandelay - Printers	\$16,000.00	5/20/2018	Needs Analysis	
					Vandelay - Laptops	\$36,000.00	4/13/2018	Closed Won	1
Subtotal	Count: 1				Count: 3	\$777,500.00			
Universal Technologies	Fred Williamson	Competitor	4/5/2018	Connecticut	Universal Technologies 3 Star 10 Series Desktops	\$117,700.00	5/30/2018	Closed Lost	
Subtotal	Count: 1				Count: 1	\$117,700.00			
Universal Motors	Fred Williamson	Customer	4/5/2018	MI					

Note: As you get ready to work with joined reports in Lightning Experience, take note of these beta limitations. These features aren't available in the beta version of Lightning joined reports, but we're working hard to implement them in a future release.

- Create and edit joined reports in the Lightning report builder. Instead, create and edit joined reports in the Salesforce Classic report builder embedded in Lightning Experience.
- Charts

- Edit filters while viewing (although, you can see them in the Filters panel)
- Subscriptions
- Export
- Open in Quip
- Add to Dashboard
- Chatter feeds
- Save (although Save As is available)
- Sort ascending and descending by column while viewing (though you can see how columns are sorted)
- Trend
- Einstein Data Insights

Export Reports, Keep the Formatting

Sometimes sharing your reports with others means exporting them to Microsoft® Excel®. When you export your reports, we ensure that the formatting you worked so hard on stays intact. The exported report also includes column summaries and totals.


Where: This feature is available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To export your report to Excel:

1. From the **Edit** dropdown menu, click **Export**.
2. Select **Formatted Report** in the Export dialog.
3. To save your report in .xlsx format, click **Export**.

The screenshot shows the Salesforce Lightning Experience Report Builder interface for a report titled "Opportunities this Year". The report table has columns: STAGE, AMOUNT, PROBABILITY (%), AGE, CLOSE DATE, CREATED DATE, NEXT STEP, LEAD SOURCE, and ADVERTISEMENT. The "Export" button in the top right corner is highlighted with a red circle and the number 1. The "Export View" dialog is open, showing two options: "Formatted Report" (highlighted with a red circle and the number 2) and "Details Only". The "Formatted Report" option includes the text: "Export the report as it appears in Salesforce, including the report header, groupings, and filter details." The "Details Only" option includes the text: "Export only the detail rows. Use this to do further calculations or for uploading to other systems." The "Format" dropdown is set to "Excel Format .xlsx". The "Export" button in the dialog is highlighted with a red circle and the number 3.

STAGE	AMOUNT	PROBABILITY (%)	AGE	CLOSE DATE	CREATED DATE	NEXT STEP	LEAD SOURCE	ADVERTISEMENT
Negotiation/Review	\$500,000.00						Advertisement	New Business
Value Proposition	\$50,000.00						Partner	Existing Business
Value Proposition	\$70,000.00						Partner	Existing Business
Negotiation/Review	\$500,000.00						Advertisement	New Business
Value Proposition	\$50,000.00						Partner	Existing Business
Value Proposition	\$100,000.00						Trade Show	Existing Business
Needs Analysis	\$20,000.00						Trade Show	New Business
Value Proposition	\$140,000.00						Trade Show	Existing Business
Needs Analysis	\$70,000.00						Trade Show	New Business

 **Note:** Want just the records in your report? For a version of your report without the formatting, select **Details Only** from the Export dialog.

SEE ALSO:

[Idea Exchange: Report Printable View in Lightning Experience](#)

[Idea Exchange: Export Report with Details in Lightning Experience](#)

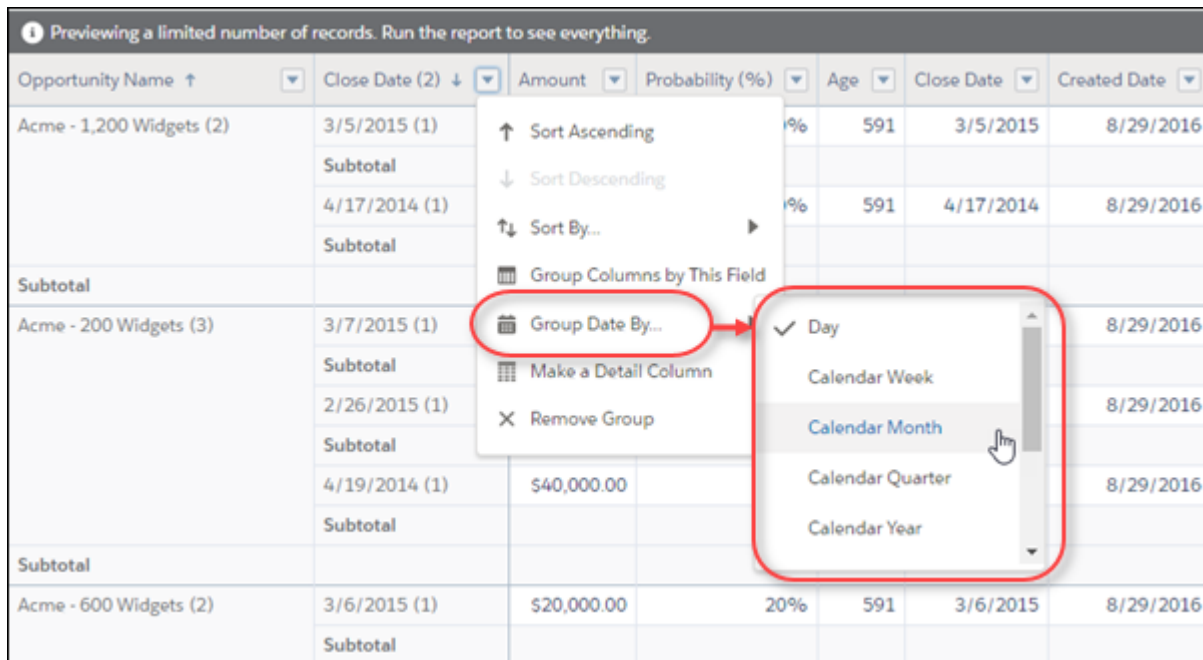
Group Reports by Customized Date Granularity

Want to review the status of your customer accounts by fiscal quarter? Perhaps you want to take a closer look at opportunities generated this month. Now you can customize date granularity and group records by calendar or fiscal periods.

Where: This feature is available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: To customize date granularity in Lightning Experience, you need the Create and Customize Reports user permission.

How: To customize date granularity when grouping records by a date field, select the date column you want to group your report by. Then, for **Group Date By...**, apply a calendar or fiscal period.



The screenshot shows a report preview with columns: Opportunity Name, Close Date (2), Amount, Probability (%), Age, Close Date, and Created Date. A context menu is open over the 'Close Date (2)' column, showing options: Sort Ascending, Sort Descending, Sort By..., Group Columns by This Field, **Group Date By...**, Make a Detail Column, and Remove Group. The 'Group Date By...' option is selected, opening a sub-menu with options: Day (checked), Calendar Week, Calendar Month, Calendar Quarter, and Calendar Year. A red circle highlights the 'Group Date By...' option in the main menu, and a red box highlights the sub-menu options.

Opportunity Name	Close Date (2)	Amount	Probability (%)	Age	Close Date	Created Date
Acme - 1,200 Widgets (2)	3/5/2015 (1)		%	591	3/5/2015	8/29/2016
	Subtotal					
	4/17/2014 (1)		%	591	4/17/2014	8/29/2016
	Subtotal					
Subtotal						
Acme - 200 Widgets (3)	3/7/2015 (1)					8/29/2016
	Subtotal					
	2/26/2015 (1)					8/29/2016
	Subtotal					
	4/19/2014 (1)	\$40,000.00				8/29/2016
	Subtotal					
Subtotal						
Acme - 600 Widgets (2)	3/6/2015 (1)	\$20,000.00	20%	591	3/6/2015	8/29/2016
	Subtotal					

SEE ALSO:

[Idea Exchange: Group Report Data by Date](#)

Filter Field History Reports by Old and New Values

Previously, with a field history report, you could track field-level changes with the Old Value and New Value fields, but you could not filter by Old Value and New Value. Get ready to slice and dice your field history reports, because now you can filter on both fields.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: To add or edit a filter to a field history report, you need one of these permissions: Create and Customize Reports, Report Builder, or Report Builder (Lightning Experience).

Why: Field history reports let you track changes in fields by adding an “Old Value” and a “New Value” column. With a field history report, each report row represents a change to a record. By filtering a field history report, you can answer questions like “Which opportunities have we closed so far this financial quarter?”

All filters on the Old Value and New Value fields are text filters, which sometimes means that special consideration is needed. Even if New Value captures a change to, say, a numeric field - like Amount - it captures the number as text. That means that filter operators like “greater than” and “less than” don’t work like you’d expect. If a field represents a currency - like USD 1,000.50 - and you filter the report to show `New Value equals USD 1,000.50`, then the filter doesn’t always return records for a colleague who works in a different locale. For example, for your colleague in Paris to get the same report results, the filter would probably need to read `New Value equals USD 1 000,50` because number formats vary widely by locale.

How: To see which opportunities closed this financial quarter, create a report based on the report type Opportunity Field History, then add these filters:

- Ensure that the Edit Date standard filter is set to `Current FQ`.
- `New Value contains Closed`
- `Old Value does not contain Closed`

The screenshot shows the Salesforce Report Builder interface for a report titled "Opps Closed in Current FQ" of type "OPPORTUNITY FIELD HISTORY". The report is displayed in a table with columns: Opportunity Owner, Edited By, Field / Event, Old Value, New Value, Edit Date, and Opportunity Name. The table contains 11 rows of data. On the left side, the "Filters" panel is visible, showing two filters: "New Value contains Closed" and "Old Value does not contain Closed", both of which are circled in red. The "Edit Date" filter is set to "Current FQ (Apr 1, 2018 - Jun 30, 2018)".

	Opportunity Owner	Edited By	Field / Event	Old Value	New Value	Edit Date	Opportunity Name
1	Fred Williamson	Fred Williamson	Stage	Negotiation/Review	Closed Won	4/13/2018 3:43 PM	ZiffCorp- Printers
2	Fred Williamson	Fred Williamson	Stage	Negotiation/Review	Closed Won	4/13/2018 3:43 PM	Vandelay - Laptops
3	Fred Williamson	Fred Williamson	Stage	Negotiation/Review	Closed Won	4/13/2018 3:43 PM	Dewey, Cheattem, & Howe - 36 Laptops
4	Fred Williamson	Fred Williamson	Stage	Negotiation/Review	Closed Won	4/13/2018 3:43 PM	AmShip Corporation - free memory upgrade
5	Fred Williamson	Fred Williamson	Forecast Category	Pipeline	Closed	4/13/2018 3:43 PM	Dewey, Cheattem, & Howe - 36 Laptops
6	Fred Williamson	Fred Williamson	Forecast Category	Pipeline	Closed	4/13/2018 3:43 PM	AmShip Corporation - free memory upgrade
7	Fred Williamson	Fred Williamson	Forecast Category	Pipeline	Closed	4/13/2018 3:43 PM	Vandelay - Laptops
8	Fred Williamson	Fred Williamson	Forecast Category	Pipeline	Closed	4/13/2018 3:43 PM	ZiffCorp- Printers
9	Fred Williamson	Fred Williamson	Stage	Negotiation/Review	Closed Won	4/13/2018 2:42 PM	Northtech Communications Inc - 16 AW 500
10	Fred Williamson	Fred Williamson	Forecast Category	Pipeline	Closed	4/13/2018 2:42 PM	Northtech Communications Inc - 16 AW 500
11							

If you don’t see the Opportunity Field History report type, or if your Opportunity Field History report shows no records even though you know that opportunities have changed, then turn on field history tracking. For information about field tracking, including how to set it up, see [Field History Tracking in Salesforce Help](#).

SEE ALSO:

[Field History Tracking](#)

[Idea Exchange: Filter by Old Value and New Value type](#)

Get Improved Performance with Enhanced Run Page (Beta)

Reporting in Lightning Experience keeps getting better. This release, we are launching the enhanced run page (Beta). The enhanced run page gives you an improved user interface. For example, viewing record details is just a toggle away. You'll also notice enhanced performance when you run reports.

Where: This feature is beta in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Note: This release contains a beta version of Enhanced Run page in Lightning Experiences, which means it's a high-quality feature with known limitations. Enhanced Run page 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.

Who: To work with enhanced run page in Lightning Experience, you need the Run Reports user permission.

How: When you hide the embedded Salesforce Classic report builder, you also opt your org into the Enhanced Run page (Beta) in Lightning experience. To start working with Enhanced Run Page in Lightning Experience, click **Switch to Enhanced Run Page (Beta)** in Reports. You can switch back if you need to by clicking **Switch to Legacy Run Page**.

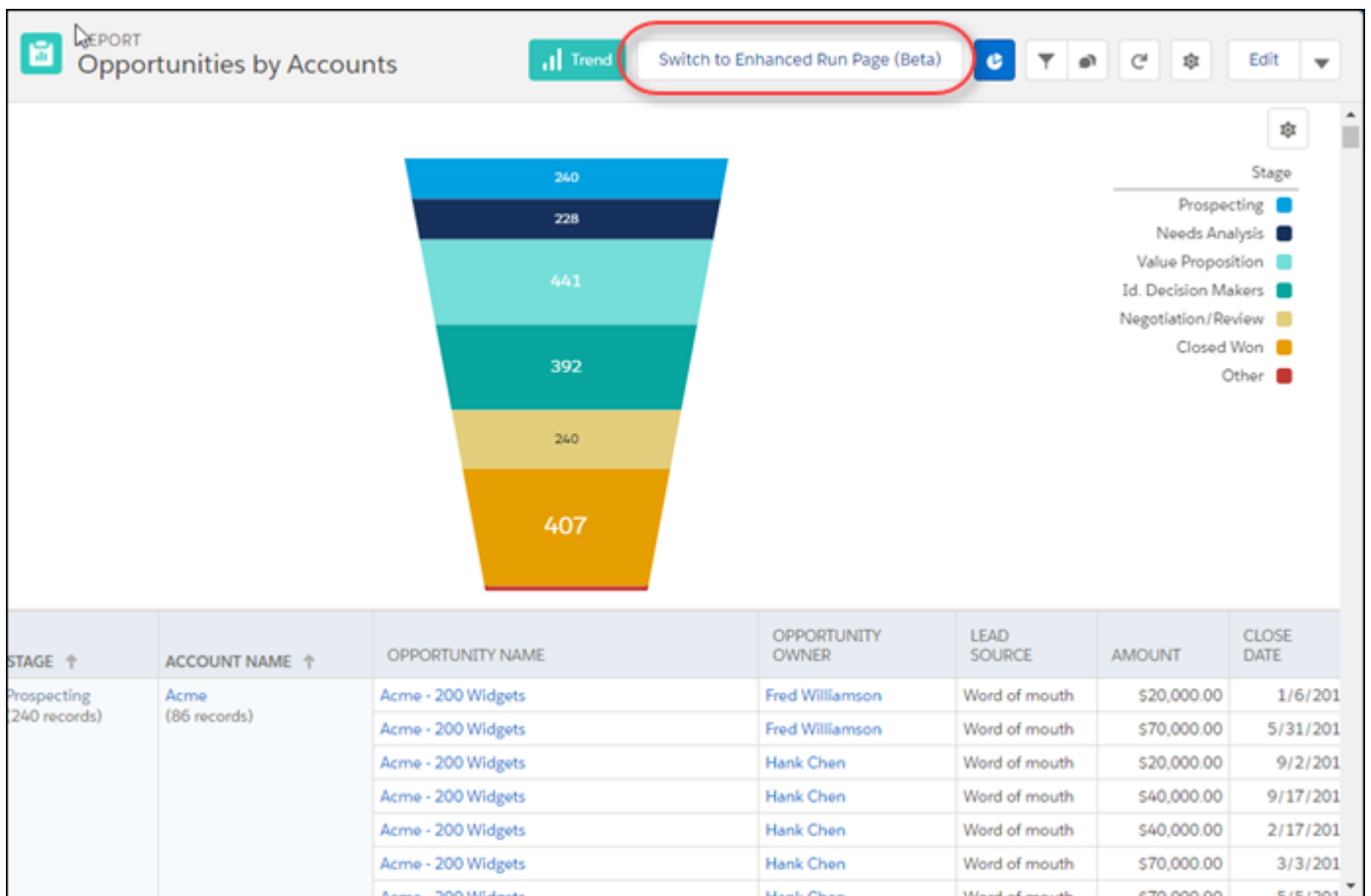


Chart Enhancements for Reports in Lightning Experience

Visualizing business data is understanding business data, so we've improved charts to help you see it better. These changes apply to Lightning Experience only.

Where: These changes are available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Here's why you'll love the chart enhancements to reports.


On the Enhanced Run Page (Beta), Report Charts Reflect All Records in the Report

For increased accuracy, report charts on the Enhanced run page (Beta) now represent all the records, and not just up to the report's limit of 2,000 records.

 **Note:** On the Legacy run page, charts still show up to 2,000 records.

Enhanced Run Page (Beta) and Lightning Report Builder Support the Same Chart Configurations

In Lightning report builder, when you change a chart's grouping from the primary row grouping to a secondary grouping, or to a column grouping, the new grouping is reflected in the Enhanced run page as well.

 **Note:** On the Legacy run page, you can apply only the primary row grouping to charts.

Other Enhancements to Reports in Lightning Experience

In addition to this release's major features, we've made some small-but-notable improvements to reports.

Where: These changes are available in Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Here's why you'll love the other enhancements to reports.

Picklist Fields Accept Null Values

When filtering on a picklist field, to limit results to records that are blank or contain "null" values, select **No Selection** from the picklist and click **Apply**.

Custom Date Ranges Can Be Open-Ended

When applying a filter on a date field, in a date column's Edit Filter box, specify just the **Start Date** to include records after your specified date. Similarly, you can specify just the **End Date** to include records before your specified date.

Date Ranges Accept Manually Entered Values

As an alternative to selecting the dates in a date range, you can type **Start Date** and **End Date** values in a date column's Edit Filter box.

Don't Worry about Losing Unsaved Changes in Your Report

When you navigate away from a report that has unsaved changes, we'll prompt you to save your work.

Dashboards: Lightning Tables Get Better, Use Chart Settings from Reports, Add Reports to Dashboards

Group and measure records in Lightning tables. Surface a report chart in a dashboard component. Add reports to dashboards with only one click.

IN THIS SECTION:

[Link from Dashboard Components to Websites or Salesforce Records](#)

After giving dashboard readers insights about their business, drive them to take the next step by providing one-click access to Salesforce records or websites.

[Add a Report to a Dashboard from the Report](#)

Reading a report? Want to add it to a dashboard, or create a new dashboard? Well, we've got a button for you!

[Use Source Report Charts in Dashboard Components](#)

Got the chart right in the report? Use it in a dashboard component.

[Group and Measure Data in Lightning Tables](#)

Lightning tables, the best way to display record-level details in dashboards, now support grouping and measure columns.

[Chart Enhancements for Dashboards in Lightning Experience](#)

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Link from Dashboard Components to Websites or Salesforce Records

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Where: This feature is generally available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

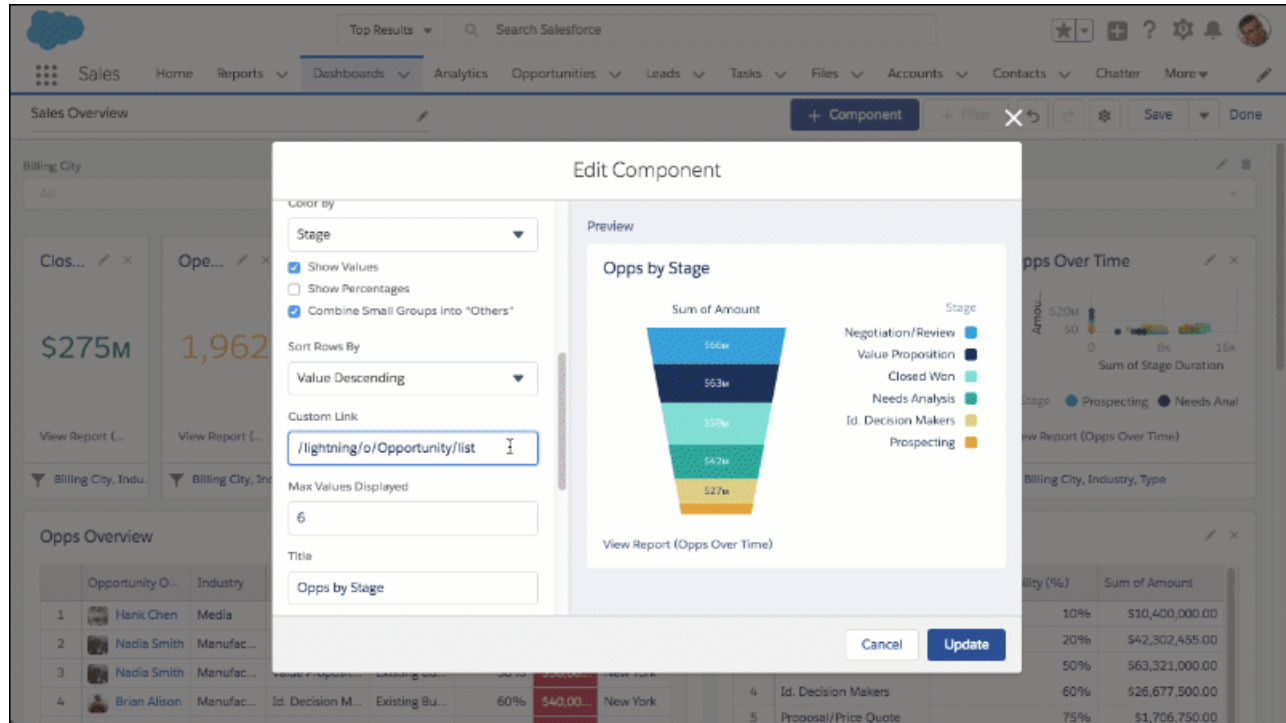
Who:

- To link from dashboard components, you need the Create and Customize Dashboards user permission.
- To link from dashboard components in dynamic dashboards, you need the Manage Dynamic Dashboards user permission.

Why: A sales overview dashboard is a great way for teams to collaborate on opportunities because it provides a complete picture of your pipeline. Dashboard components already link to source reports, so you can get more details, but what if you're ready to take action? Now you can link directly to the Opportunities tab so dashboard readers can get to work!

How: To link from a dashboard component to the Opportunities tab, add or edit a dashboard component. Then, in Custom Link, enter `/lightning/o/Opportunity/list`.

After dashboard viewers expand your linked component, they can visit the link by clicking .



When linking to a website, enter the site's domain. For example, <https://www.salesforce.com/>. Be sure to include <https://> or <http://> or www. If you don't, Salesforce won't recognize the destination as a website. Enter [salesforce.com](https://www.salesforce.com/) (without <https://> or <http://>) and you'll direct people to <https://www.salesforce.com/salesforce.com>.

Add a Report to a Dashboard from the Report

Reading a report? Want to add it to a dashboard, or create a new dashboard? Well, we've got a button for you!

Where: This feature is available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

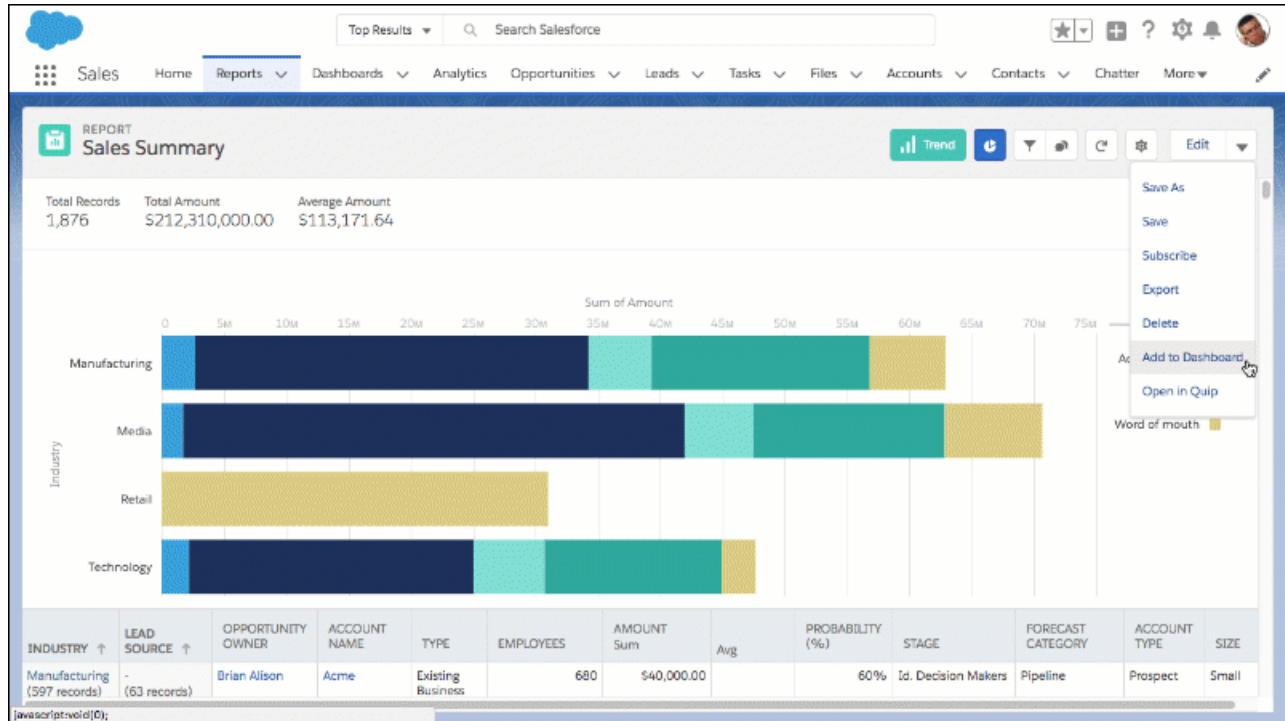
- To add a report to a dashboard, you need the Create and Customize Dashboards user permission.
- To add a report to a dynamic dashboard, you need the Manage Dynamic Dashboards user permission.

Why: Previously, there was only one way to add reports to dashboards. First you edit or create a dashboard. Then you add a component. Finally you find and select your desired source report.

That was—and is—a fine way to add reports to dashboards, but it's a one-way road: you could only add a report to a dashboard **from the dashboard**.

Now there's another way. You can add a report to a new or existing dashboard **from the report**.

How: From either the Reports home page or while reading a report, click > **Add to Dashboard**. Choose the dashboard you want to add the report to, or create a new one, and finish editing the dashboard component.



Use Source Report Charts in Dashboard Components

Got the chart right in the report? Use it in a dashboard component.

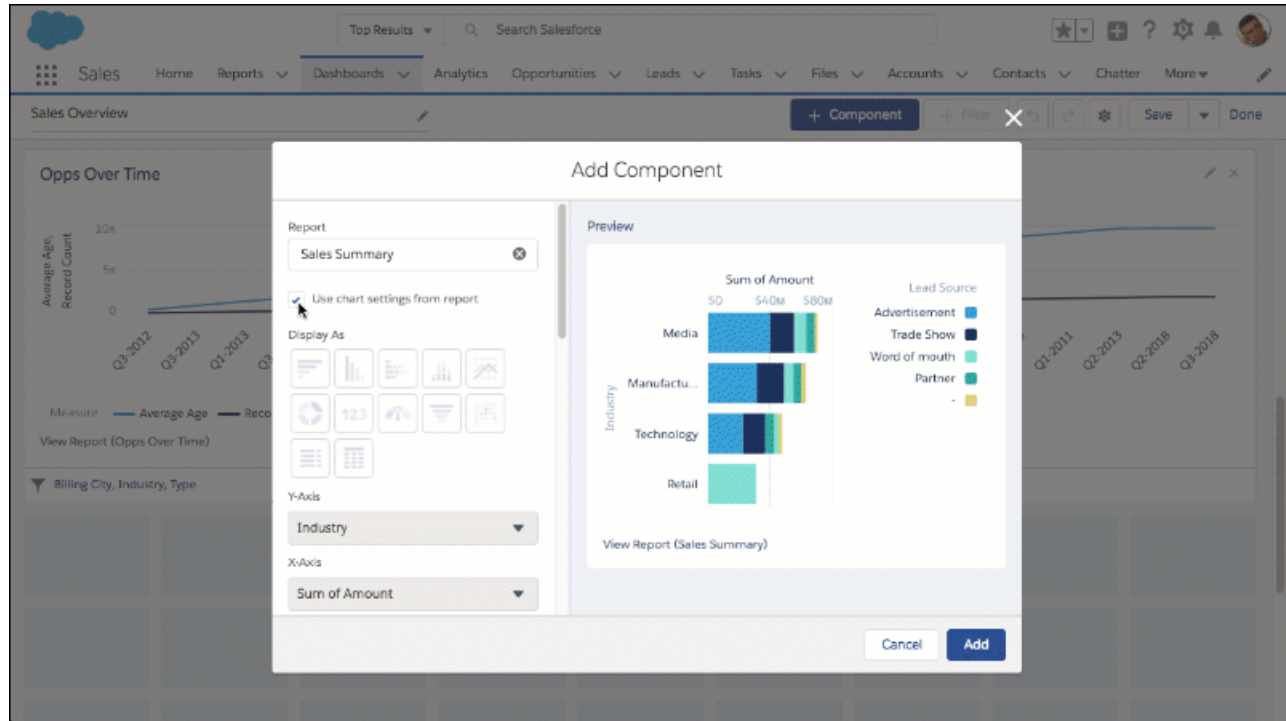
Where: This feature is available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To use a report chart in a dashboard component, you need the Create and Customize Dashboards user permission.
- To use a report chart in a dynamic dashboard component, you need the Manage Dynamic Dashboards user permission.

Why: You've already charted data just the way you like in a report. Instead of recreating the chart from scratch, surface it in a dashboard component.

How: Add or edit a dashboard component, and then select **Use chart settings from report**.



Group and Measure Data in Lightning Tables

Lightning tables, the best way to display record-level details in dashboards, now support grouping and measure columns.

Where: This feature is generally available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To group data in Lightning table dashboard components, you need the Create and Customize Dashboards user permission.
- To group data in Lightning table dashboard components in dynamic dashboards, you need the Manage Dynamic Dashboards user permission.

Why: Now that you can group records in Lightning tables, they're even more useful!

Ungrouped Lightning tables display detail columns. Detail columns show per-record information about each individual record.

Grouped Lightning tables display measure columns. Only numbers can be measured, so all measure columns are numeric.

For example, in this Sales Overview dashboard, you can use a Lightning table to list details about individual opportunity records. A second Lightning table is grouped by stage and provides a handy reference of key metrics, like sum of amount and average probability by stage.

The screenshot shows a Salesforce dashboard titled "Sales Overview" with filters for Billing City, Industry, and Type. It contains two tables:

	Opportunity Owner ↑	Industry	Stage	Probability (%)	Amount
1	Brian Alison	Manufacturing	Id. Decision Makers	60%	\$40,000.00
2	Brian Alison	Technology	Closed Won	100%	\$140,000.00
3	Brian Alison	Technology	Closed Won	100%	\$70,000.00
4	Brian Alison	Manufacturing	Id. Decision Makers	60%	\$20,000.00
5	Brian Alison	Manufacturing	Closed Won	100%	\$100,000.00
6	Brian Alison	Manufacturing	Closed Won	100%	\$20,000.00
7	Brian Alison	Technology	Id. Decision Makers	60%	\$70,000.00
8	Brian Alison	Technology	Value Proposition	50%	\$500,000.00
9	Brian Alison	Detail	Nearby Anaheim	70%	\$50,000.00

	Stage ↑	Average Probability (%)	Sum of Amount
1	Prospecting	10%	\$10,400,000.00
2	Needs Analysis	20%	\$42,302,455.00
3	Value Proposition	50%	\$63,321,000.00
4	Id. Decision Makers	60%	\$26,677,500.00
5	Proposal/Price Quote	75%	\$1,706,750.00
6	Negotiation/Review	90%	\$66,331,000.00
7	Closed Won	100%	\$59,376,500.00
8	Closed Lost	0%	\$4,422,900.00

How: Add or edit a Lightning table. From **Add group...**, select a field to group by. The default measure column is record count. You can't remove record count, but after adding another measure column, you can hide it by clicking the eye icon (👁). To add a different measure column, choose a field from **Add measure column...**. Remember, you can only measure numeric fields, so date, text, picklist, and Boolean fields aren't available. After adding a measure column, click it to choose up to four measures: **Sum**, **Average**, **Max**, or **Min**.

Chart Enhancements for Dashboards in Lightning Experience

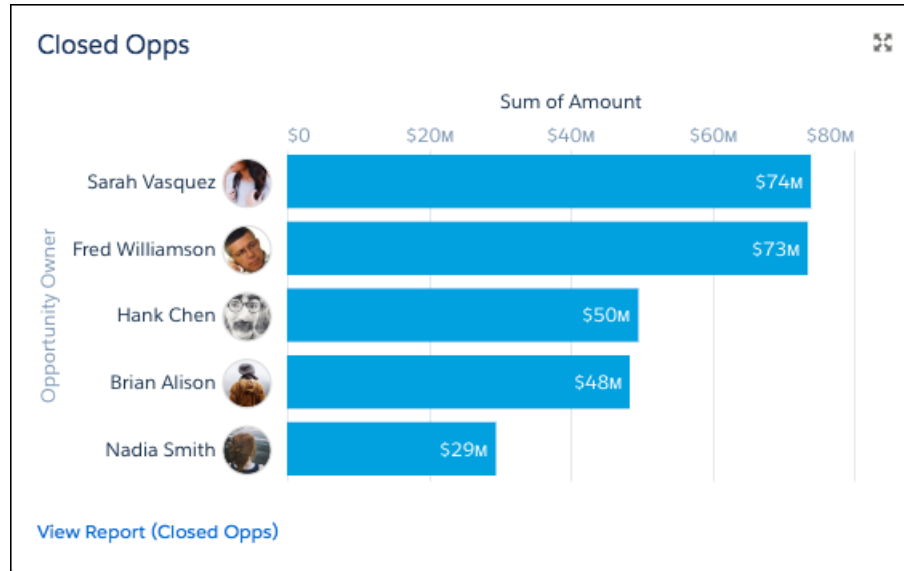
Visualizing business data is understanding business data, so we've improved dashboard charts to help you see it better. These changes apply to Lightning Experience only.

Where: These changes are available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Why: Here's why you'll love the chart enhancements to dashboards.

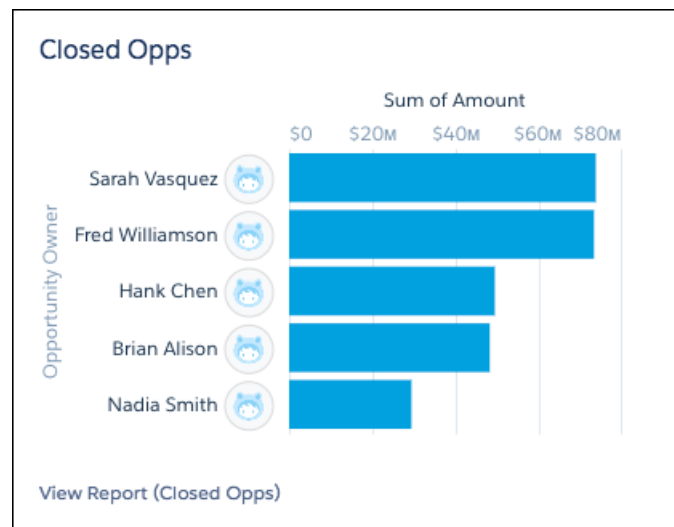
Show Chatter Photos on Horizontal Bar Charts

Horizontal bar charts are another excellent way to visualize leaderboards. Now, add a touch of personality to them by showing Chatter photos!



See Astro in Dashboard Table Components

In the Add Component preview pane, when configuring a component to show Chatter photos, you now see Astro as a placeholder for peoples' Chatter photos. Once you save and refresh the dashboard, you'll see everyone's Chatter photos.

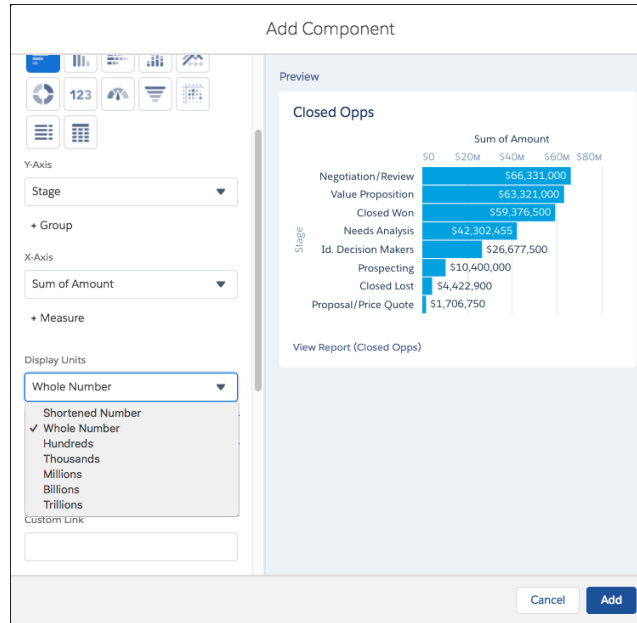


Set Display Units in Dashboard Charts

Choose how to display values in dashboard charts by setting the **Display Units**. Shortened Number automatically chooses a unit appropriate for your data and abbreviates it. Whole number displays the actual values. Other options are Hundreds, Thousands, Millions, Billions, and Trillions. Choose what makes most sense for your data.

Lightning tables, the dashboard component, don't support setting custom display units.

Report charts don't support setting custom display units.



Show Values on Line Charts

See the values of peaks and valleys on line charts without hovering. Just select **Show Values**.

Showing values is not supported on multiple line charts.

Multiple Line Charts in Dashboards Are Easier to Read

In dashboards, on line charts with two or more lines, the space beneath lines is no longer filled with color. Line charts with only one line still color-in area beneath the line.

In reports, multiple line charts always color-in the area beneath lines.

Axis Titles Wrap

In dashboard components, but not in report charts, axis titles now wrap onto a second line before truncating.

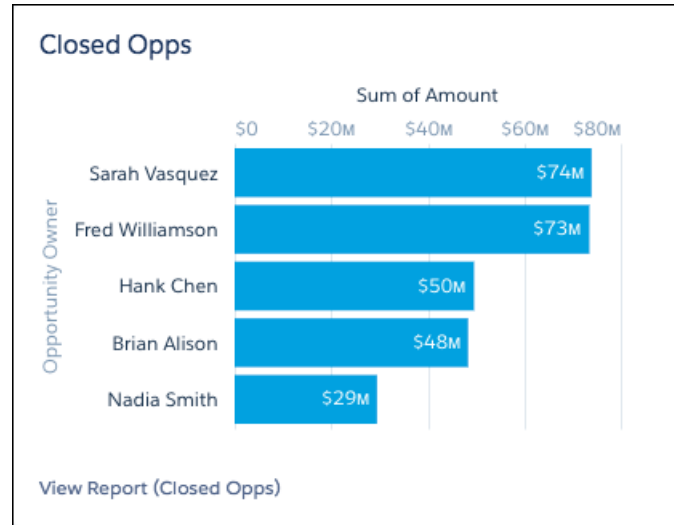
Dashboard Table Components Look Like the Report Run Page

For consistency between reading data in reports and dashboard tables, we've made dashboard tables better resemble reports.

See Currency Symbols like \$, ¥, and € in Charts and Tables

Is that \$100 or ¥100? When values are measured in currencies like dollars, yen, or euros, chart values now display a currency symbol.

Report charts do not display currency symbols.



Bar Charts Now Respect Sort Order in Second-Level Groups

Previously, bar charts respected sort order in first-level groups, but not second. Now, sort order is respected in both groups.

SEE ALSO:

[Idea Exchange: Display Currency in Dashboard Tables](#)

[Idea Exchange: Display Whole Units in Lightning Experience Dashboards](#)

[Idea Exchange: Show Values in Line Charts in Lightning Experience](#)

Other Enhancements to Dashboards in Lightning Experience

In addition to this release's major features, we've made some small-but-notable improvements to dashboards. These changes apply to Lightning Experience only.

Where: These changes are available in Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Here's why you'll love the other enhancements to dashboards.

Better Error Messages for "Unsupported Report Type"

Previously, if you selected an incompatible source report for a dashboard component you saw an error message that simply read "Unsupported Report Type." Now, a more helpful error message appears that tells you why the selected source report is incompatible. For example, if you select a joined report, you now see an error telling you that joined reports aren't supported: "Joined reports can't be used as source reports."

Refresh Dashboards After 7 Days to See Data in Lightning Dashboard Tables

If a dashboard hasn't been refreshed for 7 days, then Lightning dashboard tables display no data. Instead, they prompt dashboard viewers to refresh the dashboard. After refreshing the dashboard the Lightning dashboard table shows data as normal.

Folders: Get Organized with Subfolders, Customize the Reports and Dashboards Lists

Organize your reports and dashboards with folders and subfolders. Customize the columns on the Reports or Dashboards pages to see what's of most interest. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Enhance your Report and Dashboard View in Lightning Experience](#)

The Enhanced List View for reports and dashboards helps you zero in on the information that's most useful to you. On the Reports and Dashboards tabs, you can now decide what columns to show, sort or resize columns, and decide how the text in the columns will appear. We've also added some new default columns that you've asked for, like Report Last Run Date.

[Organizing your Report and Dashboard Folders in Lightning Experience](#)

Life can be complicated, but organizing your content just got easier. With subfolders, you can quickly create a logical structure for your report and dashboard folders. The organization can be by region, role, or function, or whatever makes most sense to you. Moving content between folders is also easier.

Enhance your Report and Dashboard View in Lightning Experience

The Enhanced List View for reports and dashboards helps you zero in on the information that's most useful to you. On the Reports and Dashboards tabs, you can now decide what columns to show, sort or resize columns, and decide how the text in the columns will appear. We've also added some new default columns that you've asked for, like Report Last Run Date.

Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who: All users can customize their report and dashboard lists.

Why: It's helpful to see the information you want at a glance. For example, you might have lots of reports that you've accumulated over the years and not even know which ones are useful anymore. Now it's a simple click to sort on Report Last Run Date. You'll instantly find out which reports have been run mostly recently and which ones are sitting there gathering dust. Other column operations, like resizing and deciding which columns to display, help you tune the Enhanced List View even more.

How: Try any of these actions on the Reports or Dashboards tab.

Sort on a Selected Column. Move your cursor to a column header to see the current sort order. An up arrow indicates A to Z or lowest to highest ordering; a down arrow indicates the reverse. To change the sort order for a column, click the column header.

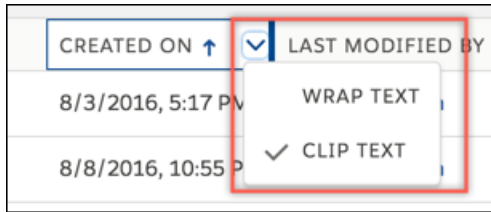
NAME	CREATED BY	CREATED ON ↑	▼
BW Dashb...	Fred Williamson	7/15/2017, 9:54 AM	
BW Dashb...	Fred Williamson	7/14/2017, 11:41 AM	

Resize Columns. To resize a column, move your cursor to the column divider and drag the divider to the left or right.

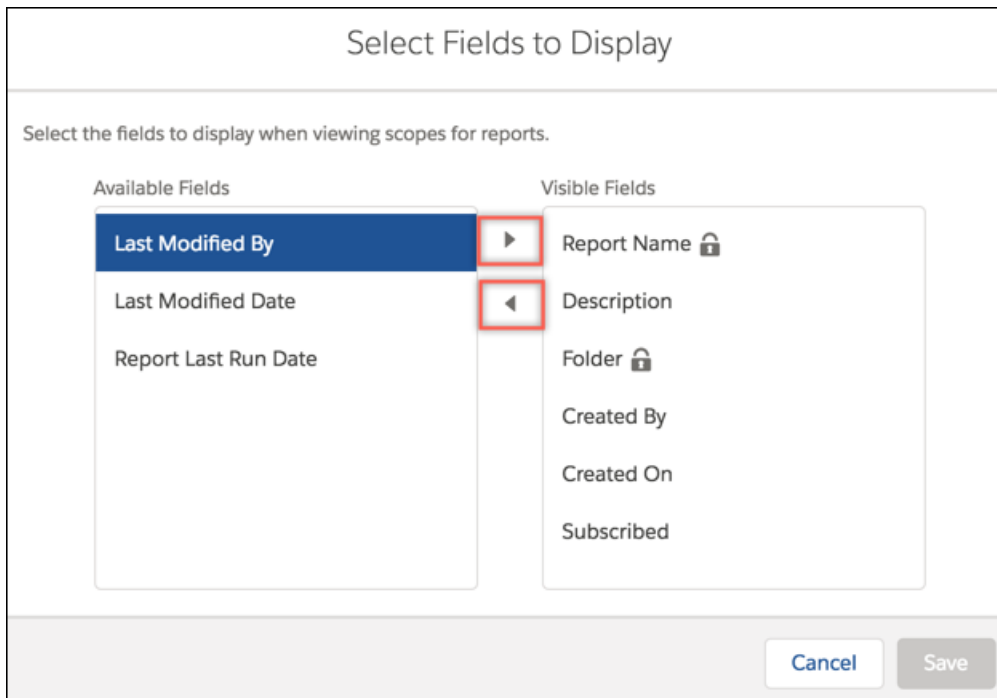
NAME	CREATED BY	CREATED ON
BW Dashboard Charts only	Fred Williamson	7/15/2017, 9:54 AM
BW Dashboard Snapshot	Fred Williamson	7/14/2017, 11:41 AM

Wrap or Clip Column Text. Some columns have an option to choose how content is displayed if it extends beyond the column width. Click the down facing arrow in the column header and select one of the following options:

- **WRAP TEXT.** Continue text on additional lines as needed so all content is shown.
- **CLIP TEXT.** Display only the content that fits in the column.



Select Columns to Display. Click the gear icon and choose **Select Columns**. Use the arrows to select at least 3 columns to display, then click **Save** to save the changes and redisplay the Reports or Dashboards list.



SEE ALSO:

[Idea Exchange: Add Last Run Date to Reports Tab and Dashboards Tab](#)

Organizing your Report and Dashboard Folders in Lightning Experience

Life can be complicated, but organizing your content just got easier. With subfolders, you can quickly create a logical structure for your report and dashboard folders. The organization can be by region, role, or function, or whatever makes most sense to you. Moving content between folders is also easier.

Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who:

- To create report folders and subfolders, you need the **Create Report Folders** user permission.
- To create dashboard folders and subfolders, you need the **Create Dashboard Folders** user permission.
- To rename and delete folders or subfolders, you need **Manage** access to the folder.
- To share folders with other users, you need **Manage** access. You share only the root folder. Subfolders inherit sharing properties from the root folder.

Everyone can move reports and dashboards, but you can move them only to the folders and subfolders where you have write or edit access.

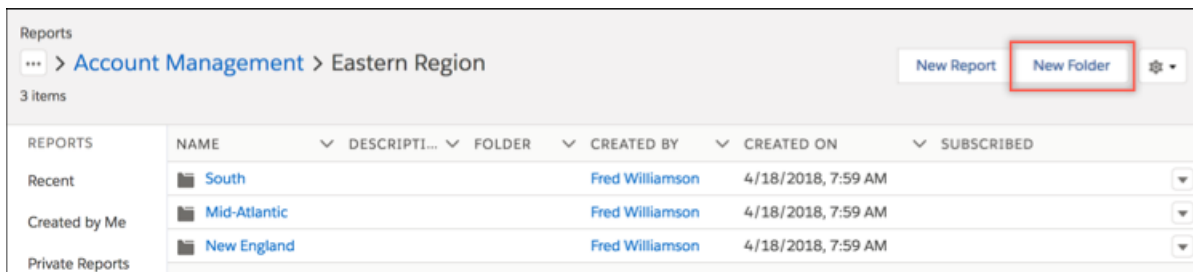
Why: When you're organizing reports and dashboards in folders, subfolders make life easier for everyone. Suppose you're responsible for creating reports for your customer service organization. You already have a Sales Reports folder that you're sharing with Sales, so the sales reps can see what issues have come up. But the reps in each region only want to see the reports from customers in their own region. All you have to do is create a subfolder for each region in the sales folder, and viola!, the reps in each region get to see only what they're interested in.

And there's more. It's now a breeze to move reports and dashboards between folders. You don't have to open the report or dashboard anymore just to change what folder or subfolder it's in. Just select the **Move** row-level action for the report or dashboard.

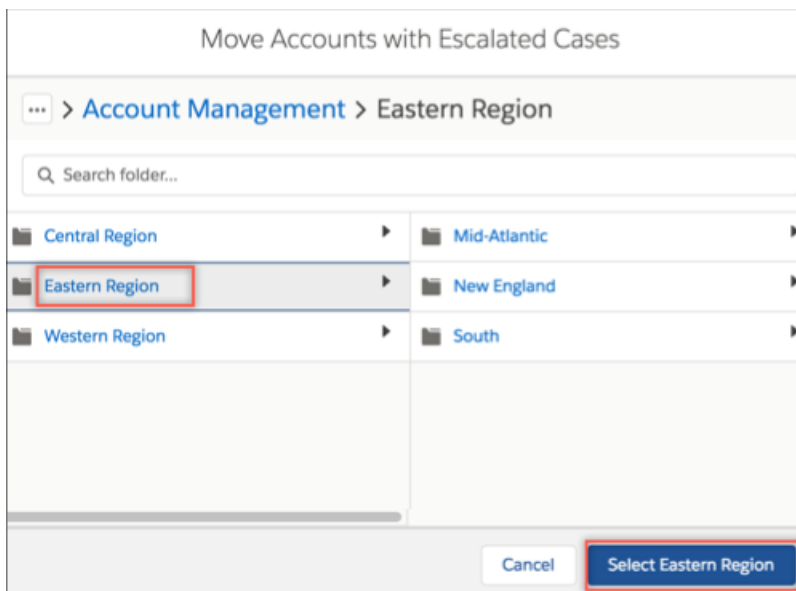
How: Keep these points in mind when you're working with folders and subfolders:

- Enhanced folder sharing must be enabled to use report and dashboard folders and subfolders.
- Subfolders can be created only in user created folders. You can't create a subfolder in your Private folder or the Public folder.
- Folder sharing is only at the root level. If you want to share a subfolder, you must share its root folder.
- Everyone can see who has access to a subfolder, but if you want to change sharing settings you must do that at the root level.

Creating a subfolder is just like creating a folder. Go into the report or dashboard folder where you want to create the subfolder, and click **New Folder**. Name the folder, and click **Save**.



What if you have a report or dashboard in one folder, but want it to be in another? On the Reports or Dashboards page, select **Move** from the row level action menu. A select folder dialog box opens where you can navigate to the destination folder and save.



Finally, you can also rename and delete subfolders.

Keep these rules in mind when deleting report and dashboard folders and subfolders:

- You can delete an empty leaf folder or empty folder tree in Lightning Experience. An empty leaf folder is a folder that doesn't contain any reports or dashboards and doesn't have any subfolders. An empty folder tree is one with no reports or dashboards in the root folder or in any of the subfolders.
- If you want to delete a non-empty folder, either move the reports or dashboards in the folder to another folder, or delete the reports or dashboards, switch to Salesforce Classic, and remove the deleted reports and dashboards from the recycle bin. (Lightning Experience doesn't currently have a recycle bin.)

SEE ALSO:

[Idea Exchange: Nesting Report and Dashboard Folders](#)

Subscriptions: Expand Dashboard Subscriptions

Add other people as subscribers to your reports and dashboards so you can share the latest information automatically on a set schedule. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Add Dashboard Subscriptions for Others in Lightning Experience](#)

Time for the Monday 8:00 AM sales meeting and your sales pipeline presentation. You're ready to present this week because your Sales Pipeline dashboard subscription ensures that your refreshed dashboard arrives by email with plenty of time for review. But you'll be away next week. Your office mate has agreed to cover for you, but what about the pipeline presentation? Not to worry. You can now add additional people as dashboard subscribers. Everyone you add will receive a refreshed dashboard by email according to the schedule you set up.


Add Dashboard Subscriptions for Others in Lightning Experience

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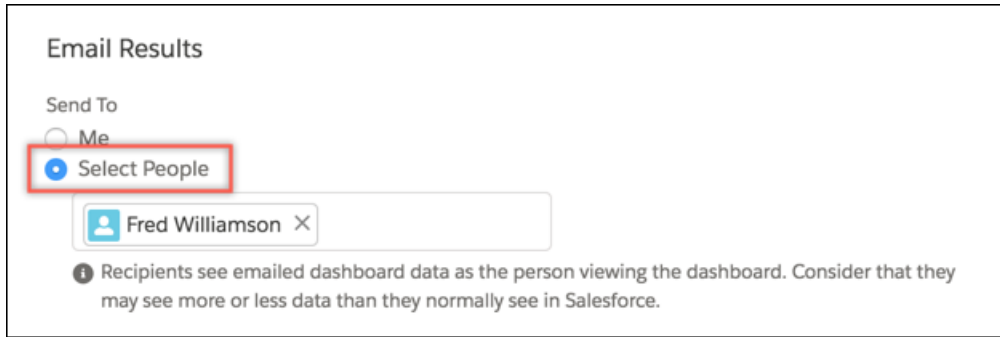
Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who: To add subscribers to a dashboard, you need the **Subscribe to Dashboards: Add Recipients** user permission.

Why: Adding other people as subscribers is a perfect way to share updated dashboards on a regular schedule. Everyone you designate gets the same information and visuals at the same time every day, week, or month.

How: On the Dashboards page, click  next to the dashboard name, and select **Subscribe**. (You might need to scroll to the right to scroll to the right to see the row-level action arrow.) Alternatively, you can open the dashboard and click **Subscribe**.

After setting the subscription schedule, click **Select people** to add subscribers. You're selected by default, but you can add others, and even remove yourself if needed. Others you add must have view access to the dashboard.



As you prepare to subscribe to dashboards, take note of these considerations and allocations.

- Each person in your org can subscribe to up to 5 dashboards.
- You can subscribe to filtered dashboards, but dashboard filters are never applied to emailed dashboards.
- Dashboards that are configured to display data as **The dashboard viewer** under **View Dashboard As** settings in **Dashboard Properties** don't support subscriptions. You can't subscribe to them.

Einstein Analytics: Einstein Discovery Recommendations, Conditional Formatting, Replication Scheduling, App Templates

Get Einstein Discovery predictions and recommended actions in a Salesforce object of your choice. Automatically update dashboard widget formatting with easily set thresholds. Control when different data is updated by scheduling replication by connection. And create apps to get started fast with new Analytics Templates.

IN THIS SECTION:

[Einstein Analytics Plus Now Available, and Einstein Analytics Platform Becomes Einstein Analytics Growth](#)

We've rolled the power of Einstein Analytics along with Einstein Einstein Discovery into one convenient product— Einstein Analytics Plus. In addition, the Einstein Analytics Platform product has been renamed *Einstein Analytics Growth*.

[Analytics Onboarding, Setup, Personalization, and Collaboration: More Learning Resources, Enhanced Notifications and Annotations](#)

Get on board and get started! With new onboarding resources, such as walkthroughs and videos, it's easy and fun to learn Analytics. Personalize your Analytics experience with context-aware notifications. Collaborate by sharing filtered dashboard views in annotation Chatter posts. And set up Analytics faster with prebuilt permission sets.

[Analytics App Building: Conditional Formatting, Map Customization, Dashboard Pages](#)

Dashboards now offer conditional formatting so you can highlight dashboard widgets based on current values. Adding customized maps takes just a few clicks. The dashboard pages feature, now generally available, makes large dashboards more comprehensible and improves dashboard performance.

[Analytics Data Integration: New Connectors, Scheduling Replication by Connection, Appending Rows in Recipes](#)

Connect to even more data sources, and schedule replication by connection to get finer control over when your data is updated. Append datasets with different schemas in dataflows, and append rows in recipes.

[Analytics Prebuilt Apps: Brand-New Analytics Templates, Account-Based Marketing for B2B Marketing Analytics](#)

Prebuilt Analytics apps now include a range of Analytics Templates to help you accelerate time-to-success with the Analytics platform. There's also a new version of the B2B Marketing app that lets you analyze campaign performance by account.

[Analytics Mobile Apps: Chart Variety, Beautiful Tables](#)

Take Analytics on the go more easily with both iOS and Android devices. With the last releases, many new chart types are supported, as well as customized formatting for tables. In addition to a variety of other enhancements, you'll see new exploration capabilities for both iOS and Android.

[Display Einstein Discovery Recommendations on a Salesforce Object \(Generally Available\)](#)

Use the predictive power of Einstein Discovery to improve your everyday business decisions. With some configuration, Einstein Discovery can predict an outcome or recommend a course of action for a Salesforce object of your choice.

Einstein Analytics Plus Now Available, and Einstein Analytics Platform Becomes Einstein Analytics Growth

We've rolled the power of Einstein Analytics along with Einstein Einstein Discovery into one convenient product— Einstein Analytics Plus. In addition, the Einstein Analytics Platform product has been renamed *Einstein Analytics Growth*.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use Einstein Analytics Plus, you must have an Einstein Analytics Plus license. To use Einstein Analytics Growth, you must have an Analytics Platform license.

Analytics Onboarding, Setup, Personalization, and Collaboration: More Learning Resources, Enhanced Notifications and Annotations

Get on board and get started! With new onboarding resources, such as walkthroughs and videos, it's easy and fun to learn Analytics. Personalize your Analytics experience with context-aware notifications. Collaborate by sharing filtered dashboard views in annotation Chatter posts. And set up Analytics faster with prebuilt permission sets.

IN THIS SECTION:

[Prebuilt Permission Sets Make It Easier to Set Up the Analytics Platform](#)

The two permission sets included with every Analytics Platform license cover most Analytics use cases. Assign them to users and Salesforce takes care of the rest—no more having to build your own permission sets.

[Learn More from Help Menus and the Analytics Adventure App](#)

Each time you're working in a new area of Analytics, be sure to check the help menu. You'll find new learning resources, such as videos (now viewable directly from the help menus), walkthroughs, and the Einstein Analytics Learning Map. The help menu in each area is tailored to provide key information at the place and time you could use it.

[Go Directly from Notification to Dashboard View](#)

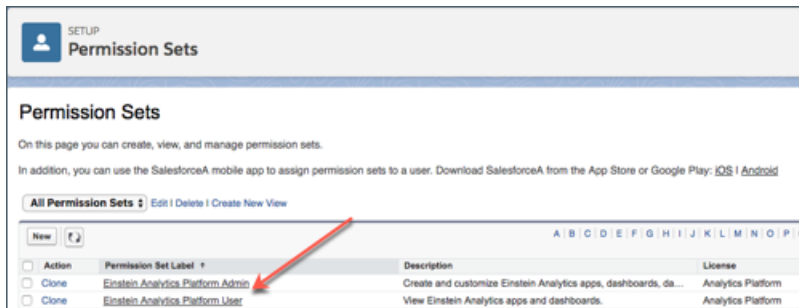
Notification links now take you to the dashboard view relevant for the notification. It works for links in notification emails, the notification manager, or a tile in the Notifications section on your Analytics home page. You immediately see the dashboard page with your filters and selections, and with the notification set up in the side panel.

[Share Dashboard Views Using Annotations](#)

With enhanced annotations, the link included in your Chatter post opens the dashboard view just as it was set up at the time you posted. In addition, the annotations panel opens with the relevant Chatter feed. When colleagues click the link in your annotation, they'll see the dashboard page with all of your filters and selections applied, and they can easily respond in the annotations panel.

Prebuilt Permission Sets Make It Easier to Set Up the Analytics Platform

The two permission sets included with every Analytics Platform license cover most Analytics use cases. Assign them to users and Salesforce takes care of the rest—no more having to build your own permission sets.



Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use prebuilt Analytics permission sets, you must have an Analytics Platform license.

Why: Previously you had to select permission set licenses, create permission sets, and assign them to users to set up Analytics in your org. No more! Now, just use the prebuilt permission sets.

Also, you used to have to create separate permission sets to manage and use Analytics apps, such as Sales Analytics and Service Analytics. Using the prebuilt sets, you can use the same process to provide permissions for Analytics platform and apps. That means less up-front and maintenance work for you.

How: Go to Salesforce Setup, select Users, then Permission Sets. Then select and assign the permission sets according to your user's needs.

- **Einstein Analytics Platform Admin** includes all the user permissions required to administer Analytics, including the permissions to create and manage templates and apps.
- **Einstein Analytics Platform User** includes permissions to use platform and app features and functionality.

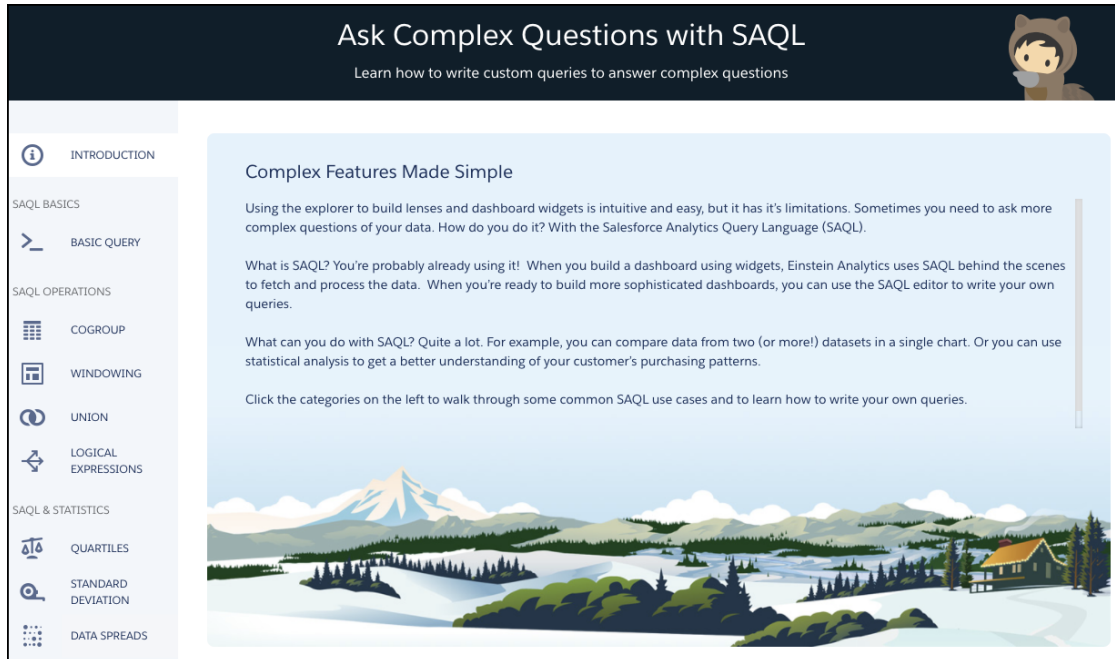
You can still create your own custom permission sets to cover unique user requirements using the existing procedures. Complete instructions can be found in Salesforce Help.

Learn More from Help Menus and the Analytics Adventure App

Each time you're working in a new area of Analytics, be sure to check the help menu. You'll find new learning resources, such as videos (now viewable directly from the help menus), walkthroughs, and the Einstein Analytics Learning Map. The help menu in each area is tailored to provide key information at the place and time you could use it.

Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

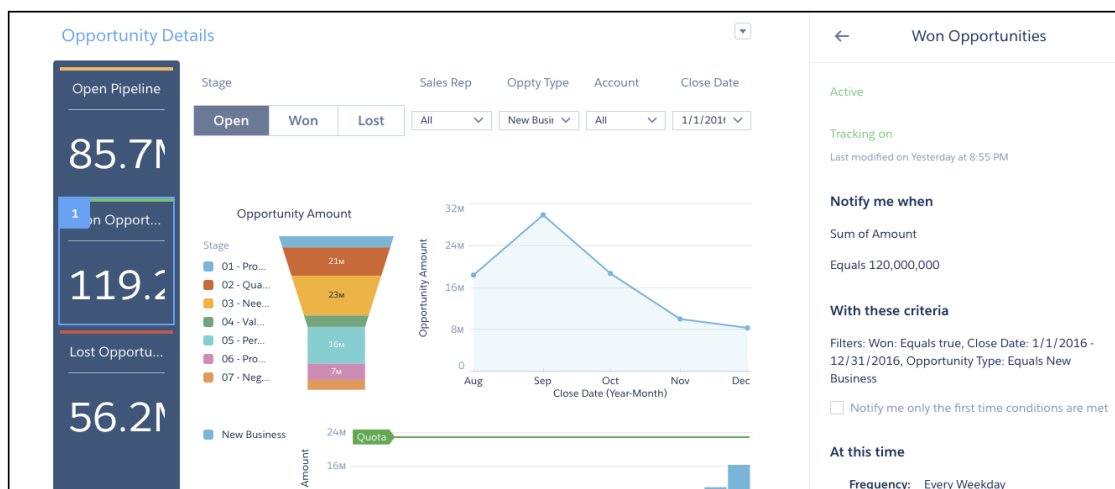
Why: In addition to help menus, learn more from the Einstein Analytics Learning Adventure app. New material about SAQL (Salesforce Analytics Query Language) takes the mystery out of customizing your queries.



How: The help menus are automatically part of your Analytics installation. Get the Einstein Analytics Learning Adventure App for free on AppExchange: <https://sfdc.co/zOqds>.

Go Directly from Notification to Dashboard View

Notification links now take you to the dashboard view relevant for the notification. It works for links in notification emails, the notification manager, or a tile in the Notifications section on your Analytics home page. You immediately see the dashboard page with your filters and selections, and with the notification set up in the side panel.



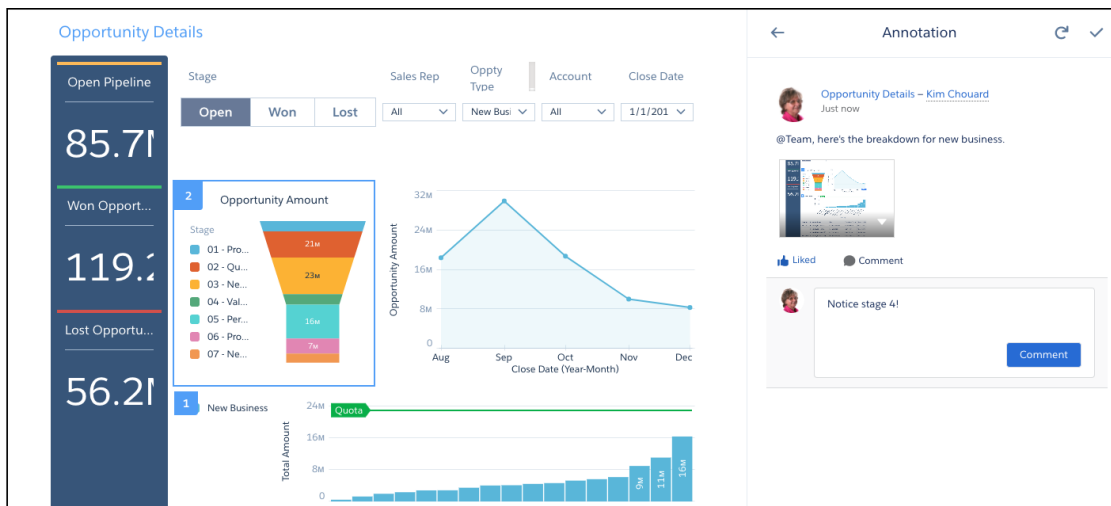
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Notifications and the dashboard views enhancement are enabled by default. To disable saved views, on the Analytics Settings page in Setup, deselect **Enable Wave dashboard saved views**.

Saving notifications with links to filtered dashboards is available in Analytics Studio and under the Analytics tab. Links that open filtered dashboards are supported in the Analytics app for iOS.

Share Dashboard Views Using Annotations

With enhanced annotations, the link included in your Chatter post opens the dashboard view just as it was set up at the time you posted. In addition, the annotations panel opens with the relevant Chatter feed. When colleagues click the link in your annotation, they'll see the dashboard page with all of your filters and selections applied, and they can easily respond in the annotations panel.



Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Annotations require administrator setup. The dashboard views enhancement is enabled by default. To disable it, on the Analytics Settings page in Setup, deselect **Enable Wave dashboard saved views**.

Posting annotations with links to filtered dashboards is available in Analytics Studio and under the Analytics tab. Links that open filtered dashboards are supported in Analytics for Communities and in the Salesforce mobile app.

Analytics App Building: Conditional Formatting, Map Customization, Dashboard Pages

Dashboards now offer conditional formatting so you can highlight dashboard widgets based on current values. Adding customized maps takes just a few clicks. The dashboard pages feature, now generally available, makes large dashboards more comprehensible and improves dashboard performance.

IN THIS SECTION:

[Expand Your Exploration Vocabulary with Improvements to Conversational Queries \(Beta\)](#)

With only a common word or two, you can start a data query, and view answers in automatically configured charts. Conversational exploration is still beta, but you'll see significant enhancements that make it easier to use, including parsing complex sentences and no limit on the number of measures and groups.

[Locate Charts More Easily](#)

To help you locate charts more quickly, we organized the chart gallery into eight categories according to chart types. And, while we were at it, we moved the gallery next to suggested charts so that you can switch between the two a lot faster.

[Customize Compare Table Column Aliases](#)

Using letter references for compare table columns can be confusing, especially when you create calculated columns or refer to them in SAQL functions and formulas. That's where user-defined column aliases come to the rescue. Replace system default column names with meaningful aliases, and see your formulas, bindings, and SAQL queries become instantly more reader-friendly.

[Automatically Highlight Data with Conditional Formatting](#)

Don't delay important decisions because you miss critical changes in your data. With clicks, not code, add rules to automatically format results to quickly catch changes and take immediate action. For example, highlight accounts in a bar chart in red when their CSAT scores drop below 80% so that you can get on the phone with those customers.

[Break Up Monolithic Dashboards to Improve Performance \(Generally Available\)](#)

Make the information on a dashboard easier to digest by chunking the content into multiple pages. With pages, you can tell a story by creating a dynamic pathway through your dashboard. Depending on how you lay out your pages, you can create some cool effects as you transition from one page to the next. And because a page has fewer queries, dashboard performance increases.

[Zoom In on Maps to Focus on Regions](#)

You might not do business in every region shown a map. If needed, edit the map and change its boundaries to focus on a particular region.

[Add Date Filters More Quickly](#)

We took the best date filter features and applied them consistently across widgets. You can now filter by absolute, relative, and preset dates in both date widgets and global filters. With presets, you no longer have to define static steps to create filters on Current Year and Last Month—they're available, by default. For a date widget, you can also specify whether it shows absolute, relative, or preset dates.

[Change the Labels and Colors of Dataset Dimension Values](#)

Change the display labels and default colors of dimension values to make them easier to understand and spot. The label doesn't change the underlying data stored in the dataset or the API names of the fields. The change only affects the appearance in the user interface.

[Choose the Default Dataset Fields That Appear in a Table](#)

Make tables your own by choosing the default fields. For example, show the most commonly used fields in a particular order. If you don't set the defaults, the first five measures and five dimensions are selected in alphabetical order.

[Keep Your Assets in Order with Synced App Navigation](#)

When you move a dashboard or lens from one app to another, Analytics automatically updates the navigation in both apps. Whether you move or delete an asset from an app, when you open the navigation panel, you see an updated list of dashboards and lenses.

[Get Familiar with JSON Changes for Dashboard Designer](#)

The dashboard JSON contains new and deprecated parameters that impact users who create the JSON from scratch.

[Updates to the REST API](#)

Review the latest updates to the REST API and associated representations.

[Test Analytics Template Rules Files](#)

Take the guesswork out of Analytics template files by testing them against the new API endpoint `jsonxform/transformation` before deploying a template. No more waiting until your template is live to be sure that you created all your rules correctly.

[Other Enhancements to Analytics Charts and Dashboards](#)

Check out the usability enhancements to Analytics charts and the consistency applied to measures across widget types.

Expand Your Exploration Vocabulary with Improvements to Conversational Queries (Beta)

With only a common word or two, you can start a data query, and view answers in automatically configured charts. Conversational exploration is still beta, but you'll see significant enhancements that make it easier to use, including parsing complex sentences and no limit on the number of measures and groups.


Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

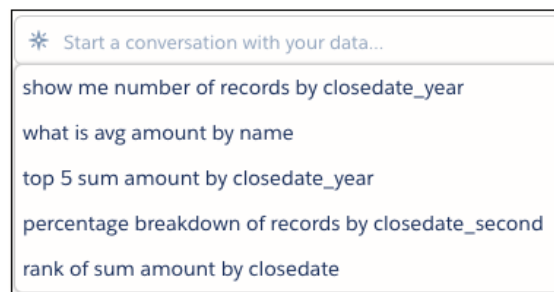
Who: To explore data with conversational queries in running apps and in the explorer, users must have the Use Analytics permission. To explore data with conversational queries in the dashboard designer, users must have the Create and Edit Analytics Dashboards permission.

Why: Guided conversations reduce the number of clicks to explore data, and now you'll see improved auto-suggestions. New conversational possibilities include the following.

- Your query no longer needs to start with or include a measure. For example, you can type "show me industries" or "agent and case origin." If a measure isn't specified, the response is aggregated by count of rows.
- You can use new filter and function words, like "without," "filter out," "excludes," and "percentage change."
- You can include multiple measures or groups separated by commas, for example, "revenue, percentage by agent, state, product."
- You can filter by multiple dimension values using parentheses, for example, "amount for industry equals (Agriculture, Banking, Communications)."

How: To enable this feature on the Analytics Settings page in Setup, select **Enable Conversational Exploration (Beta)**. Conversations are then available in running apps, explorer, and dashboard designer.

To start a conversation, click . Click the text box to see suggestions, or just start typing your own query.



SEE ALSO:

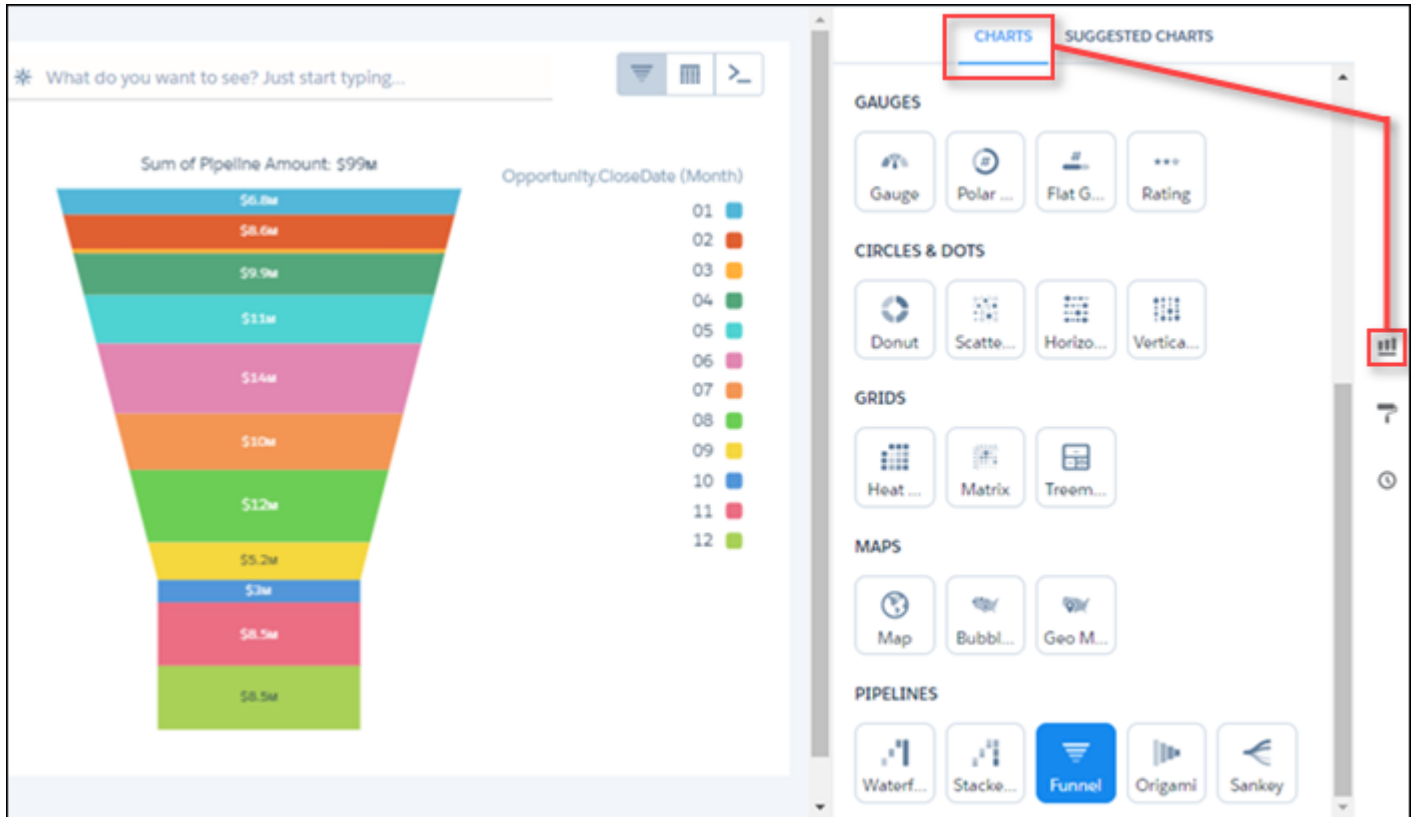
[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Locate Charts More Easily

To help you locate charts more quickly, we organized the chart gallery into eight categories according to chart types. And, while we were at it, we moved the gallery next to suggested charts so that you can switch between the two a lot faster.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in the Developer Edition and, for an extra cost, in Enterprise, Performance, and Unlimited Editions.

How: To select a chart from the gallery or use suggested charts, click the **Charts** icon () in the quick access menu.



With this change, users can no longer access the chart gallery from the **Chart Mode** button in the Explorer.

Customize Compare Table Column Aliases

Using letter references for compare table columns can be confusing, especially when you create calculated columns or refer to them in SAQL functions and formulas. That's where user-defined column aliases come to the rescue. Replace system default column names with meaningful aliases, and see your formulas, bindings, and SAQL queries become instantly more reader-friendly.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in the Developer Edition and, for an extra cost, in Enterprise, Performance, and Unlimited Editions.

How: To enter a column alias, from the column's action menu, click **Edit this Column**. In the **Editing Column** pane, replace the default column alias with a name of your choice. Click **Apply** when done.

	A	B
Forecast Category	Avg of Amount	Sum of Amount
Best Case	\$518,826	\$36,836,670
Closed	\$649,740	\$1,508,045,520
Commit	\$475,473	\$25,675,535
Omitted	\$660,281	\$492,569,849
Pipeline	\$666,770	\$514,746,311

EDITING COLUMN

Column Alias
Enter an alias for column B...

Column Header
Enter a column header...

Calculation
Formula $f(x)$ ▾

Functions ▾ Fields ▾

Enter a column formula, for example (A*100)/B...

Close Apply

 **Note:** In a compare-table formula, when you reference columns by default column names or user-defined column aliases, you can't use raw field names in that formula.

Automatically Highlight Data with Conditional Formatting

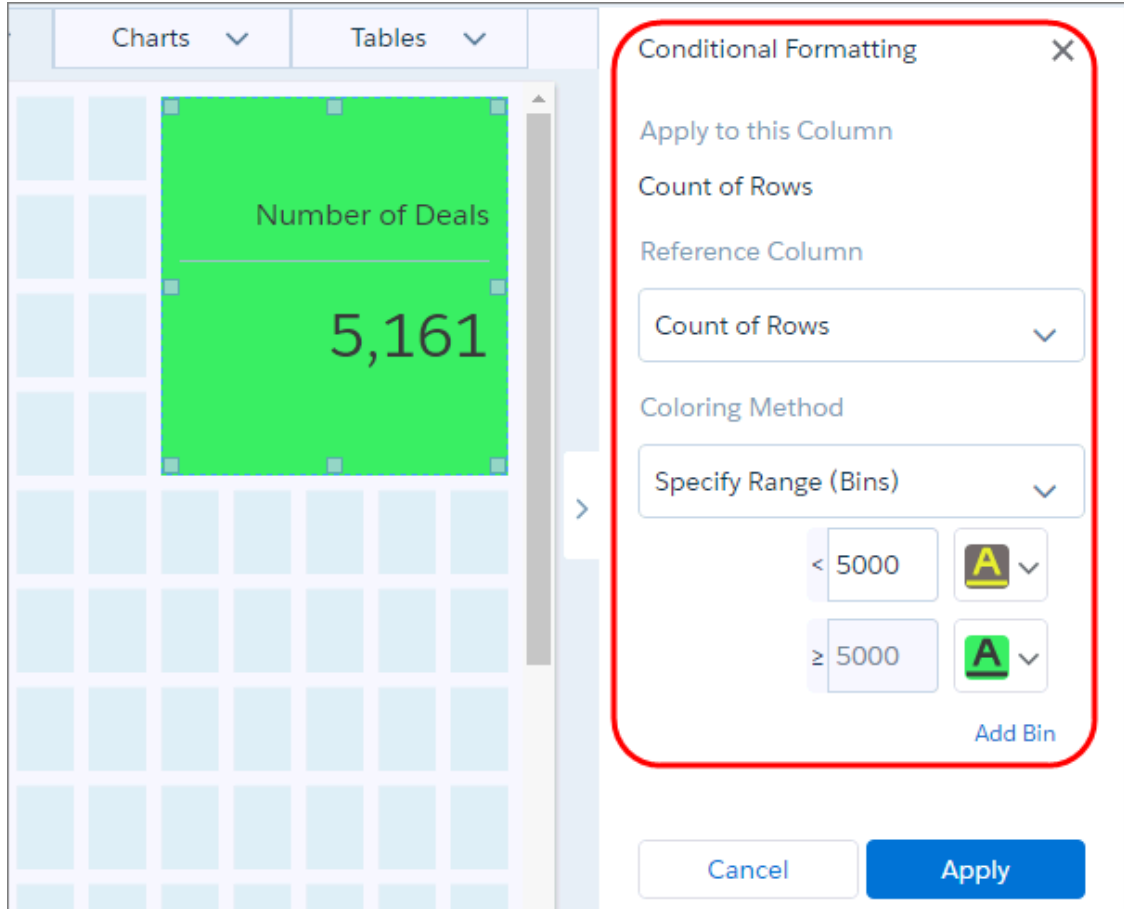
Don't delay important decisions because you miss critical changes in your data. With clicks, not code, add rules to automatically format results to quickly catch changes and take immediate action. For example, highlight accounts in a bar chart in red when their CSAT scores drop below 80% so that you can get on the phone with those customers.

Where: This feature is available in Einstein Analytics dashboard designer—not classic designer—in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

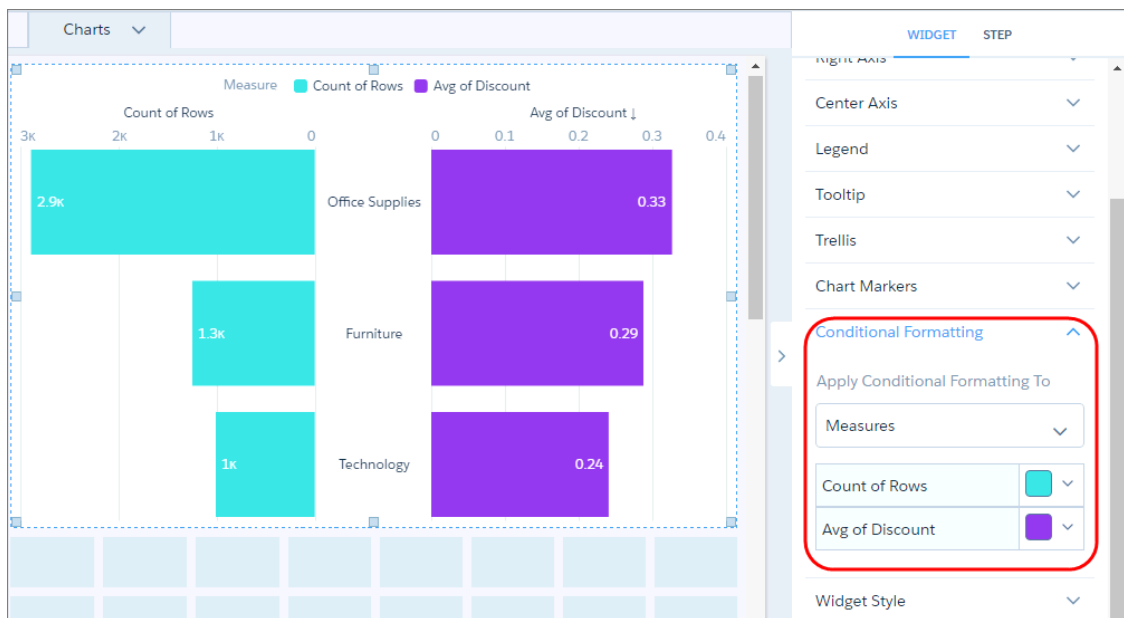
Why: Use rules to automatically highlight charts, tables, and number widgets in your dashboard. Stay on top of each KPI by highlighting the highs and lows based on ranges and colors that you specify. Or, distinguish each measure or dimension value (group) by color-coding them.

For example, you can apply conditional formatting to accomplish the following goals.

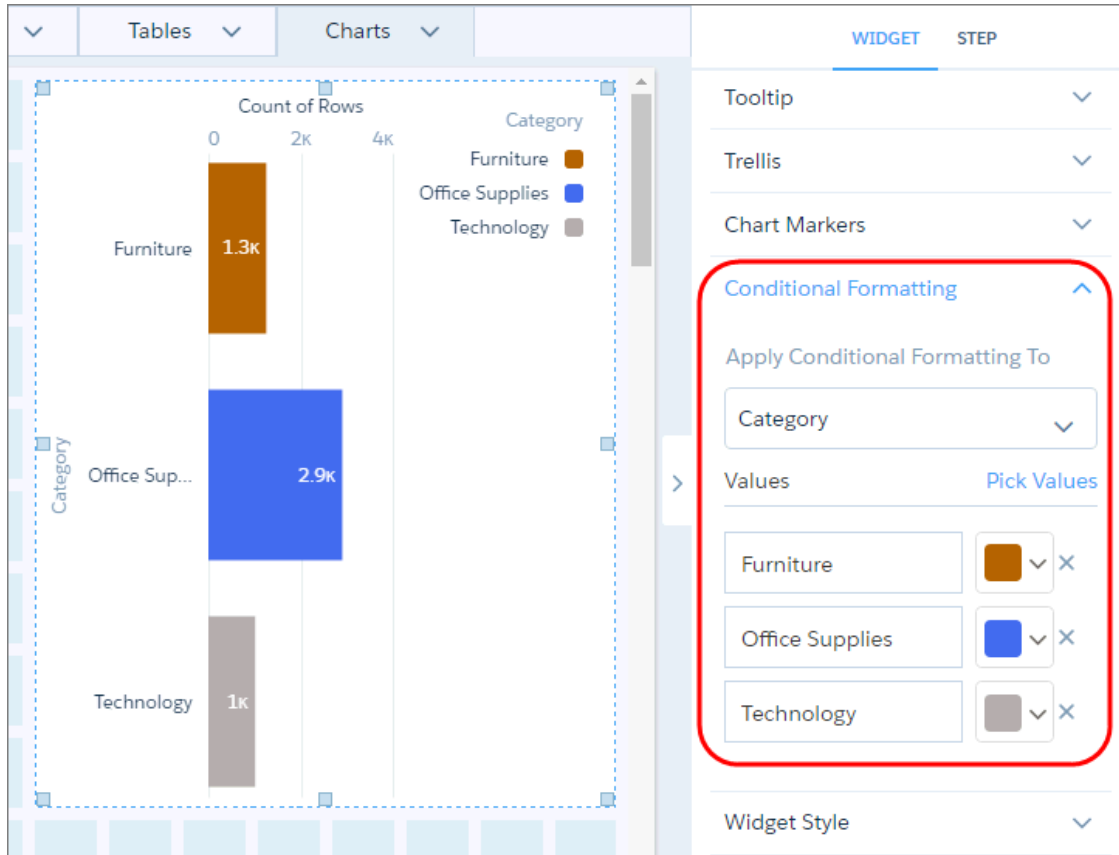
- Determine how well you're doing on a KPI by coloring the number widget based on its value.



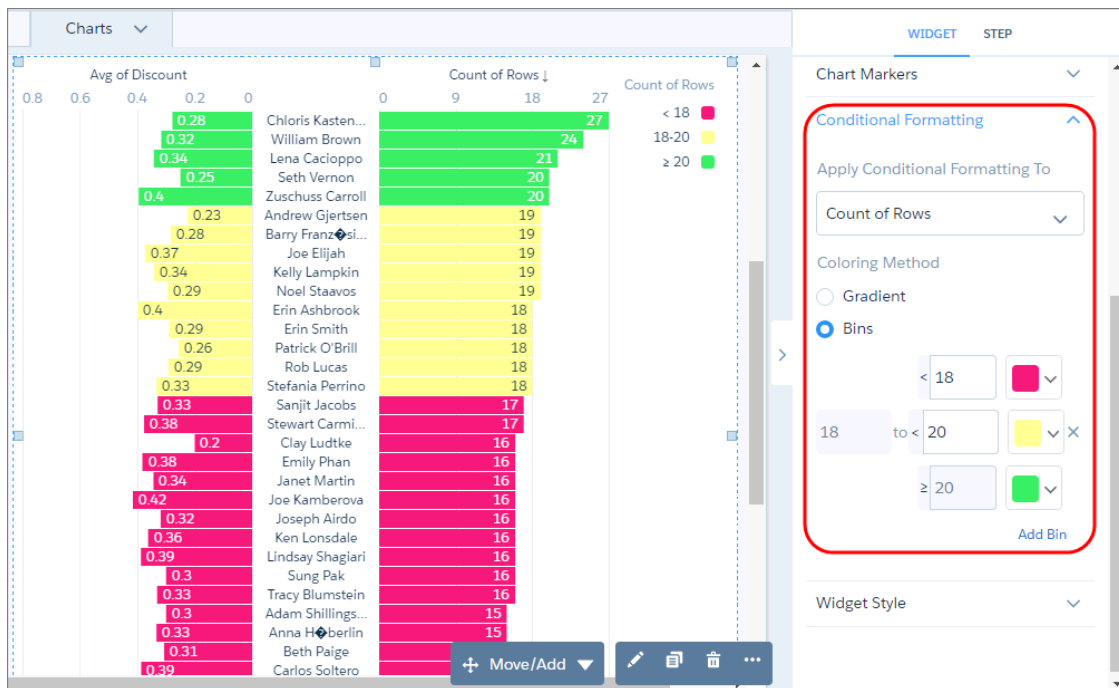
- Distinguish each measure in a chart with a unique color.



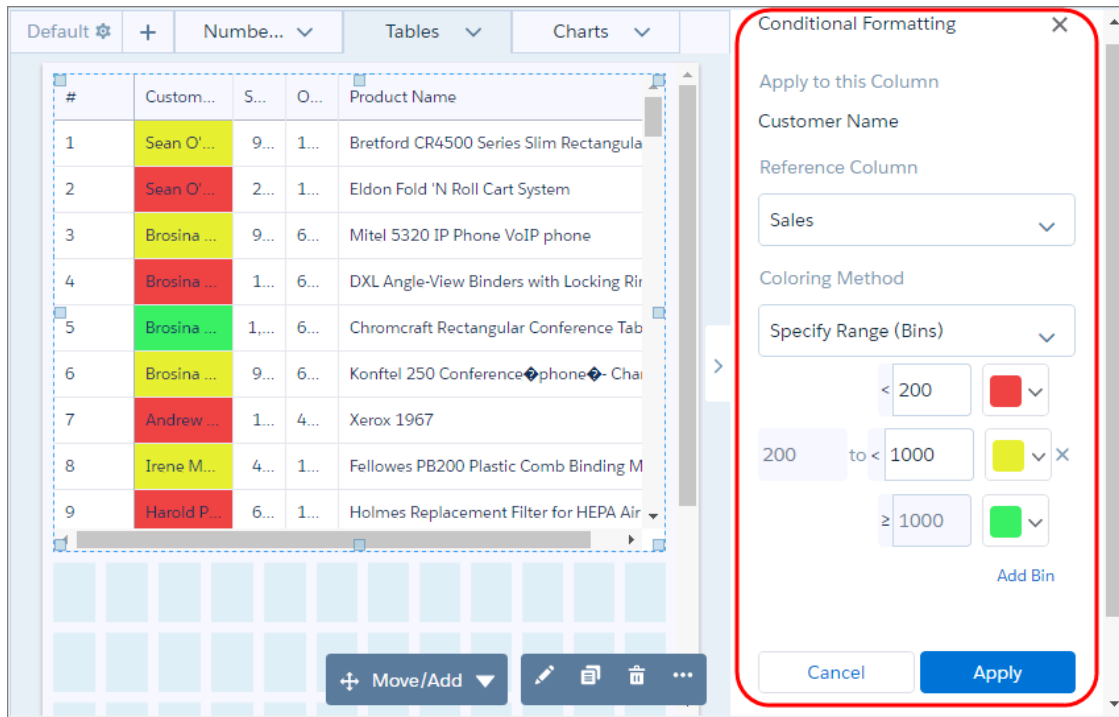
- Similarly, distinguish each dimension value (group).



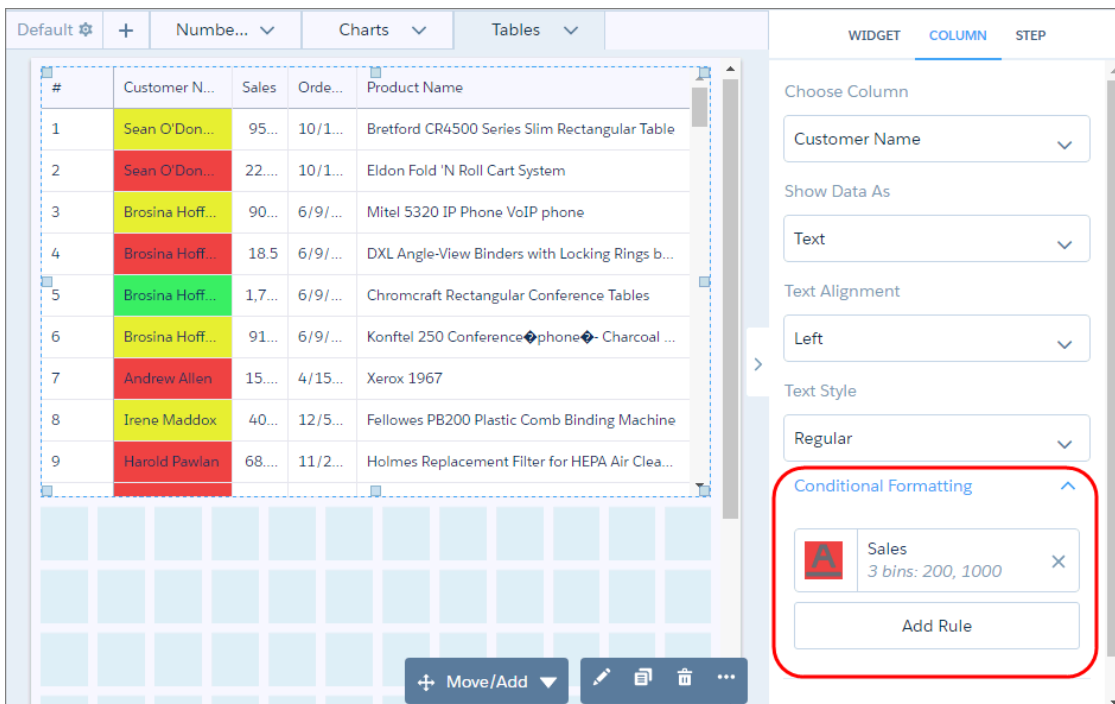
- Determine your top and bottom performers by categorizing numeric values into colored bins. You can add up to 10 bins.



- Focus on key table records by color-coding the text or background of a column's cells. In the following example, the Customer Name column is colored based on the value of the Sales column.



How: Set up conditional formatting in the widget properties panel. For tables, in the Column tab of the widget properties, select the column that you want to format and then set the rule used to format it.



If you change the widget or chart type, conditional formatting is retained because it applies to the underlying step. Conditional formatting overrides colors set on dimension values in the dataset XMD.

To set up complex rules based on multiple reference columns for number and table widgets, use SAQL. In the SAQL query, define the rules and output the colors to a new column. Specify the colors in hex codes (like #CCCC00) or RGB color codes (like rgb(255,255,255) or rgba(255,255,255,0)). For example, the following query specifies the rule and outputs the hex color code for each condition in the "FormatColor" column.

```
"query": "q = load \"Sample_Superstore_with_Goals\";\n  result = group q by 'Segment';\n  result = foreach result generate\n    q.'Segment' as 'Segment',\n    sum(q.'Discount') as 'Discount',\n    sum(q.'Profit') as 'Profit',\n    sum(q.'Quantity') as 'Quantity',\n    sum(q.'Sales') as 'Sales',\n    (case\n      when Segment == \"Consumer\" and sum(q.'Discount') >= 1000 then \"#008000\"\n      when Segment == \"Consumer\" and sum(q.'Discount') < 1000 then \"#CCCC00\"\n      when Segment == \"Corporate\" and sum(q.'Discount') >= 500 then \"#008000\"\n      when Segment == \"Corporate\" and sum(q.'Discount') < 500 then \"#CCCC00\"\n      when Segment == \"Home Office\" and sum(q.'Discount') >= 200 then \"#008000\"\n\n      when Segment == \"Home Office\" and sum(q.'Discount') < 200 then \"#CCCC00\"\n\n      else \"#000000\" end) as 'FormatColor';\n  result = order result by ('Sales' desc);\n  result = limit result 2000;";
```

To apply the colors to a widget, in the widget properties, select the new color column ("FormatColor") in the Reference Column property and then select **Use Reference Column Value** in the Coloring Method option.

Conditional Formatting

Apply to this Column

Sales

Reference Column

FormatColor

Coloring Method

Use Color in Reference Column

Style

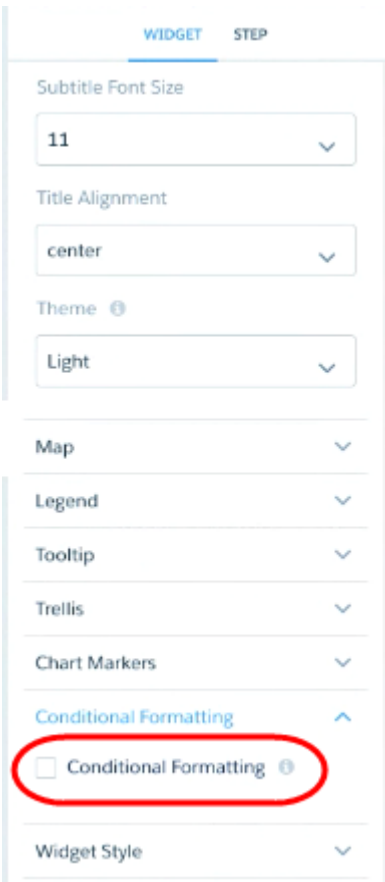
Text Color


Cancel Apply

Consider the following behavior changes between the previous release and Summer '18.

- In the previous release, coloring options for charts were set in various sections of the widget properties. For example, you set coloring options for heatmaps in the Heat Map section. As of Summer '18, set them in the Conditional Formatting section.

- Existing dashboards that use chart binning and gradient continue to work as they did in previous releases. However, you can't change these configurations using the old method. To change the configurations in Summer '18, select **Conditional Formatting** in the widget properties to enable the new conditional formatting feature, and then set up the conditional formatting rule.



-  **Note:** After you enable conditional formatting in an existing chart, the conditional formatting settings are no longer tracked in the dashboard JSON, instead, they're included internally (in the asset XMD).

Important Tidbits about Conditional Formatting

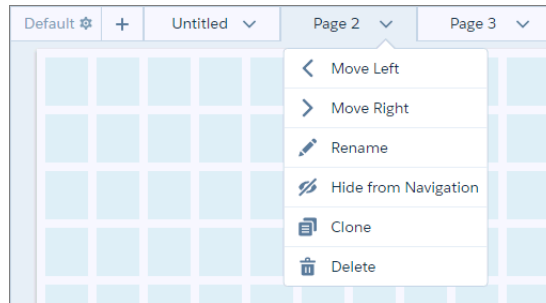
- Conditional formatting is fully packageable. When you migrate a dashboard using change sets and packaging, the conditional formatting (included in the asset XMD) is included as well. We strongly recommend that you back up and migrate your dashboards this way.
- The conditional formatting user interface doesn't currently support bindings. However, dynamic thresholds (bindings) for table conditional formatting can be implemented using SAQL. (See the SAQL example for complex rules in this topic.)

Break Up Monolithic Dashboards to Improve Performance (Generally Available)

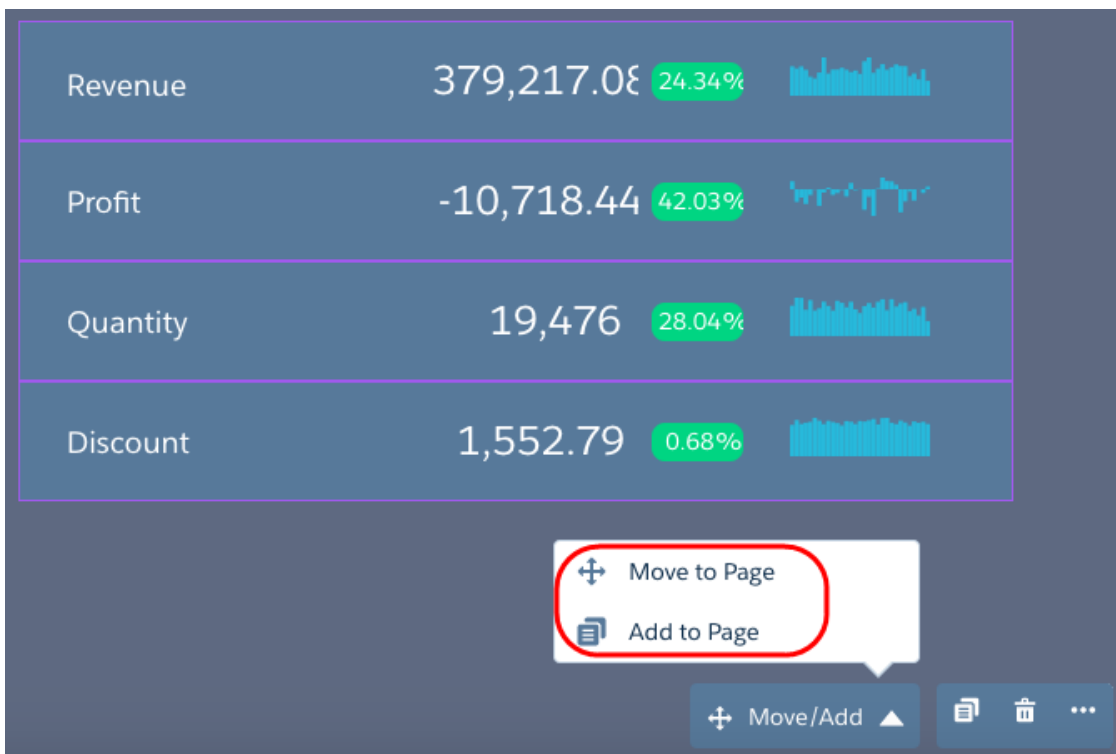
Make the information on a dashboard easier to digest by chunking the content into multiple pages. With pages, you can tell a story by creating a dynamic pathway through your dashboard. Depending on how you lay out your pages, you can create some cool effects as you transition from one page to the next. And because a page has fewer queries, dashboard performance increases.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

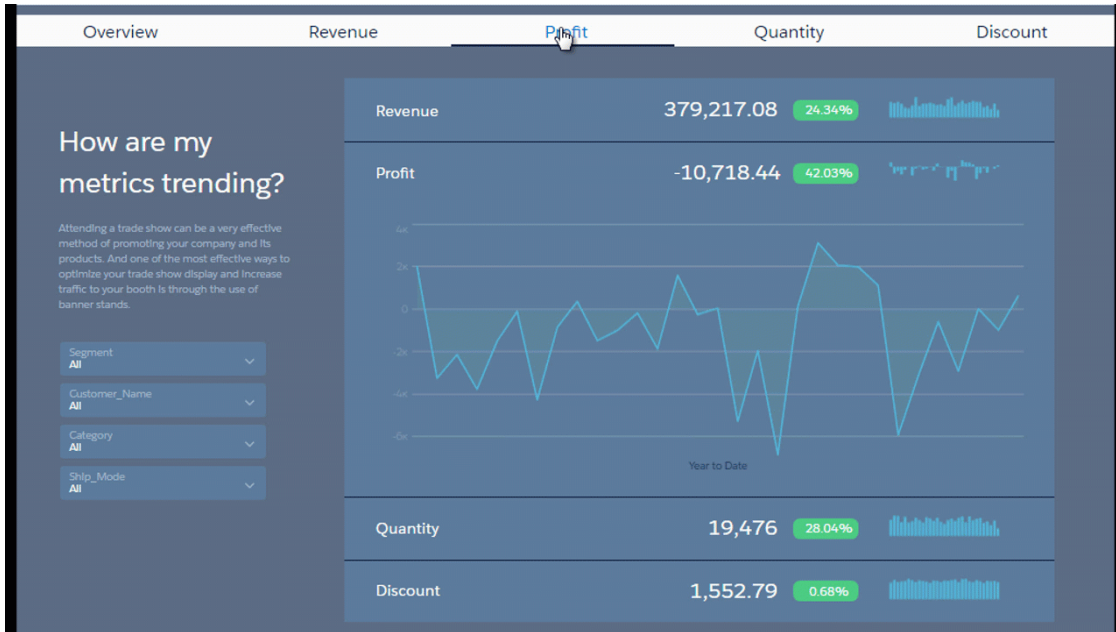
How: Every dashboard created in Summer '18 has one untitled page. Click **+** to add another page. Each page appears as a separate tab. You can add up to 20 pages per dashboard. Click **▼** next to a page to configure it, like rename it or hide it from the Navigation widget when a user views the dashboard.



You can move and share widgets across pages in a dashboard. If you select a widget and add it to another page, you add an instance of the same widget to the page—basically the widget is shared across both pages, making it easier to maintain.



Add a navigation widget to a page to allow the dashboard viewers to navigate to other pages.



To enable navigation for all pages, select a page's navigation widget and use the **Add to Page** action to add it to other pages. Using Add to Page ensures that all of the styling properties you set for the widget reflects across all pages. Otherwise, each widget has its own styling.

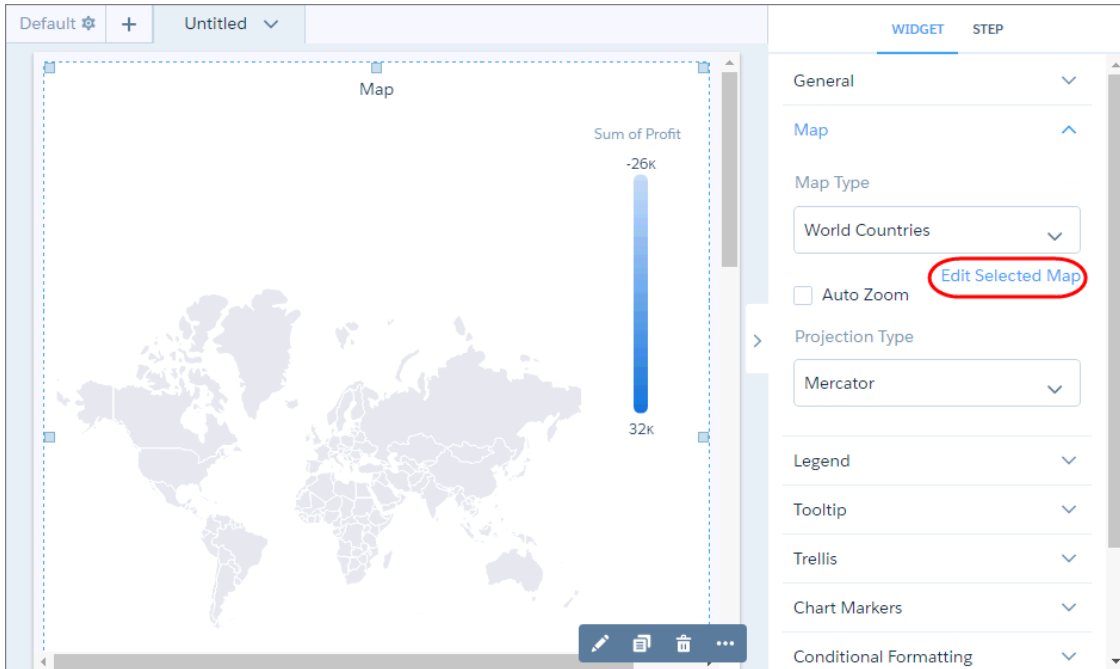
Pages apply to the layout in which they're created. Open another layout to add pages to it. If no navigation widget is added to the mobile layout, the Einstein Analytics mobile app users can swipe to traverse the pages. If a navigation widget is present, swiping is disabled.

Zoom In on Maps to Focus on Regions

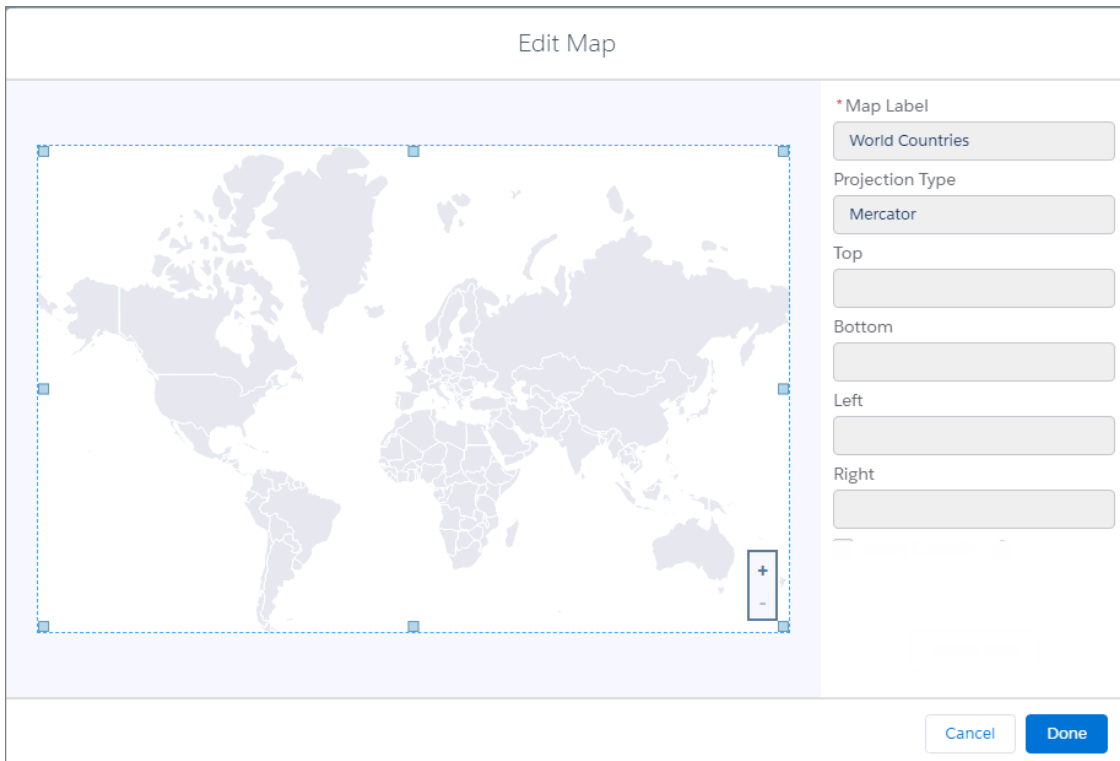
You might not do business in every region shown a map. If needed, edit the map and change its boundaries to focus on a particular region.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Select a map widget, choose the map type, and select **Edit Selected Map**.



Drag the handles of the map to change the boundaries and zoom in on a particular region.

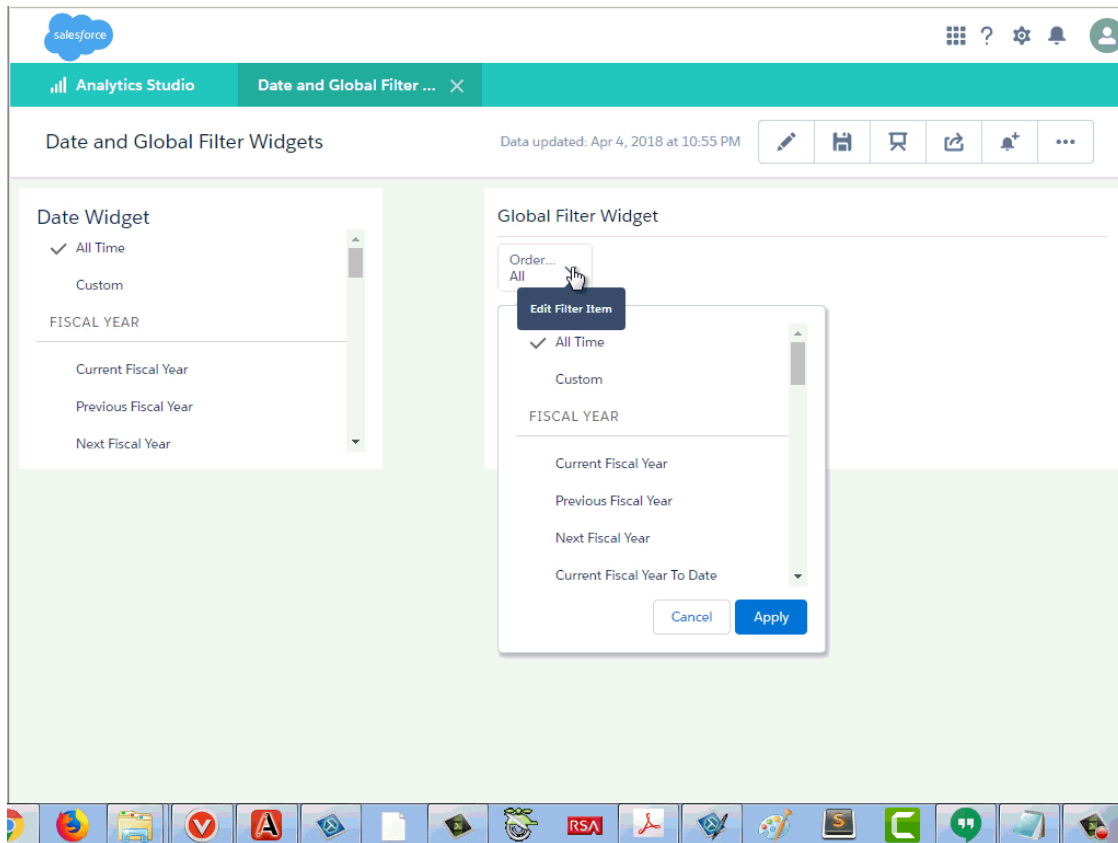


Add Date Filters More Quickly

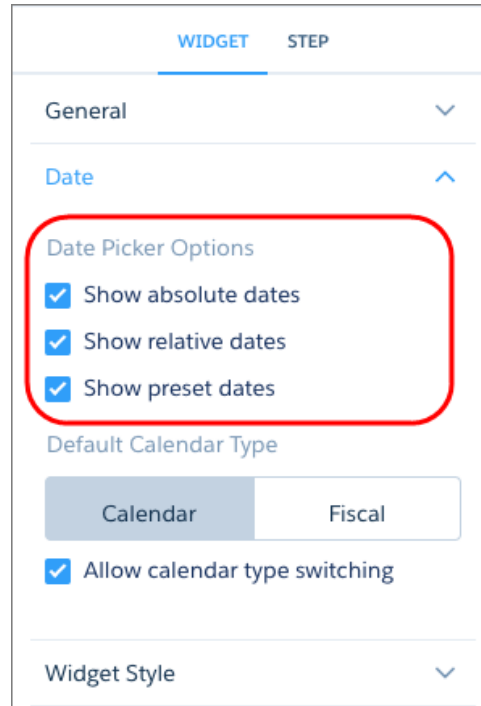
We took the best date filter features and applied them consistently across widgets. You can now filter by absolute, relative, and preset dates in both date widgets and global filters. With presets, you no longer have to define static steps to create filters on Current Year and Last Month—they're available, by default. For a date widget, you can also specify whether it shows absolute, relative, or preset dates.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Notice the similarities for both date and global filter widgets and how easy it is to apply date filters.



How: For a date widget, configure the widget properties to show or hide absolute, relative, and preset dates when users view the dashboard.



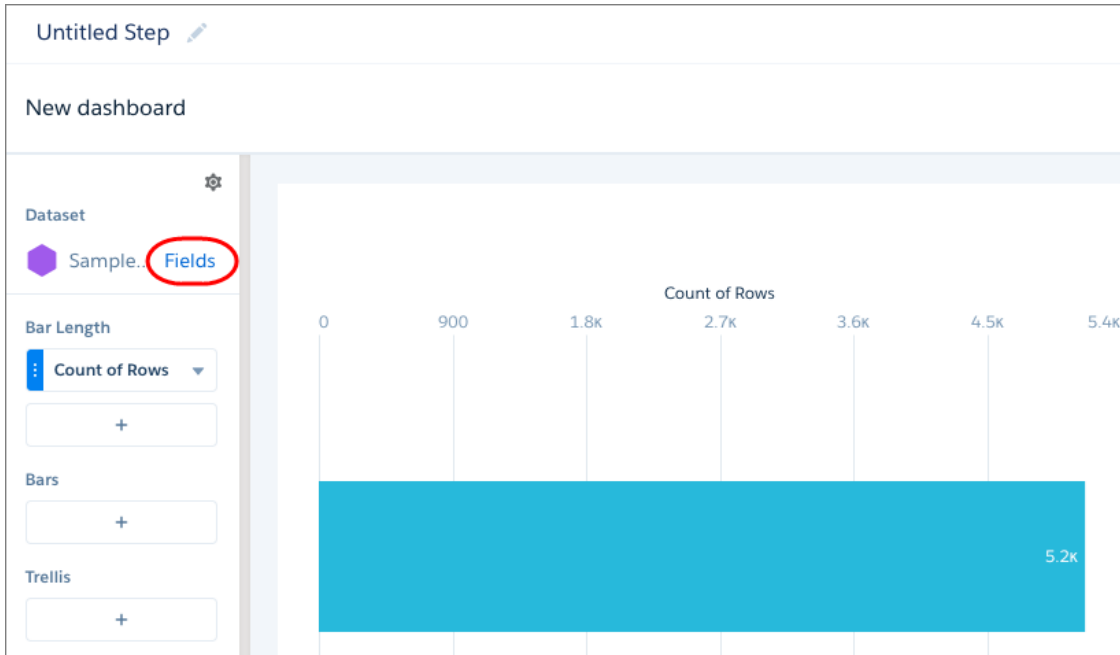
Unlike the previous release, you can no longer set the default mode for a date widget to show absolute or relative dates. Now, if you enable absolute and relative dates, absolute dates show, by default. To show relative dates, by default, set an initial selection based on a relative date.

Change the Labels and Colors of Dataset Dimension Values

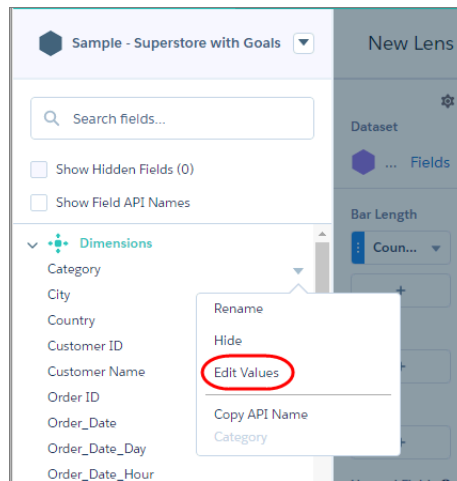
Change the display labels and default colors of dimension values to make them easier to understand and spot. The label doesn't change the underlying data stored in the dataset or the API names of the fields. The change only affects the appearance in the user interface.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

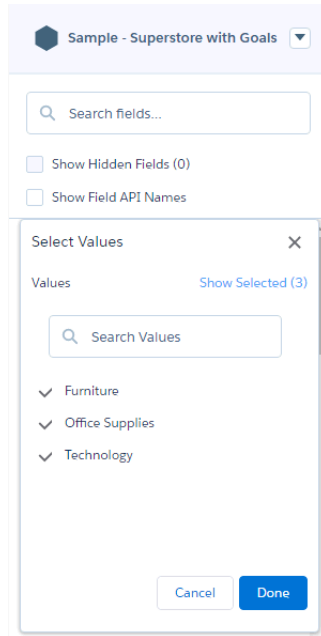
How: While exploring a dataset as a lens or creating a step in the dashboard designer, click **Fields**.



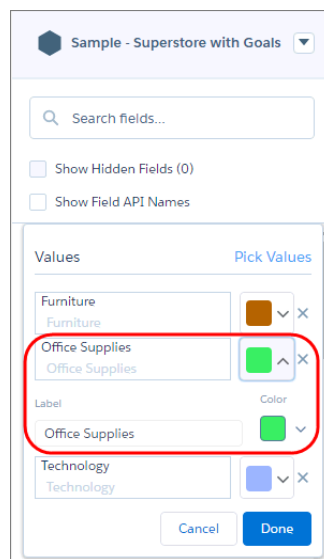
Click the dropdown arrow next to the dimension, and select **Edit Values**.



Select the dimension values to edit, and click **Done**.



You can change the default color and label for each dimension value.



Click **Save** to save the changes.



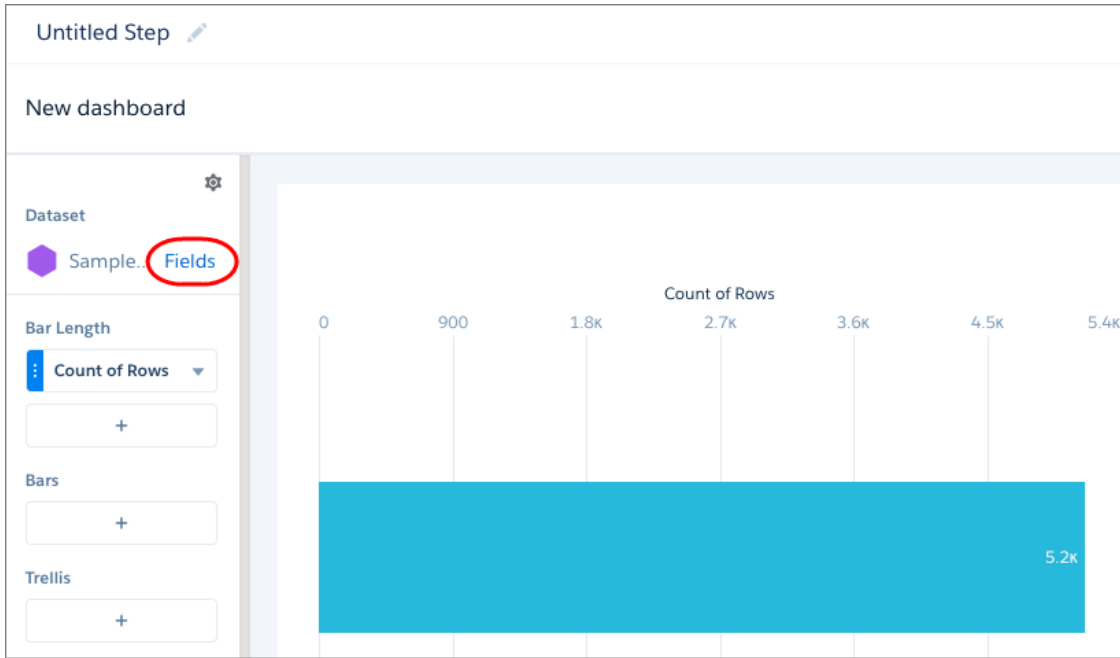
Note: Because these changes are done at the dataset level, the changes affect all charts and tables that use this dimension. However, you can override the default colors for a specific chart by setting conditional formatting in the chart's widget properties.

Choose the Default Dataset Fields That Appear in a Table

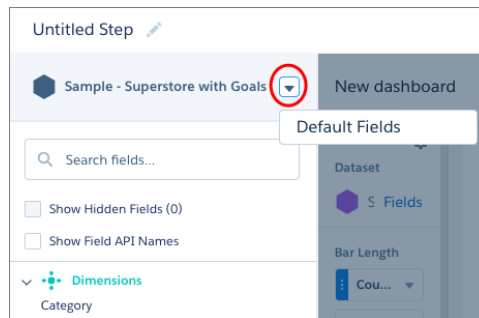
Make tables your own by choosing the default fields. For example, show the most commonly used fields in a particular order. If you don't set the defaults, the first five measures and five dimensions are selected in alphabetical order.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

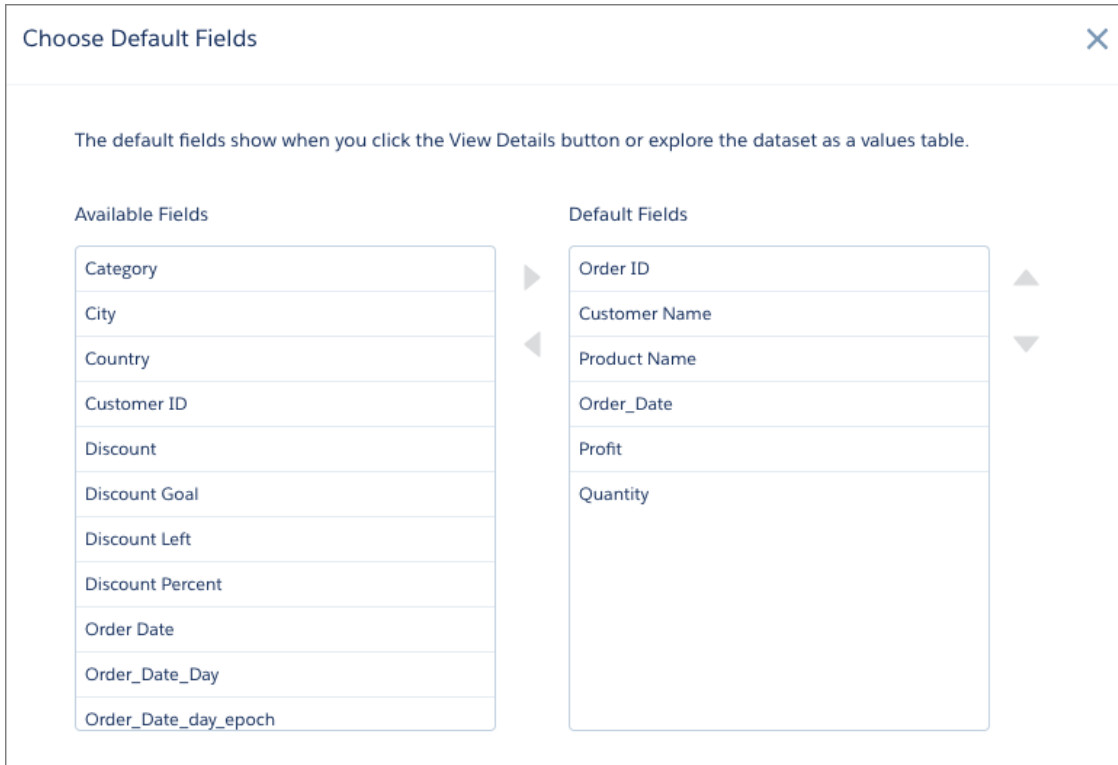
How: While exploring a dataset as a lens, click **Fields**.



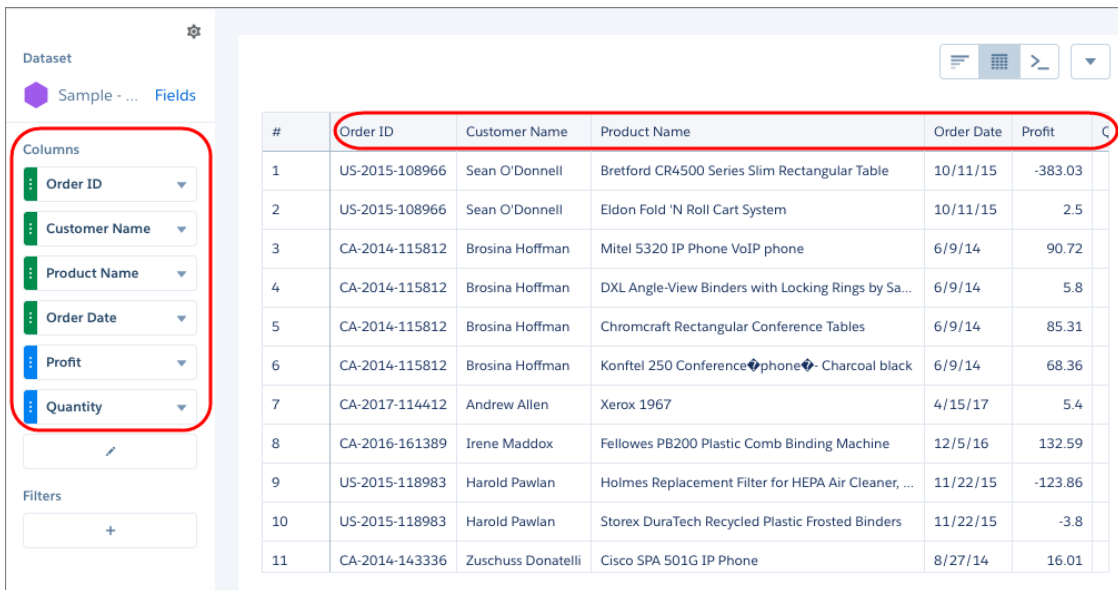
Click the dropdown arrow next to the dataset name, and select **Default Fields**.



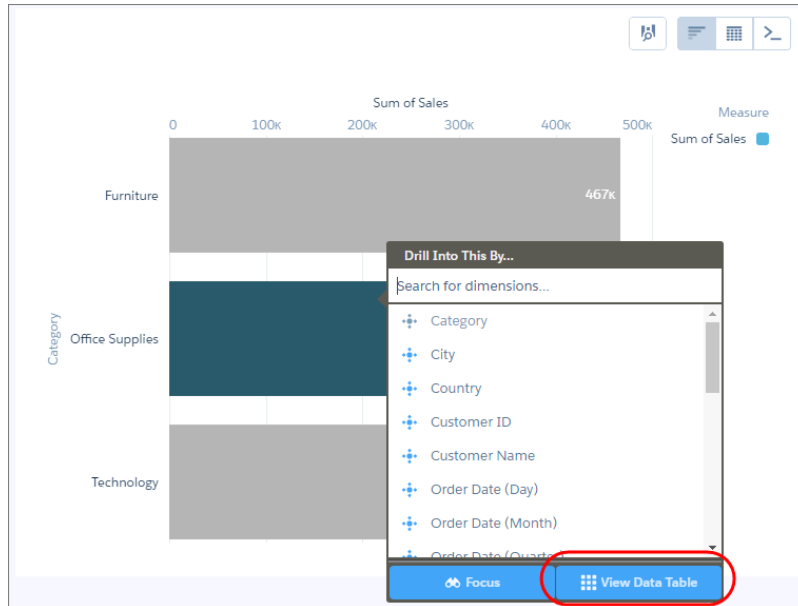
Select the fields to show by default, use the up and down arrows to reorder them, and click **Update**.



When you open the dataset as a values table, the selected fields appear in the specified order.



You see the same table columns and order when you click **View Data Table** to view the data in a tabular format.



Keep Your Assets in Order with Synced App Navigation

When you move a dashboard or lens from one app to another, Analytics automatically updates the navigation in both apps. Whether you move or delete an asset from an app, when you open the navigation panel, you see an updated list of dashboards and lenses.



Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Get Familiar with JSON Changes for Dashboard Designer

The dashboard JSON contains new and deprecated parameters that impact users who create the JSON from scratch.

The following date widget JSON parameters are deprecated.

- `defaultAbsoluteMode`
- `modeSwitchingAllowed`

The following JSON parameters are new in date widgets:

Parameter	Description
<code>absoluteModeEnabled</code>	(Boolean) Show absolute dates in the date widget when users view the dashboard. Set to <code>true</code> , by default.
<code>presetsEnabled</code>	(Boolean) Show preset dates in the date widget when users view the dashboard. Set to <code>true</code> , by default.
<code>relativeModeEnabled</code>	(Boolean) Show relative dates in the date widget when users view the dashboard. Set to <code>true</code> , by default.

This dashboard JSON snippet shows the date widget parameters, including the new ones.

```
"dateselector_1": {
  "parameters": {
    "absoluteModeEnabled": true,
    "calendarTypeSwitchingAllowed": true,
    "defaultFiscalMode": false,
    "instant": false,
    "presetsEnabled": true,
    "relativeModeEnabled": true,
    "step": "Close_Date_1",
    "title": "New Date Widget"
  },
  "type": "dateselector"
}
```

Updates to the REST API

Review the latest updates to the REST API and associated representations.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: New and updated endpoints let you work with data connectors, folders, and lenses.

/wave/dataConnectors/<connector ID>/ingest

Returns a list of ingest objects that are configured with the connection.

/wave/assets/<asset ID>/xmds/asset

Returns the extended metadata (XMD) associated with an asset, such as a lens or dashboard.

/wave/folders and /wave/folders/<folder ID>

Has a new boolean parameter `mobileOnlyFeaturedAssets`. Set this parameter to `true` to show only dashboards that are enabled for the Einstein Analytics mobile app.

/wave/lenses/<lens ID or API Name>

To support multiple datasets, the lens representation is updated to include a `datasets` property, which is a list of the datasets that the lens uses. The old `dataset` property is deprecated.

/wave/query

The SAQL query endpoint has changed to include lineage metadata. To use the updated metadata format, update your code to use the latest version of the API.

Several changes apply to dashboards and Explorer.

- Conditional formatting for charts, tables, and numbers.

- A new page navigation widget and the ability to hide pages.
- Date widget improvements.
- Compare table steps can now have a custom name. You can use the name in formulas, bindings, and lookups.

Test Analytics Template Rules Files

Take the guesswork out of Analytics template files by testing them against the new API endpoint `jsonxform/transformation` before deploying a template. No more waiting until your template is live to be sure that you created all your rules correctly.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To develop Analytics Templates, you must have an Analytics Platform license.

Why: Take the guesswork out of Analytics Template `template-to-app-rules.json` files by testing them against `jsonxform/transformation` before you deploy a template. No more waiting until your template is live to be sure that you've created all your rules correctly.

A rules file defines the rules that the template follows. A rule can specify, for example, that if an org doesn't use certain Salesforce objects, the app doesn't include them in the dataflow. Rules also define how variables are handled. For example, if a template wizard asks which account fields to include in an app, `template-to-app-rules.json` determines how that choice is reflected in dashboards.

How: To use `jsonxform/transformation`, log in to Workbench and make sure that you're using version 43.0 or higher. Then run a `post` call. If the rule works, `Jsonxform/transformation` returns the results. If not, you see errors with guidance to fix the rule.

For example `post` calls that use the provided tokens, see *Analytics Templates Developer Guide Appendix*.

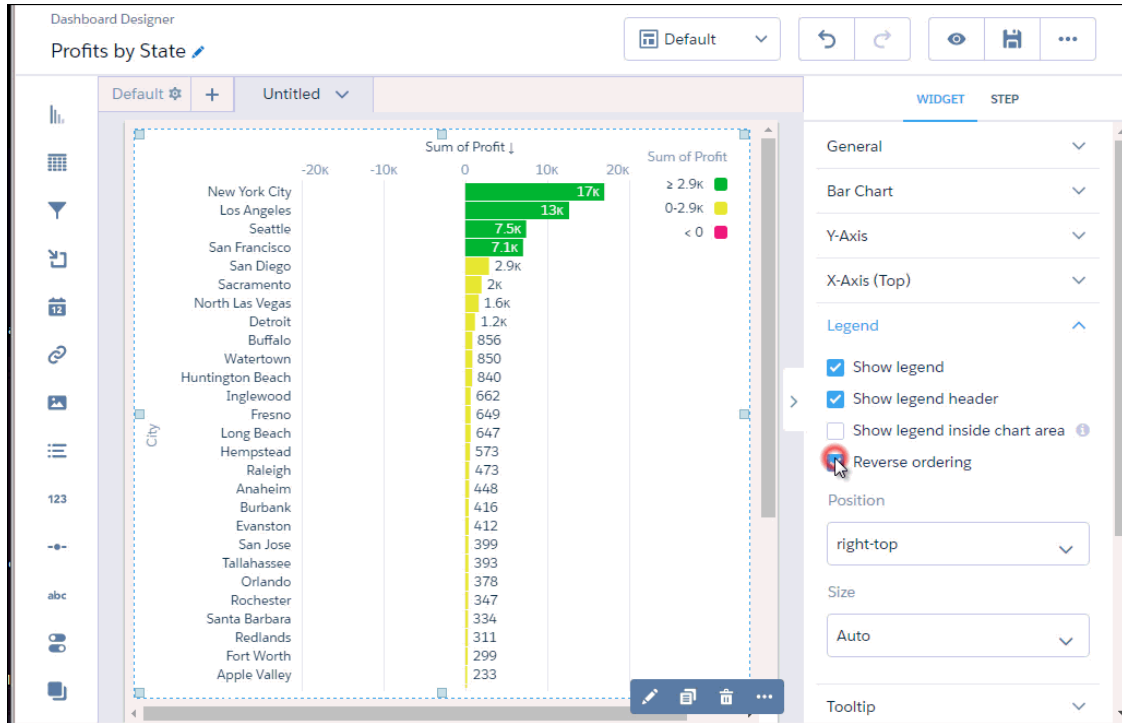
Other Enhancements to Analytics Charts and Dashboards

Check out the usability enhancements to Analytics charts and the consistency applied to measures across widget types.

Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: The following improvements were added in response to customer requests and are designed to help you get more out of Analytics.

- Reverse the order of the legend.



- Unless custom formatting is applied, number and table widgets now use the default measure format #,###.##. If you apply custom formats at multiple levels, Analytics applies formatting set at the highest level. Consider the following order of precedence (highest to lowest).
 1. Format set in number widget properties, like Shorten Number.
 2. Format set while editing a compare table column
 3. Format set for dataset fields in the explorer (or dataset XMD)
 4. Default measure format #,###.##
- You can now bind the metadata JSON properties (`numbers`, `groups`, and `strings`) for SAQL and SOQL step types. For example, if you bind a measure based on a toggle selection, you can also bind the measure in the `numbers` metadata property. The following example shows empty metadata properties for a SAQL step type.

```

"saql": {
  "type": "saql",
  "query": "q = load \"Superstore\";\n
           q = group q by 'Category';\n
           q = foreach q generate 'Category' as 'Category', count() as 'count';\n
           q = order q by 'Category' asc;\n
           q = limit q 2000;\"",
  "selectMode": "none",
  "broadcastFacet": false,
  "receiveFacet": false,
  "useGlobal": true,
  "numbers": [],
  "groups": [],
  "strings": []
}

```

- In the dataset XMD, a new `conditionalFormatting` property has been introduced for dimensions and derived dimensions. Custom color for specific dimension values are stored using this property. The `members` property still stores the custom labels for specific dimension values. You can configure this property using the UI. See [Automatically Highlight Data with Conditional Formatting](#) for details. The following example shows values for `conditionalFormatting`.

```
{
  "conditionalFormatting": {
    "chartColor": {
      "parameters": {
        "values": [
          {
            "formatValue": "#00B3B4",
            "value": "Mick Fanning"
          },
          {
            "formatValue": "#E8963B",
            "value": "Michel Bourez"
          }
        ]
      }
    },
    "referenceField": "Referral",
    "type": "categories"
  }
},
"customActions": [],
"customActionsEnabled": true,
"field": "Referral",
"fullyQualifiedNames": "Referral",
"label": "Referral",
"linkTemplateEnabled": true,
"members": [
  {
    "label": "Mick Fanning",
    "member": "Mick Fanning"
  },
  {
    "label": "Michel Bourez",
    "member": "Michel Bourez"
  }
],
"origin": "Referral",
"recordDisplayFields": [],
"salesforceActions": [],
"salesforceActionsEnabled": true,
"showInExplorer": true
}
```

Analytics Data Integration: New Connectors, Scheduling Replication by Connection, Appending Rows in Recipes

Connect to even more data sources, and schedule replication by connection to get finer control over when your data is updated. Append datasets with different schemas in dataflows, and append rows in recipes.

IN THIS SECTION:

[Connect to More Data with New Connectors and Revised Limits](#)

New remote connectors means that you can connect to even more of your data sources. Got data in SAP Hana or Microsoft Azure SQL Data Warehouse? No problem, bring it in. And to make sure that you get the most out of these new connectors, we upped the maximum number of objects that you can connect to and replicate from 50 to 100.

[Schedule Replication by Connection](#)

Not all data is created equal. Your local sales and service data could be changing constantly, but your remote product database might be a little more static. When you're replicating different data like this in Analytics, you probably don't need to update it all at the same time. Instead, use scheduling to determine when data from different sources is updated. For example, schedule your local Salesforce sales and service connection to run daily, and your product database connection to run monthly.

[Changes to Who Can Create Remote Connections](#)

To create remote connections to external data, users now require the Einstein Analytics Platform license. So that you can track who can create these connections, we added the new Add Analytics Remote Connections permission to the Einstein Analytics Platform Admin permission set.

[Upload More External Data Files](#)

To help you get more external data into Analytics, we changed the way file uploads count toward your rolling 24-hour limit. Previously, you could upload up to 50 external data files. Now the limit is 50 per dataset.

[Create and Run More Dataflows, and Track Usage with the Flow Indicator](#)

With replication enabled, you can now create up to 35 separate dataflows to prepare all that data you're bringing in. And to ensure that you get the most out of your additional dataflow definitions, we increased the number of dataflow runs that you can make in a rolling 24-hour period from 30 to 40. We also refreshed the monitor tab in the data manager to make it easier to track all these dataflows and keep an eye on how many you've run.

[Data out of Shape? Dataflow Append Doesn't Mind](#)

The append transformation used to be unforgiving and would let you append data only if it shared the same schema. Now you can merge datasets with different schemas without blowing up the dataflow. We call this feature disjoint schema append.

[Append Rows in Dataset Recipes](#)

Quickly add in rows from different datasets in a recipe. Choose the data that you want to combine, review the field mappings (which we do for you), and you're done. Use append to combine related records from different sources, such as remote Salesforce orgs, or to add new rows to fast-changing datasets, such as logs and sensor data.

[Use Multi-Select Fields for Faster Formulas in Recipes](#)

Building a formula from multiple fields in a recipe just got easier. Select the fields in the preview, choose a suggested function, and look on in awe as Analytics populates the formula for you.

[Inherit More of Your Salesforce Sharing Settings in Einstein Analytics](#)

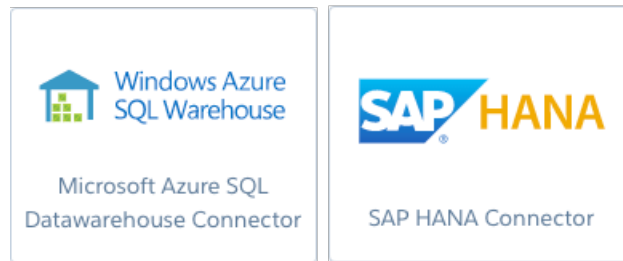
Improvements to sharing inheritance make administration easier. Support for inheriting sharing rules now includes the contact and lead objects. The number of records that a user can see from a source object has increased to 3,000 records.

Connect to More Data with New Connectors and Revised Limits

New remote connectors means that you can connect to even more of your data sources. Got data in SAP Hana or Microsoft Azure SQL Data Warehouse? No problem, bring it in. And to make sure that you get the most out of these new connectors, we upped the maximum number of objects that you can connect to and replicate from 50 to 100.

Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: To get your hands on these new connectors, in the data manager Setup tab, click **Set Up Replication**. When you add a remote connection, you see the new connectors along with those that you're familiar with.



Schedule Replication by Connection

Not all data is created equal. Your local sales and service data could be changing constantly, but your remote product database might be a little more static. When you're replicating different data like this in Analytics, you probably don't need to update it all at the same time. Instead, use scheduling to determine when data from different sources is updated. For example, schedule your local Salesforce sales and service connection to run daily, and your product database connection to run monthly.

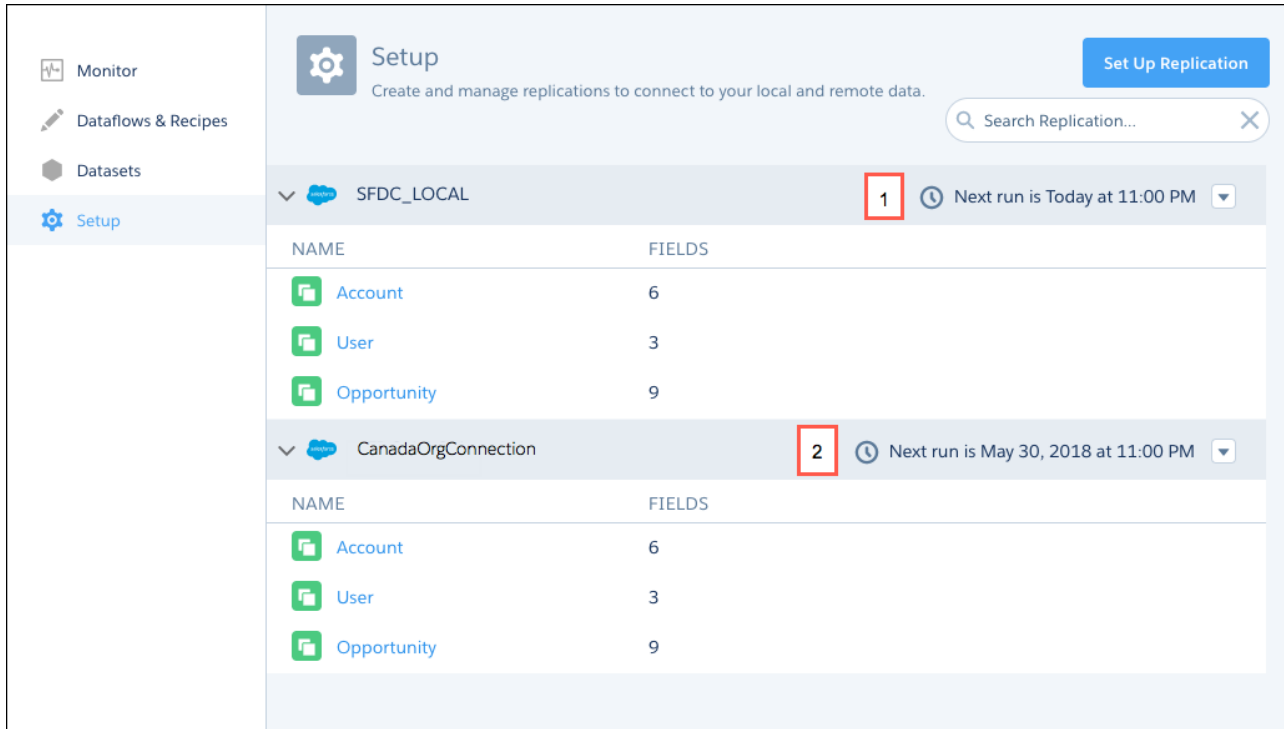
Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To schedule replication, you must have the Manage Analytics permission.

Why: Previously, you could set up only one schedule for all your replications. That works when you're replicating only Salesforce objects or using just a single remote connection. But with multiple connections, one schedule can be challenging for various reasons. For example:

- Not all data needs to be updated at the same time. Running replication that includes connections that don't need updating makes the process longer than necessary.
- Fresh replicated data is often needed at different times for your dataflows and recipes. A single schedule makes it harder to time things just right.

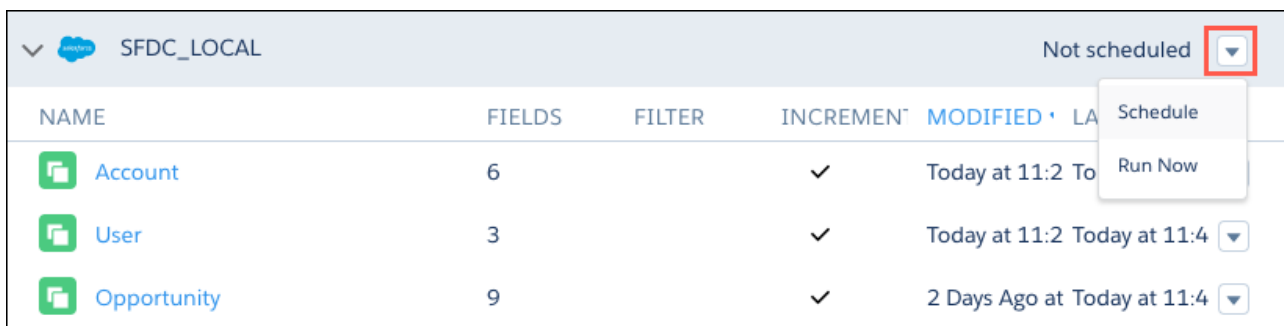
Let's look at an example of how scheduling by connection can help you.



Here, you're using the Salesforce local connection (1) to replicate sales data daily, ready to be combined using your daily dataflow. You're also using a Salesforce remote connection (2) to replicate your Canada sales data, which you append with your local data using a recipe that runs weekly.

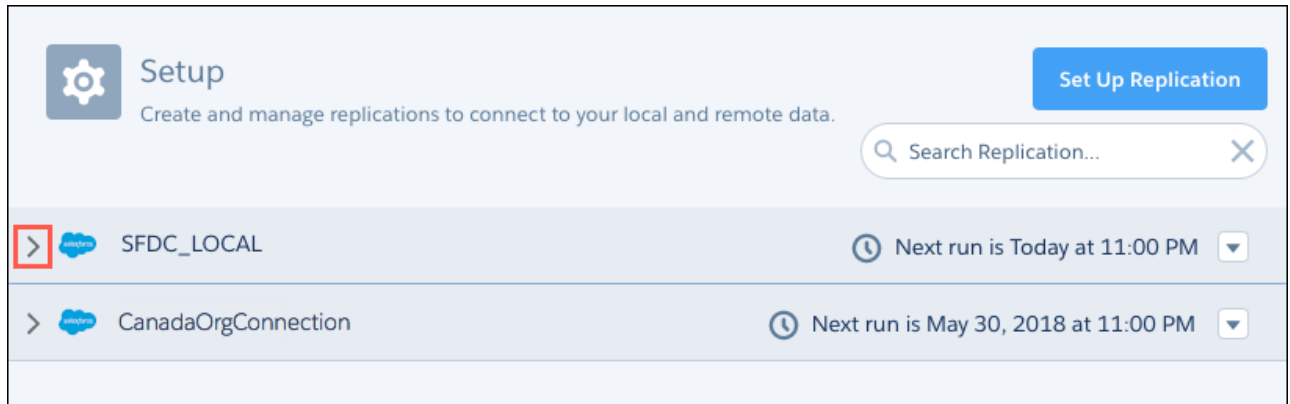
By scheduling the remote connection replication separately, you can ensure that the data is updated only when it's needed: for the weekly recipe. Your local connection replication also runs faster, without all that extra weight.

How: Scheduling by connection is ready for you on the data manager Setup tab, where your replications are now organized by connection. The schedule option is on the action menu of each connection. Notice that you can now manually run your replications by connection.



When you schedule a connection, the next run details appear next to the connection.

Tip: Try collapsing connections to see all your schedules in one place.

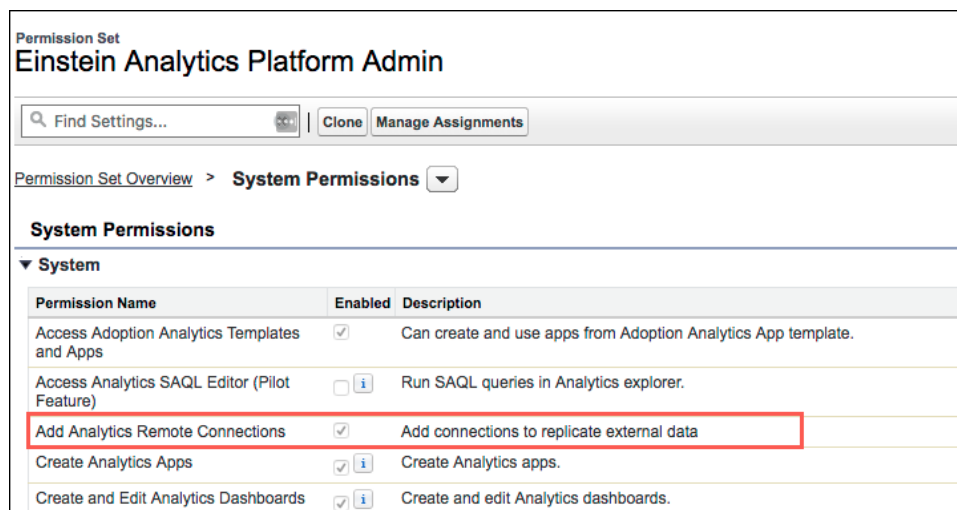


Changes to Who Can Create Remote Connections

To create remote connections to external data, users now require the Einstein Analytics Platform license. So that you can track who can create these connections, we added the new Add Analytics Remote Connections permission to the Einstein Analytics Platform Admin permission set.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: The Add Analytics Remote Connections permission is enabled by default for all users with the Einstein Analytics Platform license.



Upload More External Data Files

To help you get more external data into Analytics, we changed the way file uploads count toward your rolling 24-hour limit. Previously, you could upload up to 50 external data files. Now the limit is 50 per dataset.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Do you have datasets that you update incrementally several times a day from external data files? Fast-changing data such as logs, or sensor data? If you do, these updates can quickly eat into your 24-hour upload allowance, leaving you with nothing left for other

datasets in need of an update. That's why we changed how these uploads are counted, so that data-hungry datasets don't use up all the uploads. Now, if one dataset hits the 50-upload limit, it doesn't affect your other datasets.

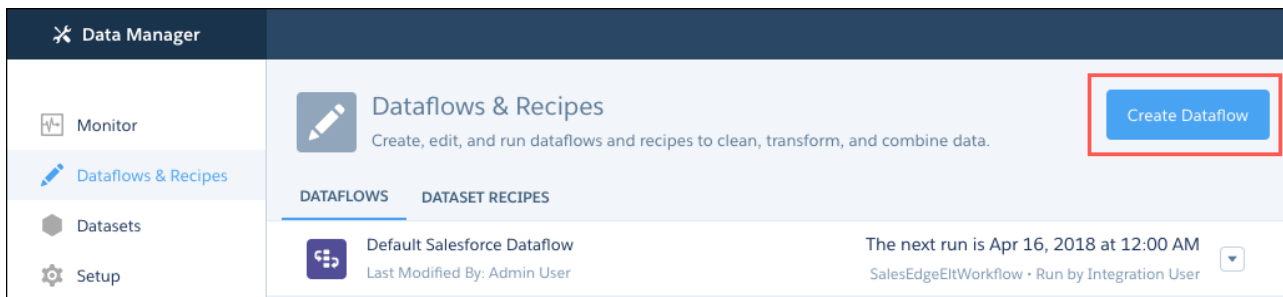
Create and Run More Dataflows, and Track Usage with the Flow Indicator

With replication enabled, you can now create up to 35 separate dataflows to prepare all that data you're bringing in. And to ensure that you get the most out of your additional dataflow definitions, we increased the number of dataflow runs that you can make in a rolling 24-hour period from 30 to 40. We also refreshed the monitor tab in the data manager to make it easier to track all these dataflows and keep an eye on how many you've run.

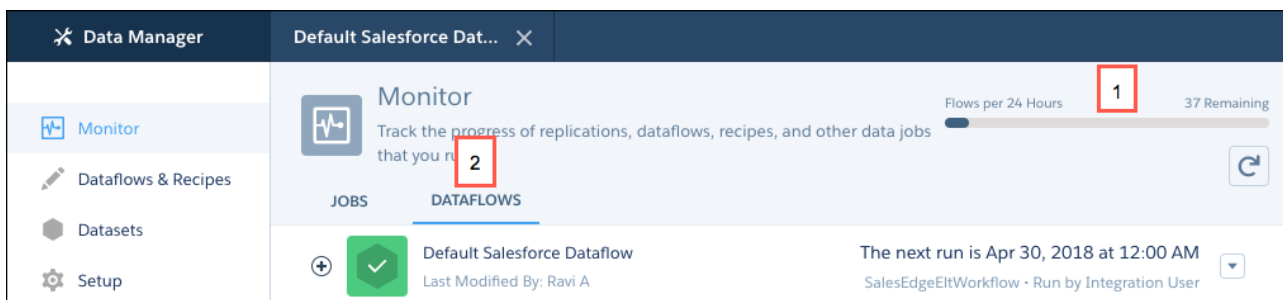
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: You can connect to many different sources of data, from sales and marketing to service and IoT, each with its own specific preparation and scheduling requirements. More dataflows and runs give you finer control of your data preparation. For example, you can create a separate dataflow to prepare data from each source, and schedule it to run whenever fresh data is needed.

How: To create multiple dataflows, you must have replication enabled. On the Dataflows & Recipes tab in the data manager, click **Create Dataflow**.



The increased 24-hour dataflow run limit is available in Analytics with or without replication enabled. To keep track of these dataflow runs, open the Monitor tab in the data manager.



The new flow indicator (1) shows how many dataflows have run in the rolling 24-hour period and how many you have left.

And to help you keep an eye on these dataflows, we replaced the view selector with subtabs (2), so that you can get to them in just a click.

Note: Dataflow and recipe runs that take less than 2 minutes, and replication runs, don't count toward the 24-hour dataflow run limit.

Data out of Shape? Dataflow Append Doesn't Mind

The append transformation used to be unforgiving and would let you append data only if it shared the same schema. Now you can merge datasets with different schemas without blowing up the dataflow. We call this feature disjoint schema append.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To create or edit a dataflow, you must have the Edit Dataset or Manage Analytics permission.

Why: Let's say you want to append your Canada opportunities to your U.S. opportunities.

US Sales

#	Name	Stage	Amount
1	US Opp1	Negotiation	100
2	US Opp2	Quote	200
3	US Opp3	Prospecting	300
4	US Opp4	Needs Analysis	200

Canada Sales

#	Name ▲	Currency	Stage	Value
1	Ca Opp1	CAD	Negotiation	100
2	Ca Opp2	CAD	Quote	200
3	Ca Opp3	CAD	Prospecting	300
4	Ca Opp4	CAD	Needs Analysis	200

Previously, you could append only when each dataset had the same columns. That doesn't bode well for this example. The column names are different, and the Canada data has a Currency column. The result of this type of append would have what we call a disjoint schema, which your dataflow wouldn't like. For the dataflow not to fail, you had to bring the schemas into line. So we added a parameter to the append transformation to merge this type of disjointed data without incident.

How: When you create the append node, select **Allow disjoint schema**. If you're working in the dataflow JSON, add the `enableDisjointedSchemaMerge` parameter and set its value to `true`.

Append Node in Dataflow Editor

Append US & CA Sales: append ✕

ATTRIBUTES OUTPUT FIELDS

Node Name

Sources

Allow disjoint schema


Append Node in Dataflow JSON

```
"Append US & CA Sales": {
  "action": "append",
  "parameters": {
    "enableDisjointedSchemaMerge": true,
    "sources": [
      "Extract US Sales",
      "Extract CA Sales"
    ]
  }
}
```

When you run the dataflow, the data is merged without protest.

#	Name	Currency	Stage	Amount	Value
1	US Opp1	-	Negotiation	100	-
2	US Opp2	-	Quote	200	-
3	US Opp3	-	Prospecting	300	-
4	US Opp4	-	Needs Analysis	200	-
5	Ca Opp1	CAD	Negotiation	-	100
6	Ca Opp2	CAD	Quote	-	200
7	Ca Opp3	CAD	Prospecting	-	300
8	Ca Opp4	CAD	Needs Analysis	-	200

The append transformation adds all columns to the dataset and merges values in columns with the same name, such as Name. It also adds null values in a column for rows that didn't previously have that column. You can see this in the Currency column.

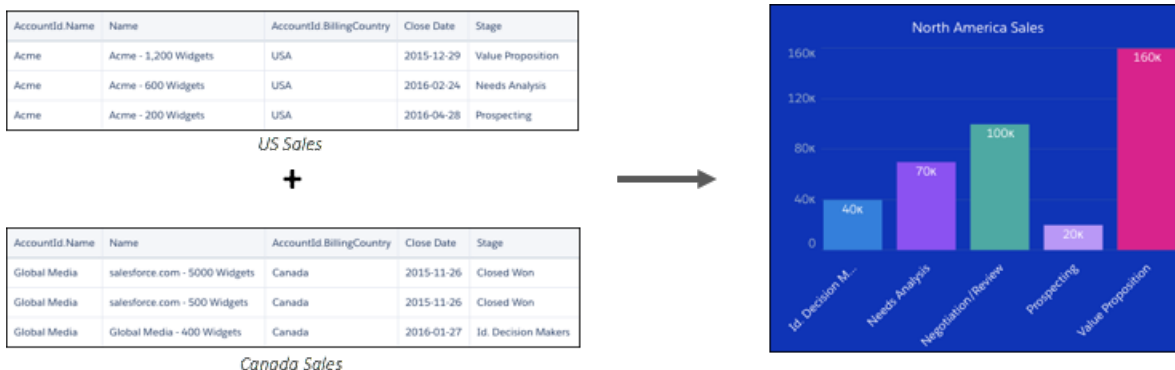
 **Note:** If null measure handling in datasets isn't enabled for your org, append adds zeros in a column for rows that didn't previously have that column.

Append Rows in Dataset Recipes

Quickly add in rows from different datasets in a recipe. Choose the data that you want to combine, review the field mappings (which we do for you), and you're done. Use append to combine related records from different sources, such as remote Salesforce orgs, or to add new rows to fast-changing datasets, such as logs and sensor data.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Some rows belong together, but end up apart. Imagine an international company using separate Salesforce orgs in each region. You could use connectors to replicate opportunities from each org, and then use append in a recipe to combine these rows into a single global sales dataset.



You can already combine rows in a dataflow with the append transformation. But appending in a recipe means that you can preview the data before you combine it. What's more, because we use smart matching to map the fields for you, you save time, and your data ends up in the correct columns.

Map fields to append

FIELD IN RECIPE	FIELD TO APPEND (8 Rows)	SAMPLE APPEND VALUE
AccountId.Name	AccountId.Name	Global Media
Account ID	Account ID	001RM000003WnRnYAK
AccountId.BillingCountry	AccountId.BillingCountry	Canada

And if we don't get it quite right, you can match the fields yourself. Useful if your field names aren't exactly the same or in the same language

How: Append is up and ready to go whenever you're working on a recipe. Just look for the Append Data button.

Data Manager North America Sales

DATASET RECIPE North America Sales: 8 rows appended Recipe Preview for 15/15 Fields, ...

Append Data

APPEND	AccountId.Name	Account ID	Acc	Append Data	OwnerId.Name	Stage
Append 8 rows from 'Opportunities'	Global Media	001RM000003WnRnYAK	Canada		Admin User	Closed Won
	Global Media	001RM000003WnRnYAK	Canada		Admin User	Closed Won

Select the dataset or replicated dataset with the rows that you want to add, review your field mappings, and away you go.

Note: Rows that you append in a recipe do not appear in the recipe preview, but are added to the target dataset when you run the recipe.

Use Multi-Select Fields for Faster Formulas in Recipes

Building a formula from multiple fields in a recipe just got easier. Select the fields in the preview, choose a suggested function, and look on in awe as Analytics populates the formula for you.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Building a formula can take time, especially if it includes multiple fields. The formula builder does a pretty good job of suggesting fields as you type, but even this can be hard work if you have lots of measure fields in the recipe.

exp	function
[Number_of_children]	field
ceil	function
power	function
[Opportunity_Score]	field
e	

That's where multi-selecting comes in. Selecting the fields straight from the recipe preview means less time typing and more time working on the fun part: functions and operators.

How: For example, you're using a recipe to append opportunities from a remote Canadian org to your local U.S. opportunities. To ensure that all amounts are in U.S. dollars, you added an exchange rate column and are now ready to use a formula to do the currency conversion.

The screenshot displays the 'Dataset Recipe' for 'Global Sales' with 41/67 fields and 676 rows. The table contains the following data:

CloseDate	Opportunity Na...	Opportunity Cur...	Amount	USD Exchange R...
2018-04-09	Opportunity for Conner5	CAD	32400	1.29
2016-12-21	Opportunity for McDona...	USD	240747	1
2018-02-05	Opportunity for Barnes1...	CAD	363400	1.29
2017-07-14	Opportunity for Murphy...	USD	2664105	1
2017-01-09	Opportunity for Banks277	CAD	376862	1.29
2017-08-08	Opportunity for Alexand...	CAD	18960	1.29
2017-06-19	Opportunity for Watson3...	USD	117480	1
2018-06-13	Opportunity for Wise361	USD	1595250	1
2018-02-28	Opportunity for Scott363	USD	788800	1
2017-03-06	Opportunity for Rios369	USD	112725	1
2017-11-21	Opportunity for Gordon...	CAD	179225	1.29
2017-09-30	Opportunity for Harringt...	USD	22240	1
2017-11-14	Opportunity for Pearson...	USD	62400	1
2018-01-30	Opportunity for Hawkins...	CAD	136464	1.29

To include the Amount and USD Exchange Rate fields in your formula, while pressing the Shift, Ctrl (Windows), or Cmd (Mac OS) key, click the columns in the preview (1). You can also click fields in the NAVIGATOR tab of the column profile panel (2). Then click a suggested function in the suggestions bar (3). Your selected fields appear in the formula builder.

The 'Add Transformation' dialog shows the formula builder with the following content:

Formula: `[Amount]*[[USD_FOR.Rate]]`

Buttons: Add

Einstein Suggestions: Logarithm, Power, Square Root

Your formula might still need some work, but at least that doesn't involve looking for fields!

Tip: Select the columns in the order that you want the fields to appear in the formula builder.

When you add the formula, the result appears in a new column in the recipe preview. You can change the field label on the ATTRIBUTES tab of the profile panel.

Opportunity Na...	Opportunity Cur...	Amount	USD Exchange R...	USD Amount
Opportunity for Conner5	CAD	32400	1.29	41796
Opportunity for McDona...	USD	240747	1	240747
Opportunity for Barnes1...	CAD	363400	1.29	468786
Opportunity for Murphy...	USD	2664105	1	2664105
Opportunity for Banks277	CAD	376862	1.29	486151.98
Opportunity for Alexand...	CAD	18960	1.29	24458.4
Opportunity for Watson3...	USD	117480	1	117480
Opportunity for Wise361	USD	1595250	1	1595250
Opportunity for Scott363	USD	788800	1	788800
Opportunity for Rios369	USD	112725	1	112725
Opportunity for Gordon...	CAD	179225	1.29	231200.25
Opportunity for Harringt...	USD	22240	1	22240

USD Amount

PROFILE ATTRIBUTES NAVIGATOR

API Name

formula

Field Label

USD Amount

Field Type

Measure

Inherit More of Your Salesforce Sharing Settings in Einstein Analytics

Improvements to sharing inheritance make administration easier. Support for inheriting sharing rules now includes the contact and lead objects. The number of records that a user can see from a source object has increased to 3,000 records.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To enable or disable sharing inheritance, a user must have the Manage Analytics user permission. To configure sharing inheritance on a dataset or dataflow, a user must have the Edit Analytics Dataflows or Edit Dataset Recipes user permission.

How: Sharing inheritance is now turned on by default in new orgs. To enable sharing inheritance in an existing org, from Setup, in the Quick Find box, enter *Analytics*, and then select **Settings**. Select **Inherit sharing from Salesforce**, and click **Save**.

Analytics Prebuilt Apps: Brand-New Analytics Templates, Account-Based Marketing for B2B Marketing Analytics

Prebuilt Analytics apps now include a range of Analytics Templates to help you accelerate time-to-success with the Analytics platform. There's also a new version of the B2B Marketing app that lets you analyze campaign performance by account.

IN THIS SECTION:

[Take the Fast Path to Business Intelligence with New Templates](#)

Choose from a wide range of new templates to instantly create prebuilt solutions based on the Analytics platform. Meet your data analytics needs fast without having to deal with the complexities of integrating data or building dashboards.

[Health Cloud Analytics Template Lets Health Cloud Customers Get Started with Einstein Analytics—Fast](#)

Use the Health Cloud Analytics template to create an app that helps healthcare coordinators identify high-risk patients.

[The Social Case Analytics Template Brings the Power of Analytics to Your Social Customer Service Data](#)

Create an app from the Social Case Analytics template to give service managers a fast way to get started analyzing team performance through Facebook, Twitter, and other social channels.

[Bring Your Financial Services Cloud Data to Life With the Financial Advisor Analytics Template.](#)

Financial Service Cloud customers: Get instant Einstein Analytics visualizations by creating an app using the Financial Advisory Analytics Template.

[The Campaign Analytics Template Brings the Power of Einstein Analytics to Marketing Campaign Data](#)

Create an app from the Campaign Analytics Template to get immediate insight into the impact of your campaigns.

[Analyze Field History Data in any Salesforce Object with the Change Analytics Template](#)

Get the 411 instantly about what your team's doing with Salesforce objects—how, when, and where they're making changes.

[Get Instant Insights About Your Team's Quoting Process with the Quoting Analytics Template](#)

Quoting Analytics digs deep into your configure-price-quote (CPQ) process and its effectiveness across teams, regions, and products.

[Quickly Trend Any Data in Salesforce with the Snapshot Analytics App](#)

Create the app to snapshot any existing Einstein Analytics dataset or Salesforce object.

[Maximize Your Analytics Investment with Insights from the Adoption Analytics App](#)

The app provides a prebuilt dashboard and datasets to help you measure and monitor Analytics adoption.

[Nonprofits: Now There's an Analytics App Just for You and Your Data](#)

The Fundraising Analytics app brings the power of Analytics to data from the Salesforce Nonprofit Success Pack.

[Analytics Adoption AppExchange Package Lets You See How Your Team Uses Einstein Analytics](#)

Create a dataset that gives you meaningful insight into your team's use of Analytics apps, dashboards, lenses, and datasets. You can base your own visualizations on the dataset or use the Adoption Analytics app, which requires you to install the package for successful app creation.

[Identify and Track Top Accounts in B2B Marketing Analytics](#)

With the new account-based marketing dashboard and datasets for B2B Marketing Analytics, you can analyze campaign performance, influence, channel activity, and more, all by account. The new tools help answer questions about accounts, and let you identify highly engaged, top-revenue accounts to focus on. Segment and customize this data using B2B Marketing Analytics.

Take the Fast Path to Business Intelligence with New Templates

Choose from a wide range of new templates to instantly create prebuilt solutions based on the Analytics platform. Meet your data analytics needs fast without having to deal with the complexities of integrating data or building dashboards.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use Analytics templates, you must have an Analytics Platform license.

Why: Want to get going fast on the Analytics platform? New Analytics Templates let you do that with ready-made datasets and dashboards that you can easily customize around your own requirements. We're introducing new templates that address a wide variety of industry and line-of-business use cases.

No more starting from a blank slate, and you don't have to deal with the complexities of data modeling or build visualizations to get going. Create an app from a template, and Analytics imports Salesforce data into Analytics datasets and dashboards. From there, add data and build your own explorations. Customize the dashboards to meet your needs, add your own, and delete anything you can't use. Think of them as starter packs for your organization's analytics experience.

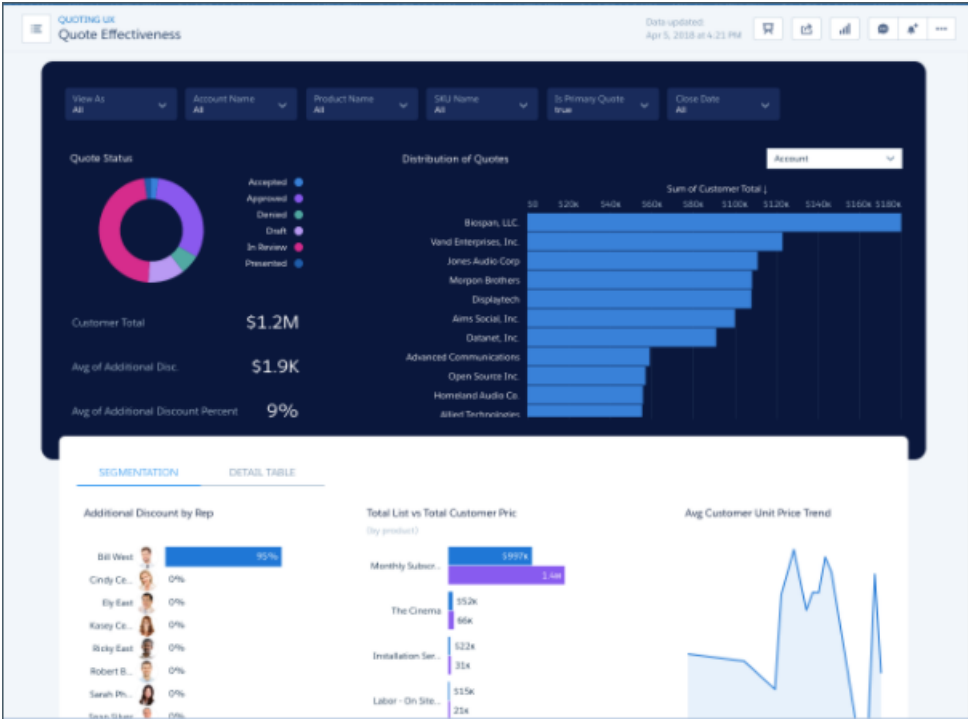
Analytics Templates give you *just* what you want and *only* what you want. Each template includes a selection of datasets and dashboards to meet your immediate analytics needs. Nonprofits, for example, can get started fast with the Fundraising Analytics pack, with dashboards focused on helping you stay on top of donors and donations. Or, if businesses want insight into their configure-price-quote (CPQ) processes, they can use the Quoting Analytics template.

Choose from the following template categories:

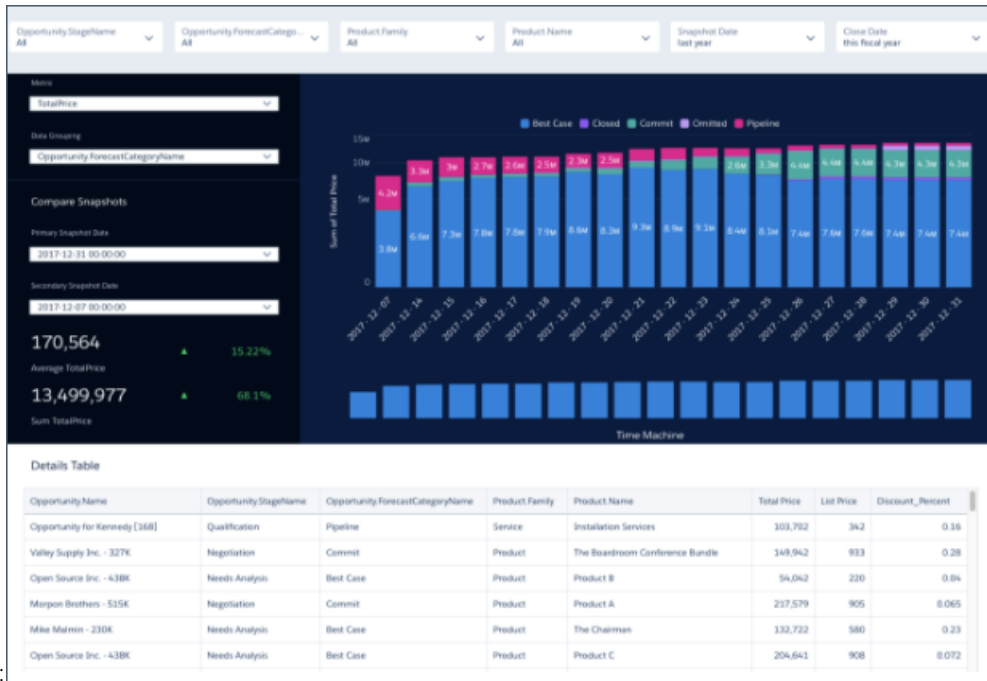
- Industry templates for financial services, health, nonprofit, retail, and other sectors.
- Line-of-business templates for quoting, marketing, and other business processes.
- Feature-specific templates that help you take data snapshots, create specialized charts, analyze change in your Salesforce org, and take advantage of other Analytics features.

The first new templates include the following:

- Quoting Analytics.** Gives you instant insight into your team's configure-price-quote (CPQ) process. You can dig deep into the process and its effectiveness across teams, regions, and products. Here's the Quote Effectiveness dashboard:



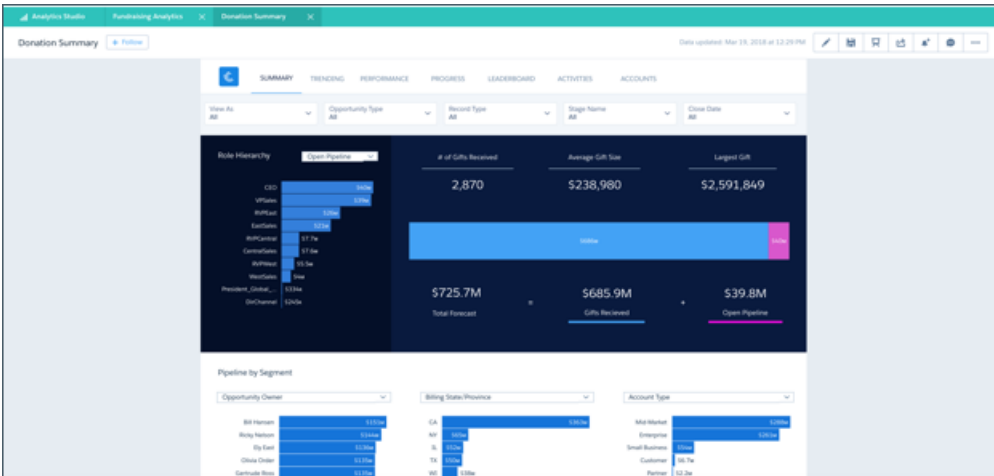
- Snapshot Analytics.** Use this template to create a custom dashboard to provide a visual report based on historical data from any Salesforce object or dataset. Here's an example



snapshot:

- Change Analytics.** Analyze field history data in any Salesforce object with this template to see how, when, and where members of your team change data.

- **Adoption Analytics.** This template creates datasets and dashboard to help you understand your team's adoption of Analytics assets—datasets, dashboards, and apps.
- **Fundraising Analytics.** Non-profits: Use this template to apply the power of Einstein Analytics to Salesforce nonprofit Data. KPIs in the dashboards focus on donors and donations. Here's the Donation Summary dashboard:



- **Pipeline Analytics.** Point this template at your Salesforce data to instantly create a cool waterfall dashboard showing sales pipeline by product, team, or geography.

The new templates broaden the offering we started with the Sales Analytics, Service Analytics, Field Service Analytics, Event Monitoring Analytics, and other app templates. We plan to release new templates regularly over the coming months and releases to serve a wide variety of new business analytics needs.

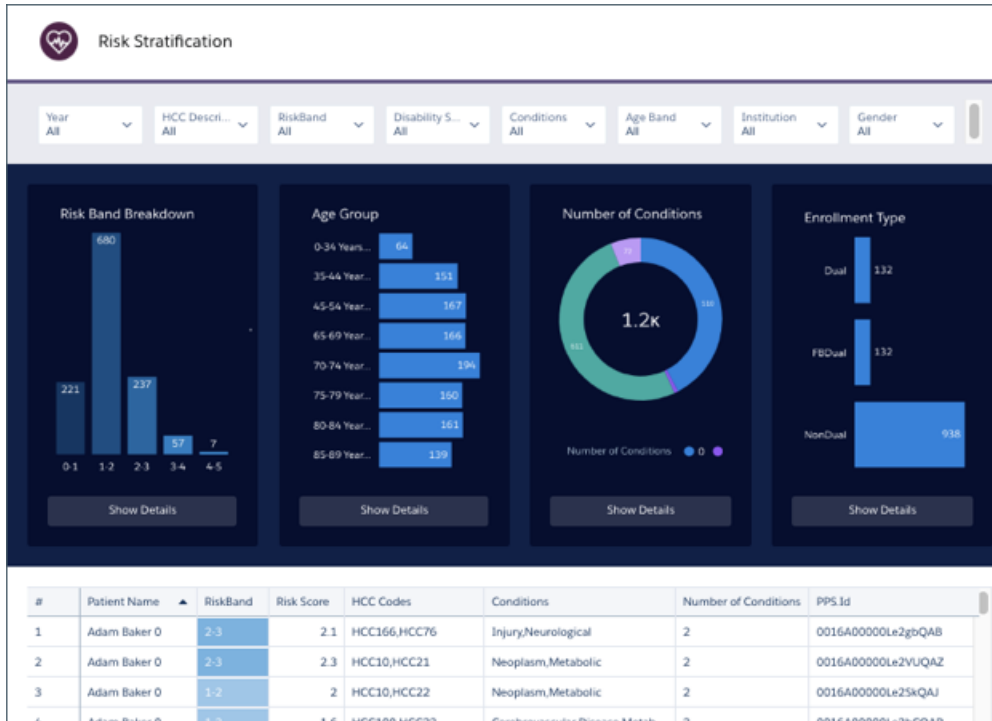
How: Create an app in Analytics Studio as you've always done, and look for templates in the left panel of the Create window. Scroll down to see them all and select the one you want.

After Analytics builds the app, open it on the Analytics Studio home page and start exploring. Salesforce Help provides details about what's in each Analytics Template and guides you to common customizations you can try.

Get started with Analytics Starter Packs today and move from data to actionable insights in minutes.

Health Cloud Analytics Template Lets Health Cloud Customers Get Started with Einstein Analytics—Fast

Use the Health Cloud Analytics template to create an app that helps healthcare coordinators identify high-risk patients.



Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use the Health Cloud Analytics app, you must have an Analytics Platform license.

Why: Health Cloud customers: use the Health Cloud Analytics app to quickly assemble a report listing high-risk patients. Then share the report with your organization to deliver the right level of care management to those patients.

With the Patient Care Risk Stratification dashboard, you can drill in to specific population segments. View risk score, age, number of conditions, and enrollment type for each segment. Based on those metrics, identify risk for your patients and plan the appropriate level of care to assure the best treatment outcomes.

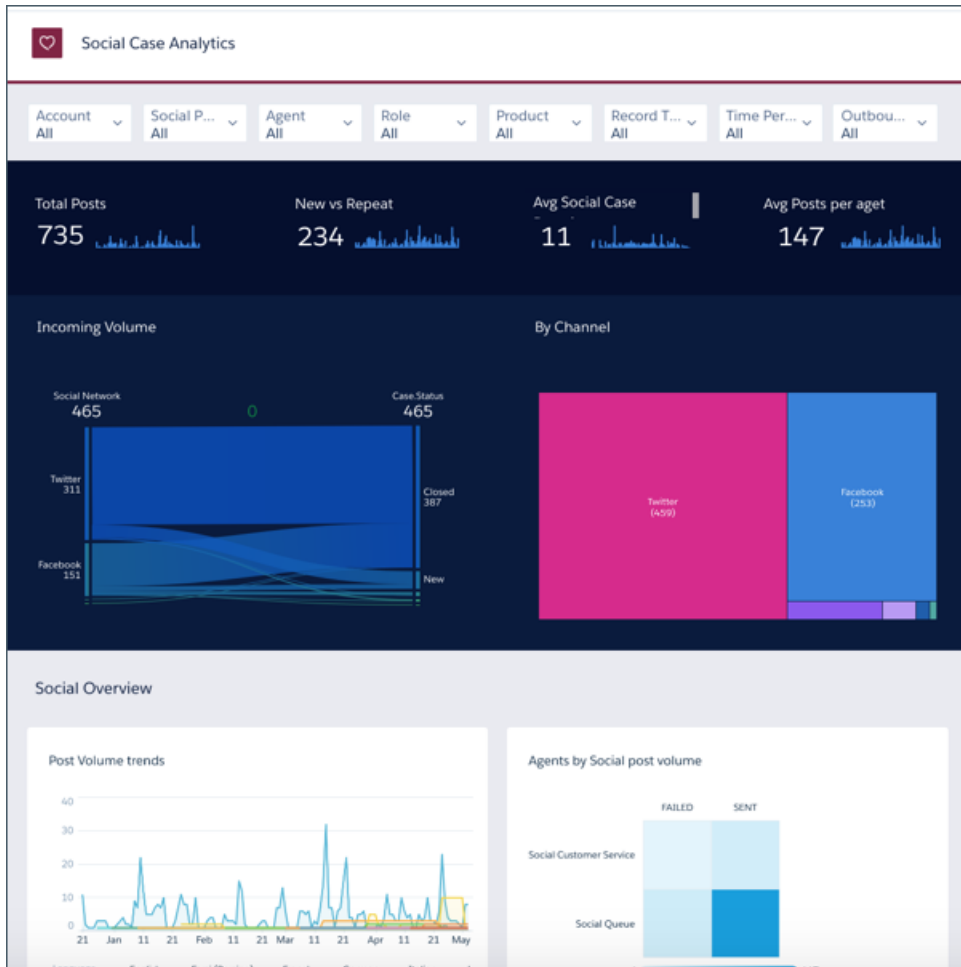
How: Create the app just like you would any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click **Create**, and select the Health Cloud Analytics template. Be sure to schedule the dataflow and share the app, as well. Health Cloud Analytics is only for Health Cloud customers who have installed the Health Cloud Risk Stratification package. Complete instructions can be found in Salesforce Help.

The Social Case Analytics Template Brings the Power of Analytics to Your Social Customer Service Data

Create an app from the Social Case Analytics template to give service managers a fast way to get started analyzing team performance through Facebook, Twitter, and other social channels.

Where: This feature applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available for an extra cost in Enterprise, Performance, and Unlimited Editions, and it's also available in Developer Edition.

Who: To use the Social Case Analytics Template, you must have an Analytics Platform license.



Why: Need a way to stay on top or how your service teams use social channels to manage cases? The Social Case Analytics app lets you do that with ready-made visualizations based on your Service Cloud data. The dashboard creates a picture of your social channel service data to help you:

- Plan capacity by showing historical volumes and handle times.
- Lower cost-per-case and improve productivity by tracking per-case post volume.
- Identify agents who need coaching by analyzing your team's time-to-close and response times.
- Stay on top of social post volume and trends by language, geography, and handle.

Don't see what you need in the dashboard? Customize it around your business and analytics needs. Or create your own explorations based on the app's curated datasets.

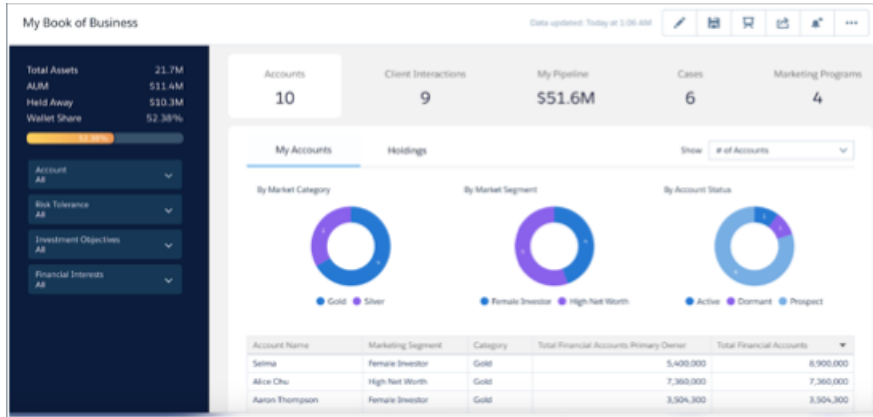
How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Social Case Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in [Salesforce Help](#).

Bring Your Financial Services Cloud Data to Life With the Financial Advisor Analytics Template.

Financial Service Cloud customers: Get instant Einstein Analytics visualizations by creating an app using the Financial Advisory Analytics Template.

Where: This feature applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available for an extra cost in Enterprise, Performance, and Unlimited Editions, and it's also available in Developer Edition.

Who: To use Analytics Templates, you must have an Analytics Platform license. To use the Financial Advisor Analytics Template, you must have installed the Financial Service Cloud package.



Why: Get started fast analyzing the success of your financial services business with Financial Advisor Analytics. Financial advisors get actionable insights to grow their business by helping deepen client relationships and increase assets under management (AUM). Dig deep into data about all your client interactions so you can your next steps with current client goals. Its KPIs also help you engage the right new clients through the right channels. And quickly segment customers to provide every client personalized service.

Don't see what you need in the app's My Book of Business dashboard? Quickly customize its dashboard to reflect your own requirements. Or create your own unique explorations based on the app's datasets.

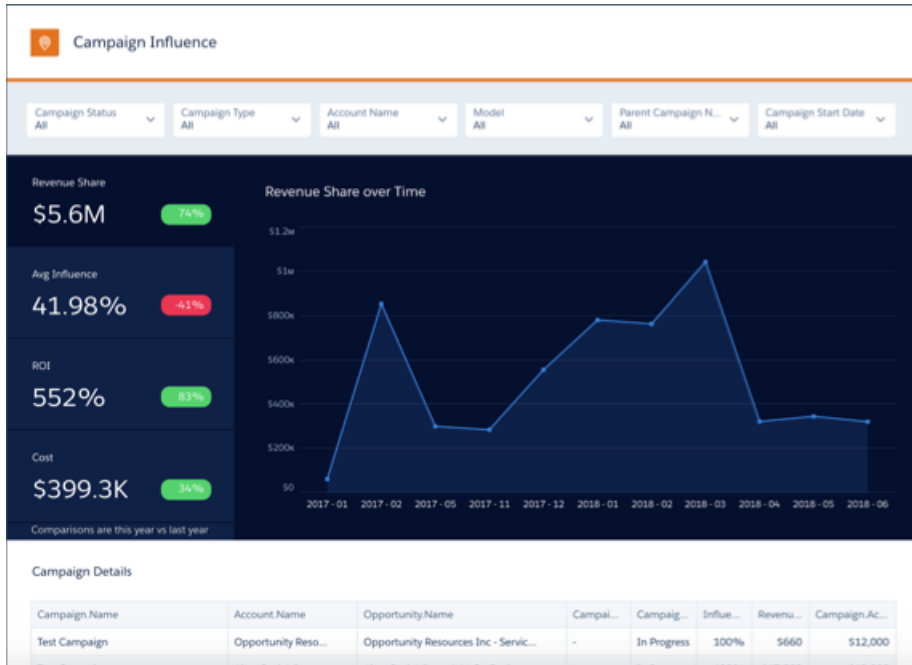
How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Financial Advisor Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

The Campaign Analytics Template Brings the Power of Einstein Analytics to Marketing Campaign Data

Create an app from the Campaign Analytics Template to get immediate insight into the impact of your campaigns.

Where: This feature applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available for an extra cost in Enterprise, Performance, and Unlimited Editions, and it's also available in Developer Edition.

Who: To use Analytics Templates, you must have an Analytics Platform license.



Why: Need to understand how your marketing campaigns impact the bottom line? Use the Campaign Analytics template to create an app that shows how campaigns translate to revenue. Its Campaign Influence dashboard paints a picture of how your campaigns help to drive business, using Salesforce campaign data.

You get actionable insight into the return-on-investment of your marketing spend.

- Compare performance over time.
- Drill into your regional top performers
- Highlight successful campaigns.
- Review channels to see which ones are most effective.

Use insights from the app to be reallocate marketing dollars to where they can have the most impact.

Don't see what you need in the app? Quickly customize its dashboard to reflect your own requirements. Or create your own unique explorations based on the app's datasets.

How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Campaign Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Analyze Field History Data in any Salesforce Object with the Change Analytics Template

Get the 411 instantly about what your team's doing with Salesforce objects—how, when, and where they're making changes.

Where: This feature applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available for an extra cost in Enterprise, Performance, and Unlimited Editions, and it's also available in Developer Edition.

Who: To use the Change Analytics Template, you must have an Analytics Platform license.



Why: Put Change Analytics to work out of the box on data from any Salesforce object that uses field history to gain valuable insights about how your team uses an object. Or customize it to meet your exacting specifications.

The app's dashboard shows which fields change the most, the most common ways fields change, duration between changes, and other key change metrics for the selected object. Customize the dashboard to behave the way you want it to or to add KPIs. Or open the app's dataset to create your own explorations—for example visualizing change trends using a Sankey diagram—and save them into your own dashboards.

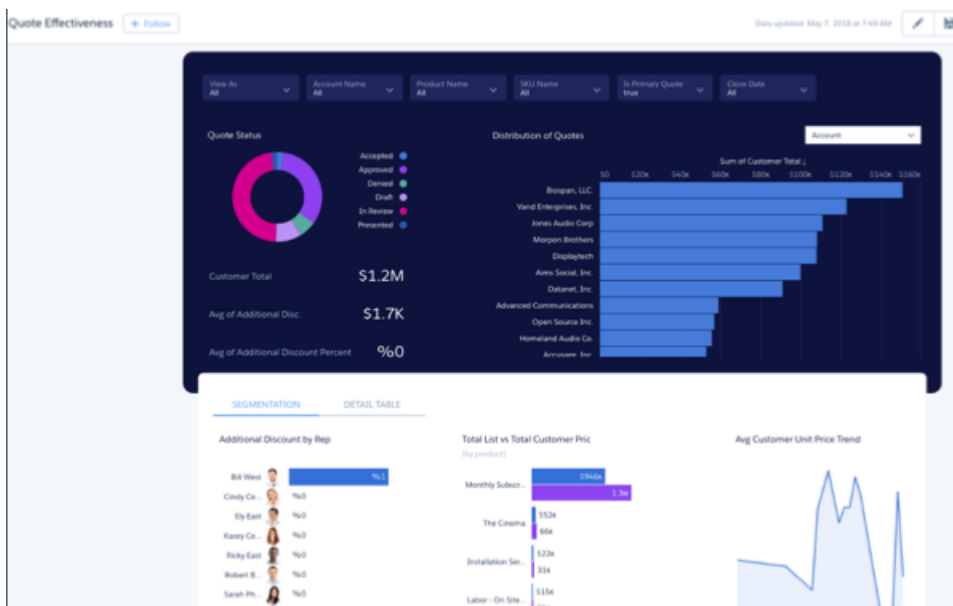
How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Change Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Get Instant Insights About Your Team's Quoting Process with the Quoting Analytics Template

Quoting Analytics digs deep into your configure-price-quote (CPQ) process and its effectiveness across teams, regions, and products.

Where: This feature applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available for an extra cost in Enterprise, Performance, and Unlimited Editions, and it's also available in Developer Edition.

Who: To use Analytics Templates, you must have an Analytics Platform license.



Why: With apps created from the Quoting Analytics template, you can help your team spend more time selling and closing deals and less time analyzing their CPQ processes. The Quoting Analytics template lets you create an app fast with dashboards that paint a picture

of your team’s quoting and discounting processes. The app helps you improve quote processes, control pricing, and close deals faster by letting you:

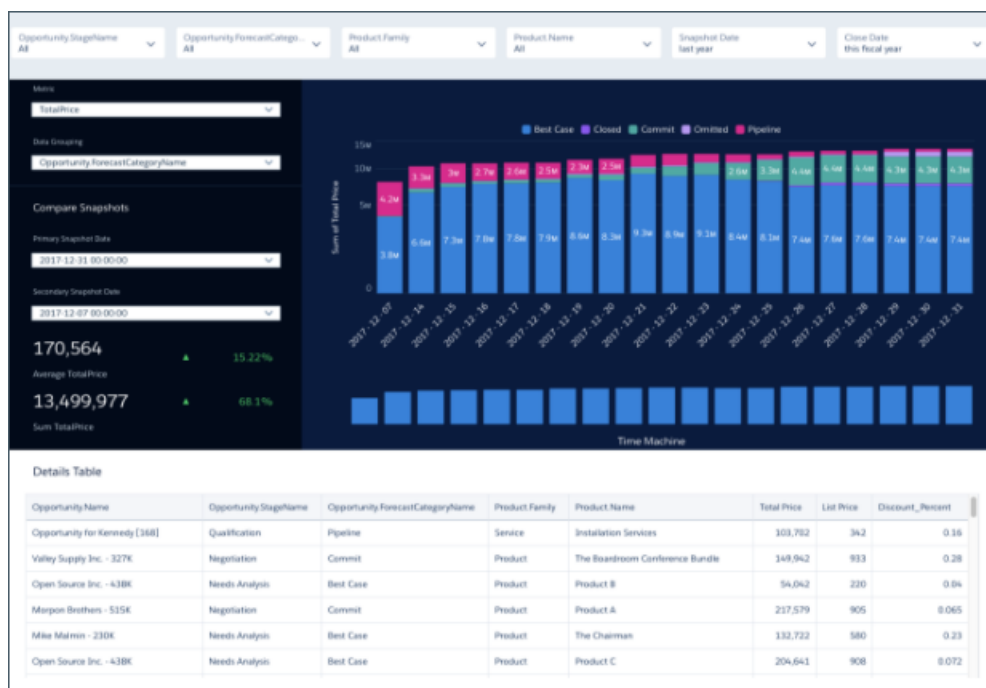
- View quotes across all your accounts.
- Uncover bottlenecks in the team’s processes.
- Measure each rep’s quoting effectiveness.
- Assess discount practices for the whole team or each rep.

You can customize its dashboard to meet your team's unique requirements. Or quickly create your own explorations using the app's datasets and save them to your own dashboards.

How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Quoting Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Quickly Trend Any Data in Salesforce with the Snapshot Analytics App

Create the app to snapshot any existing Einstein Analytics dataset or Salesforce object.



Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use the Snapshot Analytics app, you must have an Analytics Platform license.

Why: Snapshot Analytics simplifies trending your Salesforce data. Before, you had to create a dataset, then trend its data and create a dashboard. Snapshot Analytics makes that process faster, easier, and virtually automatic.

When you create the app, you can target an existing Analytics dataset. Or select a Salesforce object and Analytics imports its data into a dataset. With either option, Analytics automatically creates a dashboard with a snapshot of your data. The dashboard is modeled after Salesforce trend report types, and you can go down two levels of grain since you choose parent, child, and grandchild objects.

How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Snapshot Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Maximize Your Analytics Investment with Insights from the Adoption Analytics App

The app provides a prebuilt dashboard and datasets to help you measure and monitor Analytics adoption.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use the Adoption Analytics app, you must have an Analytics Platform license.

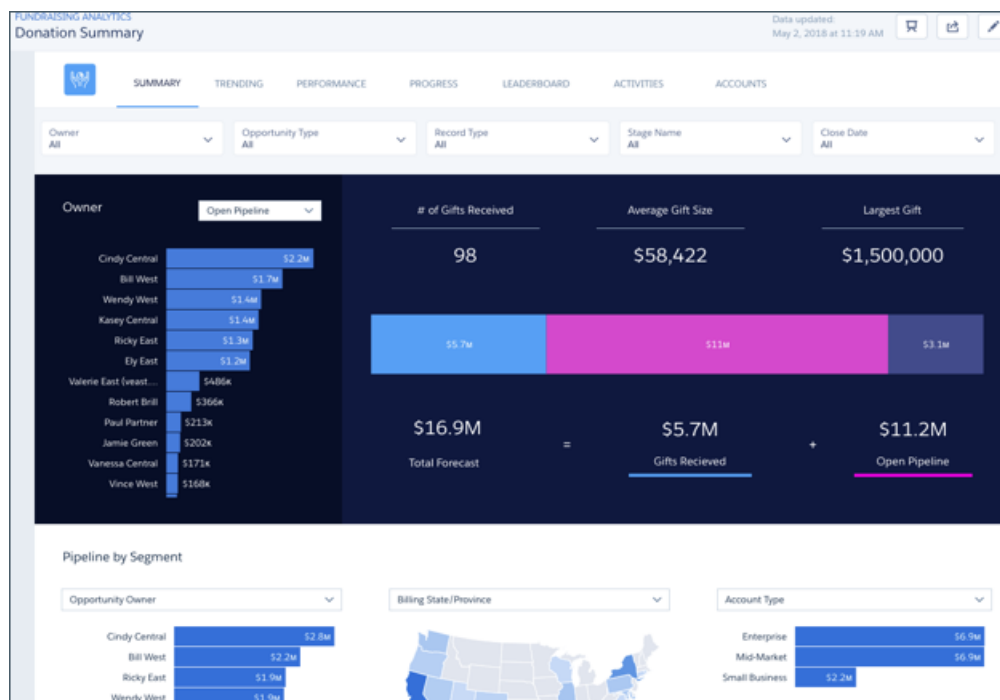
Why: Use the app's prebuilt dashboards to analyze the popularity of Analytics assets, including apps, dashboards, lenses, and datasets. See who's making the most use of each asset and identify unused assets and users who aren't using Analytics. With the help of Analytics adoption metrics, you can drive Analytics usage and identify usability enhancements for Analytics assets. You can also provide necessary training for users and build meaningful new content for targeted user groups.

You can also customize the app to meet your specific requirements to understand Analytics adoption by your team. Create your own explorations using the app's datasets and save them into dashboards that answer the questions you have about use of Analytics assets. Or edit the existing dashboards to do just what you want them to do.

How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Adoption Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Nonprofits: Now There's an Analytics App Just for You and Your Data

The Fundraising Analytics app brings the power of Analytics to data from the Salesforce Nonprofit Success Pack.



Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use the Fundraising Analytics app, you must have an Analytics Platform license.

Why: Fundraising Analytics gives you a fast way to get started analyzing the success of your fundraising with Einstein Analytics. Optimized for organizations who use the Salesforce Nonprofit Success Pack, the app brings data from your Account/Person Account and Donation into Analytics.

Visualize your donation performance out-of-the-box with its prebuilt dashboards. Or create your own explorations using the apps' datasets and save them into dashboards that answer the questions you have about donations. Or edit the existing dashboards to do just what you want them to do.

How: Create the app just like you have any other Analytics prebuilt app, such as Sales Analytics and Service Analytics. Go to Analytics Studio, click Create, and look for the Fundraising Analytics template. Be sure to schedule the dataflow and share the app, as well. Complete instructions can be found in Salesforce Help.

Analytics Adoption AppExchange Package Lets You See How Your Team Uses Einstein Analytics

Create a dataset that gives you meaningful insight into your team's use of Analytics apps, dashboards, lenses, and datasets. You can base your own visualizations on the dataset or use the Adoption Analytics app, which requires you to install the package for successful app creation.

Where: This feature is available in Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To use the Analytics Adoption Metadata Package, you must have an Analytics Platform license.

Why: You've built some great apps using Analytics Studio and shared them with your team. Or maybe you've just created a dataset and a couple of dashboards and lenses. Now you want to see how the team uses all those assets so you can understand how they're adopting your solution. The Analytics Adoption Metadata Package, available on AppExchange, lets you do that.

When you create an Analytics app, dataset, dashboard, or lens, the Analytics platform assigns each a numerical ID. You enter a name for the asset that's meaningful to you and your team. For compliance reasons, Salesforce event log lines can't store data input by users, including those meaningful names.

The package creates a dataset that maps the cryptic numerical asset IDs to the names you give them. Without the dataset, your visualizations would show only hard-to-decipher asset ID numbers. Once you create the dataset, Salesforce refreshes it every day with any changes or additions you've made.

How: Download the Analytics Adoption Metadata Package from the Salesforce AppExchange. Follow the instructions included with the package to install and set up the package and the dataset. Then open the dataset in Analytics Studio and create visualizations showing Analytics adoption patterns in your org.

The package doesn't create any lenses or dashboards. The Adoption Analytics app includes a dashboard based on the dataset created by the adoption package. Before using the Adoption Analytics app, you have to install the adoption package.

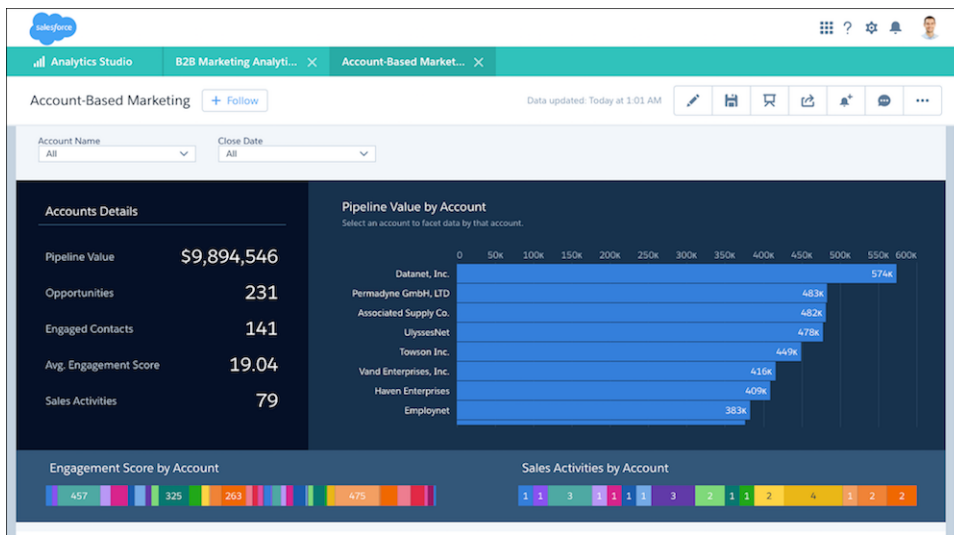
Identify and Track Top Accounts in B2B Marketing Analytics

With the new account-based marketing dashboard and datasets for B2B Marketing Analytics, you can analyze campaign performance, influence, channel activity, and more, all by account. The new tools help answer questions about accounts, and let you identify highly engaged, top-revenue accounts to focus on. Segment and customize this data using B2B Marketing Analytics.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions with Pardot Pro or Ultimate edition and B2B Marketing Analytics.

Who: This feature is available to users with a B2B Marketing Analytics license.

Why: The account-based marketing dashboard is provisioned to the B2B Marketing Analytics app and combines sales and marketing data in one place. Measure your ABM campaign success, and track specific accounts as they move through the sales funnel.




Dashboard visualizations include:

- Account Details—See top-level Account KPIs.
- Pipeline Value by Account—View top accounts in your pipeline by value.
- Engagement Score by Account—Identify top-engaging accounts.
- Sales Activities by Account—Identify which accounts your sales teams are engaged with.
- Opportunities—See your pipeline and opportunities within accounts and understand your win percentage.
- Engagement (Campaign Influence by Account and Revenue Share by Account and Lead Source)—See how accounts are engaging with your marketing activities.

These new datasets are provisioned to the Analytics Shared App.

- Salesforce Contacts with Accounts—Contacts associated with accounts, including sales activities, contact information, lead source, and Pardot grade and score. This data comes from Salesforce and Pardot.
- Salesforce Opportunities with Account—Opportunities associated with accounts, including close date and related information, opportunity value, and account detail information. This data comes from Salesforce.
- Salesforce Events with Contact, User, and Account—Events associated to the contact, user and account, including number and duration of events, activity information, and other event-related data. This data comes from Salesforce.

How: The new datasets and dashboard are automatically provisioned to the designated apps in Analytics Studio. To move these datasets from the Shared App to the B2B Marketing Analytics app, edit the datasets. Then choose B2B Marketing Analytics as the app associated to the dataset.

 **Note:** Replication must be enabled in Analytics for these enhancements to be provisioned to your account.

Analytics Mobile Apps: Chart Variety, Beautiful Tables

Take Analytics on the go more easily with both iOS and Android devices. With the last releases, many new chart types are supported, as well as customized formatting for tables. In addition to a variety of other enhancements, you'll see new exploration capabilities for both iOS and Android.

IN THIS SECTION:

[Experience Your Favorite Charts and Tables on Einstein Analytics for iOS and Android](#)

Support for almost every chart and table that you can create on desktop makes getting data insights on mobile more straightforward.

[Additional Enhancements in Einstein Analytics for iOS](#)

Get the new exploration experience, track notifications, access saved dashboard views, and more.

[Additional Enhancements in Einstein Analytics for Android](#)

Explore charts, access saved dashboard views, adjust global dashboard filters.

Experience Your Favorite Charts and Tables on Einstein Analytics for iOS and Android

Support for almost every chart and table that you can create on desktop makes getting data insights on mobile more straightforward.

Where: These changes apply to Einstein Analytics for iOS and Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited Editions.

Why: Enhancements in the latest releases include the following features.

- Experience rich tables with support for themes, custom spacing, header and cell styling, borders, colors, and column-specific customizations.
- View customized tooltips that give context to your dashboard images. When an image has a tooltip, just tapping the image reveals the text.
- Easily use Analytics on the go with the familiar charts you know and love. Here are the currently supported charts for dashboards and lenses on mobile.
 - Bar
 - Column
 - Stacked Bar
 - Stacked Column
 - Scatter Plot
 - Donut
 - Heat Map
 - Line
 - Horizontal/Vertical Dot Plot
 - Timeline
 - Time Bar
 - Time Combo
 - Waterfall
 - Stacked Waterfall
 - Combo (Bar and Line)
 - Funnel
 - Metrics Radar
 - Map
 - Bubble Map
 - Custom Map (iOS only)
 - Pyramid

- Polar Gauge
- Flat Gauge
- Matrix
- Tree Map
- Values Table
- Compare Table (without summary rows)

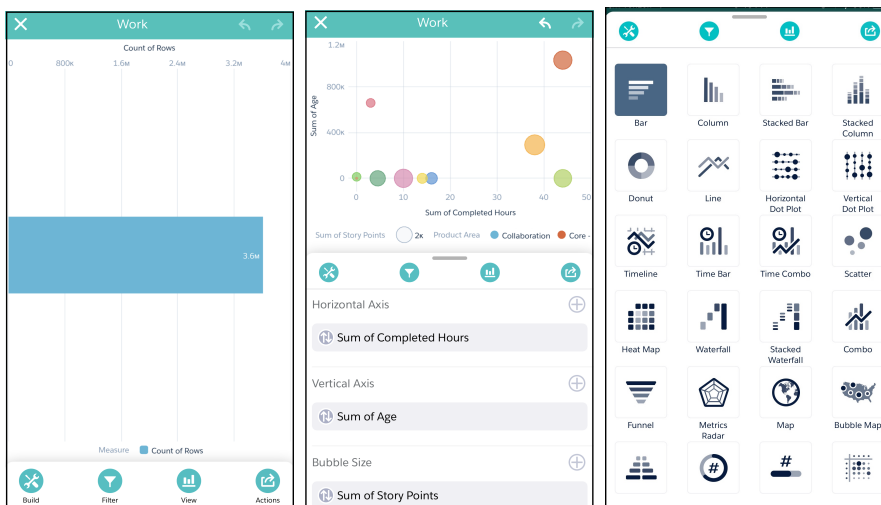
Additional Enhancements in Einstein Analytics for iOS

Get the new exploration experience, track notifications, access saved dashboard views, and more.

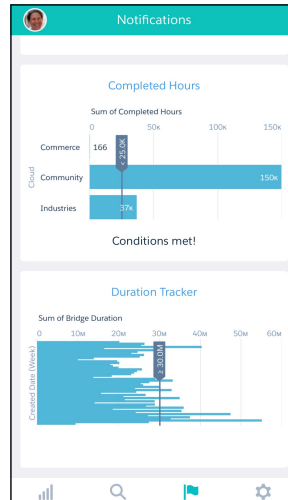
Where: These changes apply to Einstein Analytics for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Enhancements in the latest releases include the following features.

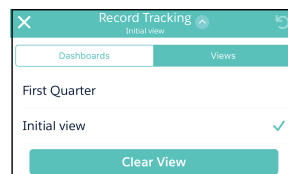
- More easily create meaningful visualizations of your data with the new exploration experience that matches desktop Analytics. When you open a dataset or lens, Build, Filter, Views, and save/share Actions icons appear in the lower screen. Build opens the panel where you add measures and groups. Expand the exploration work area to full or half screen for easy access.



- Track your most important business metrics in the Notifications section. Open the notifications tracking screen by tapping . When you set notifications in Analytics on desktop, the tiles for tracking progress appear here. Tap a tile to go directly to the dashboard that contains the notification.



- Access and share dashboard views with all your specific filters and selections already applied. When a dashboard has saved views, the dropdown next to the dashboard name includes a toggle to access both the saved views and the other assets in the app.



- View your own geographical data in custom maps, now supported in Einstein Analytics for iOS.
- Einstein Analytics no longer has a standalone app for your wrist. We've removed the Analytics Apple Watch app, so that we can focus on making the iPhone and iPad experiences more enjoyable for our users.
- Einstein Analytics is optimized for iPhone X.

How: Analytics is available for devices running iOS 10 and later. For the latest enhancements, download Einstein Analytics from the App Store.

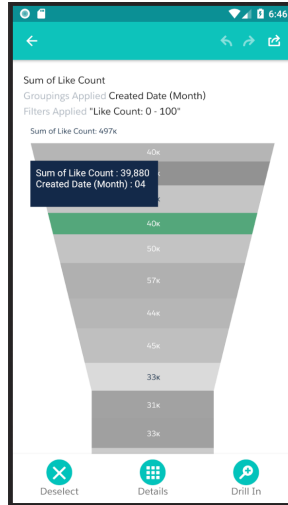
Additional Enhancements in Einstein Analytics for Android

Explore charts, access saved dashboard views, adjust global dashboard filters.

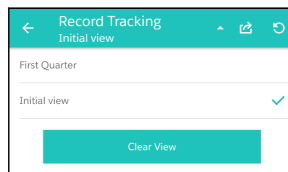
Where: These changes apply to Einstein Analytics for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited Editions.

Why: Enhancements in the latest releases include the following features.

- Explore charts with Drill In and Details actions. Double-tap a chart on a dashboard, or open a lens. Then tap an element of the chart to select it. The Details icon in the lower screen shows you the data behind your selection. The Drill In icon lets you explore that data further.



- Access and share your filtered dashboard views. When a dashboard has more than one saved view, you can tap the down-arrow next to a dashboard’s name to select other views.



- Take charge of dashboard filters with the Global Filters widget. When a dashboard has global filters, you’ll see the filter icon (🔍) in the lower part of the screen. Tap it to open the Global Filters panel, where you can adjust filters and see the affect across multiple dashboard widgets.



How: Analytics is available for devices running Android 5 or later. For the latest enhancements, download Einstein Analytics from Google Play™.

Display Einstein Discovery Recommendations on a Salesforce Object (Generally Available)

Use the predictive power of Einstein Discovery to improve your everyday business decisions. With some configuration, Einstein Discovery can predict an outcome or recommend a course of action for a Salesforce object of your choice.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics and Einstein Discovery are available for an extra cost in Enterprise, Performance, and Unlimited editions, and they're also available in Developer Edition.

Who: To connect an Einstein Discovery model to a Salesforce object, a user must have the Connect Einstein Discovery Model permission. To install the managed package, a user must have the Customize Application AND Modify All Data permissions, OR the Manage Connected Apps permission. To define an Apex trigger, a user must have the Author Apex permission.


How: Create a story in Einstein Discovery, then deploy the model to Salesforce. Create custom fields in Salesforce to display the recommendations, then connect Einstein Discovery to the custom fields. Install a managed package to help you create your apex triggers. Then create the apex trigger to retrieve the Einstein Discovery predictions whenever the data is updated.

SEE ALSO:

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Communities: Pre-Built Themes, Sharing Sets for Everyone, Pinned Posts, and Closed Threads

The Community Cloud makes waves this summer with fabulous new features. We're excited to introduce ready-made themes in Community Builder, so you can change the look and feel of your community with a few clicks. We also expanded support for sharing sets, now available to Customer Community Plus and Partner Community users. Add some exciting new features on feeds, such as pinning posts and closing threads. Who needs a summer vacation when there's so much fun in your community?

 **Tip:** Lots of Lightning is striking Salesforce these days—Lightning Experience, Lightning Bolts, Lightning components—and it can be tricky to know how it all applies to communities. Here's the rundown.

Lightning communities use the same underlying technology as Lightning Experience—namely, the Lightning platform and Lightning components—but you aren't required to enable Lightning Experience to use them.

IN THIS SECTION:

[Lightning Communities: Community Builder Improvements with Turnkey Themes, Progressive Rendering, and Audience Deletion](#)

Change the look and feel of your Lightning community with a few clicks using ready-made themes in Lightning Builder. Control your community's first impression by using Progressive Rendering to determine which components get priority loading. Delete audiences when you no longer need them.

[Lightning Communities: New and Improved Lightning Components](#)

We added new components for use in Lightning Communities, and made existing ones even better. Give your communities access to all Salesforce field service objects. And let community members view paused flows, and resume them, in a community.

[Security: Passwordless Login, Set Validity Period for Login Links](#)

Give your customers the convenience of logging in with verification codes instead of passwords. Build dashboards for them to manage the phone numbers and email addresses they use for verification. Set different community login policies to relax requirements for internal users. And to improve your community experience, control how long ID tokens and verification links are valid.

[Sharing: Sharing Set Support for More Licenses \(Beta\), Improved Case Access \(Beta\)](#)

We extended sharing set support to more licenses and for the Contacts to Multiple Accounts feature. You can also control community user access to cases. All improvements are in beta.

[Community Engagement: Recognition Badges \(Beta\) and Question-and-Answer Journey Builder Triggers](#)

Keep your community active and members engaged. Give your members recognition badges for milestones, and send emails after question or answer activity.

[Chatter in Lightning Communities: Close Conversations to Further Action, Post Pinning and Cross-Community Streams Are Generally Available](#)

Summer '18 ushers in mature features that move from pilot or beta status to generally available. Both cross-community streams and post pinning have graduated. Also, there's an exciting new feature for closing posts, questions, and polls to new actions.

[Partner Central: Delegated Account Management, Audience Targeting and Sharing for Channel Programs and Levels, and More](#)

Partner users can manage their own sales teams with enhanced delegated administration. Admins and channel managers can create custom community experiences for channel programs and levels. Partner users and managers get more out of the campaign marketplace with highlighted campaigns, additional data fields, and greater flexibility when using market development funds.

[Files: Library Management and a New Files Detail Page](#)

Customize libraries and files in your Communities to make them work for you. Bring your library tile components to life with images, reinforcing your brand and delighting your users. Add standard and custom fields to your file detail pages to track exactly what you need for your business.

[Other Changes in Communities](#)

Learn about smaller changes that improve your experience with communities.

Lightning Communities: Community Builder Improvements with Turnkey Themes, Progressive Rendering, and Audience Deletion

Change the look and feel of your Lightning community with a few clicks using ready-made themes in Lightning Builder. Control your community's first impression by using Progressive Rendering to determine which components get priority loading. Delete audiences when you no longer need them.

IN THIS SECTION:

[Update Your Lightning Community to the Latest Template](#)

We are always adding improvements to Lightning communities, but you can't take advantage of them without the latest template. So if you haven't updated yet, don't get left behind.

[Customer Service \(Napili\) Has a New Name](#)

As part of the evolution and expansion of community templates, Customer Service (Napili) is now called Customer Service.

[Update Your Community Look and Feel Quickly by Changing Themes](#)

Admins and designers can now select from a library of pre-built themes and customize them with clicks, not code, using new controls in Community Builder.

[Improve Your Customer's Community Experience with Progressive Rendering](#)

Now you have finer control of your community's first impressions with Progressive Rendering. You can specify in which order components are displayed when the page loads to optimize your site's speed. For instance, have material at the top of a long page display first while content that isn't in screen view loads later.

[Build and Distribute Business Solutions Using Lightning Bolt Solutions](#)

To reflect its expanded capabilities, Lightning Bolt is now renamed Lightning Bolt Solutions. You can quickly and easily build a turnkey Salesforce solution that includes custom apps or flows, with or without a Lightning Community template or page. Distribute your solution to other orgs, or share or sell it on AppExchange.

[Delete Audiences](#)

Delete your unused or underused audiences to keep your list of audiences trimmed down to what's current and active. When you delete an audience, all the audience assignments are also deleted. Not sure whether the audience is still in use somewhere? We've got you covered. We show you all the places where the audience is assigned in your published and unpublished communities so you know what to expect.

[Save Navigation and Tile Menu Changes as Draft](#)

Previously, anything you added to your live community's navigation or tile menus published immediately. Efficient, but it did make it a bit tricky to experiment with items or try out new ideas because they went live right away. There are some things that you just don't want to go public. Now when you add items to the navigation or tile menus, they stay in a draft state until you are ready to publish. Changes to the navigation and tile menus publish along with everything else when you click Publish, and no sooner.

[Display CMS Content in Your Community Using CMS Connect JSON \(Generally Available\)](#)

You can now reuse blogs and articles that are already published in an external content management system (CMS). If your CMS supports JSON APIs, you can pull content into your community pages. If you used this feature in beta, we improved search engine optimization and usability. For content lists, we moved the node path from the Community Builder to the CMS Connect menu.

[Configure Named Credentials for CMS Connect JSON \(Generally Available\)](#)

You can access authenticated content via CMS Connect (JSON) using named credentials. If you used this capability in beta, it hasn't changed, except that it's available by default. No need to contact Salesforce Support to activate it.

[Get Better SEO for Better Content Discovery](#)

Public objects and fields can now be indexed by outside services for better discoverability. Get a larger audience with minimal effort by allowing external services to index public entities including content served from CMS Connect (JSON) feeds. You can control what's indexed.

[Update Your <h1> Tag Overrides to <h3> for Topic Detail and Search Results Article Titles](#)

To improve accessibility to our communities, we updated the <h1> tags for article titles in Topic Detail and Search Results components. If you've overridden the <h1> tags, make sure that you update them to <h3> so that they continue working.


[Update Your <ui:button> Overrides for Some Lightning Community Components](#)

We changed the <ui:button> to <lightning:button> in these Community Builder components: Case Deflection, Global Search for Peer-To-Peer Communities, Search & Post Publisher, Topic Articles by Topic, and Related Record List.

Update Your Lightning Community to the Latest Template

We are always adding improvements to Lightning communities, but you can't take advantage of them without the latest template. So if you haven't updated yet, don't get left behind.

Where: Update your Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: If you are updating your community from Spring '18 to Summer '18, here's what's controlled by the update flag () in Community Builder.

- If you've installed Language Picker in your community, we made some upgrades that require an update. Your current preference will be maintained, but the button look and act a bit different, so have a look.
- Improvements to the property editor container.

- Important:** Before updating to Summer '18, make sure that you check out [Update Your Community](#), which explains how the update can affect your community. Also see [Migrate CSS Overrides](#) to check specific selector changes that might affect your custom CSS. Then do a test run in a sandbox before updating it in your production org.
- Important:** If you haven't updated your community since Winter '18, check out this [release note](#) with important information. This help topic can be outdated or unavailable during release preview, so check back to ensure that you understand the full impact of the update.

SEE ALSO:

[Salesforce Help: Update Your Community's Template](#)
[Language Picker Renamed and Other Improvements](#)
[Salesforce Help: Custom Theme Layouts and Theme Layout Components](#)

Customer Service (Napili) Has a New Name

As part of the evolution and expansion of community templates, Customer Service (Napili) is now called Customer Service.

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SEE ALSO:

[Update Your Lightning Community to the Latest Template](#)
[Salesforce Help: Update Your Community's Template](#)

Update Your Community Look and Feel Quickly by Changing Themes

Admins and designers can now select from a library of pre-built themes and customize them with clicks, not code, using new controls in Community Builder.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: To choose a new theme select, **Change Theme** in the Themes menu of Community Builder. Adjust the theme settings and components to meet the needs of your community and customer. Experiment to see what works best.

SEE ALSO:

[Salesforce Help: Update Your Community's Template](#)
[Language Picker Renamed and Other Improvements](#)
[Salesforce Help: Custom Theme Layouts and Theme Layout Components](#)

Improve Your Customer's Community Experience with Progressive Rendering

Now you have finer control of your community's first impressions with Progressive Rendering. You can specify in which order components are displayed when the page loads to optimize your site's speed. For instance, have material at the top of a long page display first while content that isn't in screen view loads later.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: To take advantage of this feature, turn it on in your Community Builder Advanced Settings. Then you can assign components to one of three priority groups (highest, high, or neutral) to control the loading experience of individual pages. Test your assignments before publishing to avoid degrading the page experience rather than enhancing it.

SEE ALSO:

[Salesforce Help: Progressive Rendering Overview](#)

Build and Distribute Business Solutions Using Lightning Bolt Solutions

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SEE ALSO:

[Create Business Solutions with Lightning Bolt Solutions](#)

Delete Audiences

Delete your unused or underused audiences to keep your list of audiences trimmed down to what's current and active. When you delete an audience, all the audience assignments are also deleted. Not sure whether the audience is still in use somewhere? We've got you covered. We show you all the places where the audience is assigned in your published and unpublished communities so you know what to expect.

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Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Display CMS Content in Your Community Using CMS Connect JSON (Generally Available)

You can now reuse blogs and articles that are already published in an external content management system (CMS). If your CMS supports JSON APIs, you can pull content into your community pages. If you used this feature in beta, we improved search engine optimization and usability. For content lists, we moved the node path from the Community Builder to the CMS Connect menu.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: If you're new to this feature, create a connection for your CMS, and add a CMS Connect (JSON) component to your community page. Configure the component's properties using JSON expressions.

SEE ALSO:

[Lightning Communities Developer Guide: Reuse Content with CMS Connect JSON](#)

[Lightning Communities Developer Guide: Example: Connect JSON Content to Your Community](#)

Configure Named Credentials for CMS Connect JSON (Generally Available)

You can access authenticated content via CMS Connect (JSON) using named credentials. If you used this capability in beta, it hasn't changed, except that it's available by default. No need to contact Salesforce Support to activate it.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions. You can authenticate only JSON connections with named credentials.

How: Before you create the CMS connection, define a named credential in your Salesforce settings. Both anonymous and named principal protocols are supported, but per-user authentication is not.

Use Community Workspaces to create the connection, and select **Authenticated** (1) as the connection type. Then choose the named credential (2) to use.

SEE ALSO:

[Lightning Communities Developer Guide: Reuse Content with CMS Connect JSON](#)

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

Get Better SEO for Better Content Discovery

Public objects and fields can now be indexed by outside services for better discoverability. Get a larger audience with minimal effort by allowing external services to index public entities including content served from CMS Connect (JSON) feeds. You can control what's indexed.

Where: This change applies to all communities.

How: After you turn on **Public Access** in the Community Builder General settings, the new SEO tab is available. Control what is indexed by configuring objects and fields as public or not in the Guest User Profile.

SEE ALSO:

[Salesforce Help: Set up SEO for your Community](#)

Update Your `<h1>` Tag Overrides to `<h3>` for Topic Detail and Search Results Article Titles

To improve accessibility to our communities, we updated the `<h1>` tags for article titles in Topic Detail and Search Results components. If you've overridden the `<h1>` tags, make sure that you update them to `<h3>` so that they continue working.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Update Your `<ui:button>` Overrides for Some Lightning Community Components

We changed the `<ui:button>` to `<lightning:button>` in these Community Builder components: Case Deflection, Global Search for Peer-To-Peer Communities, Search & Post Publisher, Topic Articles by Topic, and Related Record List.

Where: This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: The following buttons have been updated to `<lightning:button>`.

- The mobile modal Close button in the Case Deflection component
- The Search, mobile Search, and Close buttons in the Global Search For Peer-To-Peer Communities component
- The Search and Close buttons in the Search & Post Publisher component
- The Show More button in the Top Articles By Topic component
- The View More button in the Related Record List component

The *lightning* namespace components are optimized for common use cases. Beyond being equipped with the Lightning Design System styling, they handle accessibility, real-time interaction, and enhanced error messages.

SEE ALSO:

[Lightning Components Developer Guide: Working with Base Lightning Components](#)

Lightning Communities: New and Improved Lightning Components

We added new components for use in Lightning Communities, and made existing ones even better. Give your communities access to all Salesforce field service objects. And let community members view paused flows, and resume them, in a community.

IN THIS SECTION:

[Access Field Service Data in Lightning Communities](#)

Add any field service object to your Lightning community to share records with your partners, contractors, and customers. Previously, only work orders, work order line items, and service appointments were available in Lightning communities.

[Recommend Actions and Offers to Community Members \(Pilot\)](#)

Add the new Recommended Actions component to run a strategy that determines which propositions to display to your Lightning community members. Propositions can serve any purpose, such as providing a common action or a special offer. When setting up a strategy, you can determine conditions for displaying a given proposition. This component is available as part of the Einstein Next Best Action pilot.

[Let Users View and Resume Paused Flows](#)

Add the new Paused Flows component to let your Lightning community members view all the paused flows they own, resume them at a more convenient time without losing their work, or delete them. When setting up a flow, you can choose particular pause points.

[Use Activity Timeline in Communities](#)

Now you can track your open activities and activity history with the activity timeline and view them from a record information tab in your community. The activity timeline is supported for accounts, campaigns, contacts, contracts, leads, opportunities, orders, quotes, and activity-enabled custom objects.

[Get More Flexibility with Calendars in Communities](#)

Users can quickly update calendar events by dragging them to new time slots. They can also open or hide the side panel details.

[Language Picker Renamed and Other Improvements](#)

We've changed the name of the Language Picker component in Community Builder to Language Selector. We've also added a **Label** field, to help with accessibility and show folks what the Language Selector is doing on the page. Moreover, the button text alignment field is now a dropdown, where you can choose how the text shows on the button.

[Allow Community Users to Create Cases with the Contact Support Button](#)

We've added a standalone Contact Support Button component to Lightning Communities. Previously, you could only use the Contact Support Button coupled with the Ask Button component.

[Easily Choose Topics, Customize the Upload Files Button Label, and More in the Case Deflection and Contact Support Form Components](#)

We made a ton of improvements to the Case Deflection and Contact Support Form components, so your customers can find answers to their questions more quickly. Admins can now customize the **Upload File** button label in the Contact Support Form component to say whatever you'd like. Moreover, the Topic ID field in the Case Deflection component's property editor is now a dropdown menu that includes the community's featured and navigational topics, as well as any topics added by community members. The Case Deflection component now displays articles by default, and discussions previews are read-only.

[Track Customer Concerns by Monitoring the Contact Support Subject Line](#)

We've added the subject field (Term) to the Community Case Deflection Report custom report type. Now, you can report on subject lines that didn't receive any helpful suggestions as customers try to contact support using the Contact Support Form component. How can this help your company? You can discover the subject lines your customers use most when contacting support, which shows the areas of your product they're having the most problems with. Based on the results, your company can create knowledge articles or topics in a community so your customers can find answers more quickly, and highlight areas of improvement.

[Let Customers Book Appointments from Your Community \(Beta\)](#)

Use Snap-ins Appointment Management to let your customers book an appointment with you. After you set up Field Service and the new snap-in, add it to your community using the new Snap-ins Appointment Management component in the Community Builder.

[Do More with the Snap-Ins Chat Component](#)

You can now set a routing order for chats and display the customer's place in line before the chat starts. If you use offline support, you can set the label that appears on the snap-in when your agents are offline. And you can add the static resource names for your external scripts and styles that you want to use to create custom chat events.

[Hide the Connected Sources Tab on User Settings](#)

In Community Builder, the User Settings component now includes a control for hiding the Connected Sources tab. If this tab isn't useful to your community, it's easy to put it out of the way.

[Dependent Picklist to be Updated in Winter '19](#)

Dependent picklists in Lightning components will be updated to function as they do in Salesforce Classic and will no longer be able to set a default value in the Winter '19 release. This will not break your site, but the experience will change for your customers.

Access Field Service Data in Lightning Communities

Add any field service object to your Lightning community to share records with your partners, contractors, and customers. Previously, only work orders, work order line items, and service appointments were available in Lightning communities.


Where: This change applies to Lightning and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic, and all the flavors of the Salesforce mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: To learn more, see [Manage Field Service in Lightning Communities](#).

Recommend Actions and Offers to Community Members (Pilot)

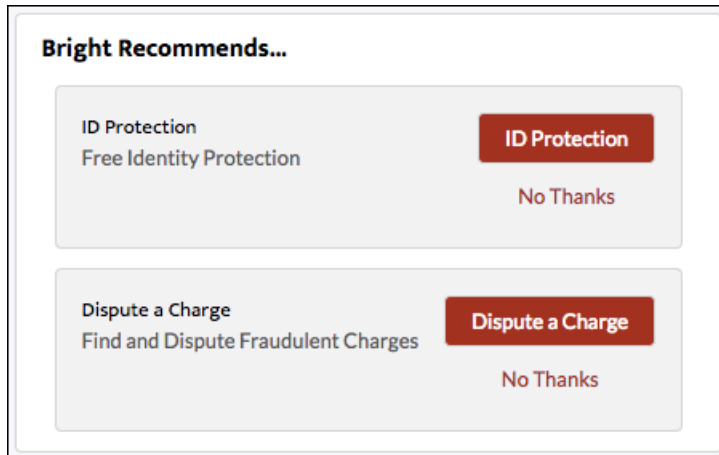
Add the new Recommended Actions component to run a strategy that determines which propositions to display to your Lightning community members. Propositions can serve any purpose, such as providing a common action or a special offer. When setting up a strategy, you can determine conditions for displaying a given proposition. This component is available as part of the Einstein Next Best Action pilot.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

Who: When a user clicks a proposition button, a screen flow is launched. To run a flow, your community members must have either the Run Flows permission or the Flow User field enabled on the user detail page. Flows aren't supported for unauthenticated users.

Why: Let's say a customer creates a case with support and then clicks a link to track its progress. If the description includes "lost credit card," your community displays two recommended flows: one that offers free identity protection, and one that lets the customer dispute recent credit card charges.



SEE ALSO:

[Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#)

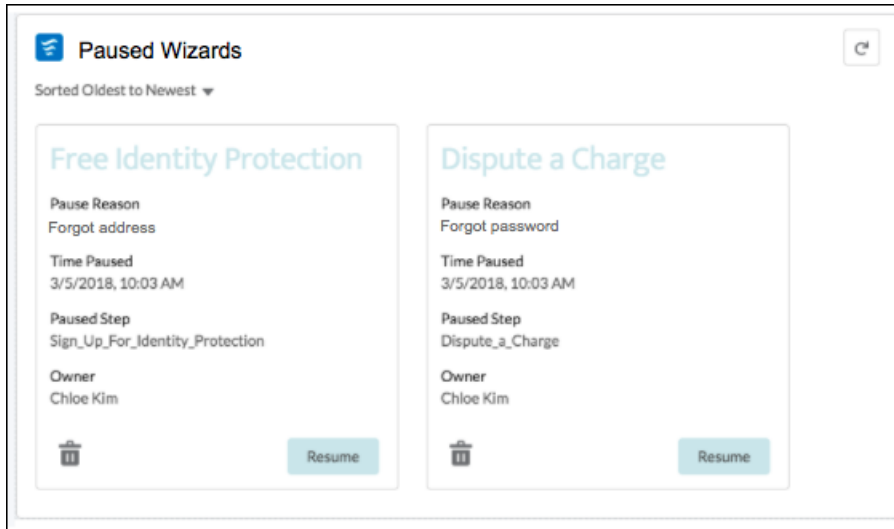
Let Users View and Resume Paused Flows

Add the new Paused Flows component to let your Lightning community members view all the paused flows they own, resume them at a more convenient time without losing their work, or delete them. When setting up a flow, you can choose particular pause points.


Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: To pause a flow, your community members must have the **Run Flows** permission.

Why: For example, your financial company has a flow to help folks apply for a credit card. Your customer gets stuck on one of the steps (what was my address 12 years ago?). Rather than lose the previous screens of information, the customer can press **Pause** to find the needed information. Or, your customer pauses a step and needs help to continue with the forms. The customer can contact your company, and a service agent can continue the flow for them.



How: In **Setup > Process Automation Settings**, select **Let users pause flows**. Once you set up a pause point in your flows, you can use the Paused Flows component in the Community Builder.

 **Note:** While we call them flows here at Salesforce, your company could call them processes, forms, steps, or wizards. Use a naming convention that your customers understand for the title field.

SEE ALSO:

[Salesforce Help: Pause a Flow Interview \(can be outdated or unavailable during release preview\)](#)

Use Activity Timeline in Communities

Now you can track your open activities and activity history with the activity timeline and view them from a record information tab in your community. The activity timeline is supported for accounts, campaigns, contacts, contracts, leads, opportunities, orders, quotes, and activity-enabled custom objects.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Track and manage all activities from your partner community using the Activity timeline.

The screenshot displays the 'ACTIVITIES' component in a Lightning Community. At the top, there are three tabs: 'ACTIVITIES' (selected), 'RELATED', and 'DETAILS'. Below the tabs, there is a navigation bar with buttons for 'New Task', 'New Event', 'Email', and 'Log a Call'. Underneath is a text input field labeled 'Create a task...' and an 'Add' button. A filter bar shows 'Filters: All time • All activities • All types' with a dropdown arrow. Below the filter bar are 'Refresh' and 'Expand All' links. The main content is divided into 'Next Steps' and 'Past Activities' sections. 'Next Steps' includes 'Send Letter' (due Mar 19) and 'blitz' (due Mar 16), both with 'More Steps' links. 'Past Activities' includes 'invite all for blitz' (2:00 PM | Mar 16), 'Meeting' (1:00 AM | Mar 16), 'Call' (Mar 16), and 'Call' (Mar 6).

Get More Flexibility with Calendars in Communities

Users can quickly update calendar events by dragging them to new time slots. They can also open or hide the side panel details.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Find this component in the Community Builder.

 **Note:** The option to hide or open the side panel in the Communities Calendar is only available in calendars that have been configured to **Show Calendar Sidebar**.

SEE ALSO:

[Update Calendar Items by Dragging Them in Lightning Experience](#)

[Enhance Your Calendar View in Lightning Experience](#)

Language Picker Renamed and Other Improvements

We've changed the name of the Language Picker component in Community Builder to Language Selector. We've also added a **Label** field, to help with accessibility and show folks what the Language Selector is doing on the page. Moreover, the button text alignment field is now a dropdown, where you can choose how the text shows on the button.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: In order to see Summer '18 changes to the Language Selector, you must manually update your community template in Community Builder.

Allow Community Users to Create Cases with the Contact Support Button

We've added a standalone Contact Support Button component to Lightning Communities. Previously, you could only use the Contact Support Button coupled with the Ask Button component.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: You prefer to keep these actions and buttons separate from a design perspective. The new Contact Support Button gives you the flexibility to place distinct calls to action in distinct parts of your community.

Easily Choose Topics, Customize the Upload Files Button Label, and More in the Case Deflection and Contact Support Form Components

We made a ton of improvements to the Case Deflection and Contact Support Form components, so your customers can find answers to their questions more quickly. Admins can now customize the **Upload File** button label in the Contact Support Form component to say whatever you'd like. Moreover, the Topic ID field in the Case Deflection component's property editor is now a dropdown menu that includes the community's featured and navigational topics, as well as any topics added by community members. The Case Deflection component now displays articles by default, and discussions previews are read-only.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Track Customer Concerns by Monitoring the Contact Support Subject Line


We've added the subject field (Term) to the Community Case Deflection Report custom report type. Now, you can report on subject lines that didn't receive any helpful suggestions as customers try to contact support using the Contact Support Form component. How can this help your company? You can discover the subject lines your customers use most when contacting support, which shows the areas of your product they're having the most problems with. Based on the results, your company can create knowledge articles or topics in a community so your customers can find answers more quickly, and highlight areas of improvement.

Where: This feature is available as part of the Case Deflection Analytics package for the Community Cloud, available shortly after the Summer '18 release. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Let Customers Book Appointments from Your Community (Beta)

Use Snap-ins Appointment Management to let your customers book an appointment with you. After you set up Field Service and the new snap-in, add it to your community using the new Snap-ins Appointment Management component in the Community Builder.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Snap-ins Appointment Management is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

SEE ALSO:

[Snap-Ins Appointment Management: Let Customers Book, Modify, and Cancel Appointments \(Beta\)](#)

Do More with the Snap-Ins Chat Component

You can now set a routing order for chats and display the customer's place in line before the chat starts. If you use offline support, you can set the label that appears on the snap-in when your agents are offline. And you can add the static resource names for your external scripts and styles that you want to use to create custom chat events.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Set a Routing Order to Fine-Tune How Chats Are Assigned to an Agent](#)

[Display a Customer's Place in Line Before the Chat Starts](#)

[Collect Cases When Your Chat Agents Are Off the Clock](#)

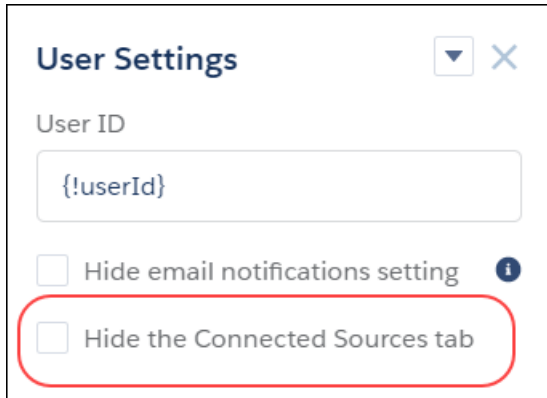
[Make Your Own Custom Events for Chats](#)

Hide the Connected Sources Tab on User Settings

In Community Builder, the User Settings component now includes a control for hiding the Connected Sources tab. If this tab isn't useful to your community, it's easy to put it out of the way.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: In the properties for the User Settings component, select **Hide the Connected Sources tab**.



Dependent Picklist to be Updated in Winter '19

Dependent picklists in Lightning components will be updated to function as they do in Salesforce Classic and will no longer be able to set a default value in the Winter '19 release. This will not break your site, but the experience will change for your customers.

SEE ALSO:

[Salesforce Help: Dependent Field Considerations](#)

Security: Passwordless Login, Set Validity Period for Login Links

Give your customers the convenience of logging in with verification codes instead of passwords. Build dashboards for them to manage the phone numbers and email addresses they use for verification. Set different community login policies to relax requirements for internal users. And to improve your community experience, control how long ID tokens and verification links are valid.

IN THIS SECTION:

[Optimize Account Roles to Improve Performance and Scale Your Org \(Generally Available\)](#)

Minimizing the number of roles you use for customer and partner community accounts can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single community user. In this scenario, all accounts with one community user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles. This feature was a pilot in Spring '18 and is now generally available.

[Make It Easy for Your Community Users to Log In with Identity Verification Methods Instead of Passwords](#)

Give your community members, customers, and other external users the convenience of logging into your community with a verification code instead of a password. For example, have your external users log in with a code that you send in an email or text message. This feature is called passwordless login.

[Expire Community Links in Welcome Emails](#)

You know that handy link to the community that we send out in our welcome emails? Now you can determine how long that link is live. One day? Seven days? One hundred and eighty days? It's up to you!

[Administrator-Initiated Password Reset Links Expire After 24 Hours](#)

Administrator-initiated password reset links in emails to users expire after 24 hours. Previously, these links did not expire. The new validity period also applies to password reset links in emails sent before Summer '18.

[Keep Links in Forgot Password Emails from Expiring Prematurely](#)

We've all forgotten a password and requested to reset it, right? Improve your users' experience, and let reset password links in forgot password emails stay active until a user confirms the password reset request. Previously, the links in forgot password emails expired after the link was clicked.

[Enable Users to Review and Manage Their Verification Methods](#)

Give users more control over the identity verification methods that they use to access your org. You can use administrative tools to build custom registration screens and verification dashboards for both internal and external users. With custom interfaces, users can review and manage the mobile phone numbers and email addresses that they use for verification.

[Trailing Slash Removed from an ID Token's Issuer URL](#)

Salesforce no longer adds a trailing slash (/) to the issuer URL for a community that does not have a root path prefix (/) in the ID token. This change conforms to the OpenID Connect Discovery standard.

[Authentication Provider Endpoints Require HTTP or HTTPS](#)

Authentication provider endpoints must start with HTTP or HTTPS. Non-HTTP protocols, such as data://, feed://, or ftp://, are no longer supported in Auth. provider URLs.

[Configure the Validity Period and Audiences for ID Tokens](#)

When you configure authentication settings for a connected app, you can now specify the length of time that an ID token is valid for after it's issued. Also, you can specify multiple audiences for the ID token.

[Set Different Login Policies for Salesforce and Community Users \(Beta\)](#)

If you have a community set up in your org, you can specify different login policies for internal users. Control access to the Salesforce app and communities separately. For instance, you can relax device activation and IP constraints for internal, trusted users to provide a better login experience.

[Renamed Option for Verifying Community External Users' Identity](#)

When external users access a Salesforce community from a new device or browser, you can verify their identity as an extra measure of security. On an external user's profile, the option **Verify identity when external users access Salesforce from new browser or device (device activation)** has been renamed **Enable device activation**.

[Make Sure That Your Head Markup Is Valid](#)

Do you have custom markup in your `<head>` markup? To improve security, in Summer '19 all existing code must be compliant for the `<head>` to function, and all new code must be compliant to be saved. This enhancement builds on the changes introduced in Winter '18 that applied extra restriction to `<head>`.

Optimize Account Roles to Improve Performance and Scale Your Org (Generally Available)

Minimizing the number of roles you use for customer and partner community accounts can improve performance. Consider using account role optimization if you anticipate having a large volume of business accounts with a single community user. In this scenario, all accounts with one community user owned by the same employee use a single shared person role. This optimization could replace the need for possibly thousands of account roles. This feature was a pilot in Spring '18 and is now generally available.

Where: This change applies to all communities.

How:

1. From Setup, enter *Sharing Settings* in the Quick Find box, and select **Sharing Settings**.
2. In the Other Settings section, enable **Use person role for first user in community account**.

Make It Easy for Your Community Users to Log In with Identity Verification Methods Instead of Passwords

Give your community members, customers, and other external users the convenience of logging into your community with a verification code instead of a password. For example, have your external users log in with a code that you send in an email or text message. This feature is called passwordless login.

Where: This feature is available for Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available only for users with an External identity or community license. Contact Salesforce Customer Support to use the SMS verification method (beta).

SEE ALSO:

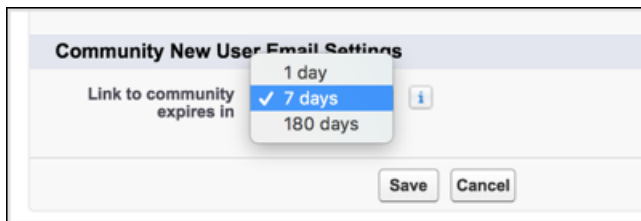
[Make It Easy for Your External Users to Log In to Your Community with Passwordless Login](#)

Expire Community Links in Welcome Emails

You know that handy link to the community that we send out in our welcome emails? Now you can determine how long that link is live. One day? Seven days? One hundred and eighty days? It's up to you!

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic, and all flavors of the Salesforce mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Select the amount of time you want the link to be live in [Communities Settings](#).



SEE ALSO:

[Set When Links Expire in Welcome Emails](#)

Administrator-Initiated Password Reset Links Expire After 24 Hours

Administrator-initiated password reset links in emails to users expire after 24 hours. Previously, these links did not expire. The new validity period also applies to password reset links in emails sent before Summer '18.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic, and all flavors of the Salesforce mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

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SEE ALSO:

[Set the Validity Period and Audiences for ID Tokens](#)

Set Different Login Policies for Salesforce and Community Users (Beta)

If you have a community set up in your org, you can specify different login policies for internal users. Control access to the Salesforce app and communities separately. For instance, you can relax device activation and IP constraints for internal, trusted users to provide a better login experience.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic, and all flavors of the Salesforce mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

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Where: This change applies to Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Wondering if your code is OK? Check the **Head Markup** section in the Advanced Settings tab of Community Builder. If you have invalid code, you see an alert to fix it. When you are adding code, watch for the indicators in the code window. But even if you miss that, we let you know if and where you have an issue when you try to save.

SEE ALSO:

[Salesforce Help: Add Markup to the Page <head>](#)

Sharing: Sharing Set Support for More Licenses (Beta), Improved Case Access (Beta)

We extended sharing set support to more licenses and for the Contacts to Multiple Accounts feature. You can also control community user access to cases. All improvements are in beta.

IN THIS SECTION:

[Use Sharing Sets with All Customer and Partner Licenses \(Beta\)](#)

You can now use sharing sets with the Customer Community Plus and Partner Community licenses, or in other words, with role-based community licenses.

[Use Sharing Sets with Contacts with Multiple Accounts \(Pilot\)](#)


Yes, sharing sets now support the Contacts with Multiple Accounts feature. Let's say you create a community or portal user from a contact that is associated with multiple accounts. You can then create a sharing set that grants access to all records with a lookup to any account that contact is related to.

[Restrict Community Users' Access to Cases \(Beta\)](#)

Determine whether users with Customer Community Plus licenses can view and edit cases in which they are listed as the contact. You can now disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

Use Sharing Sets with All Customer and Partner Licenses (Beta)


You can now use sharing sets with the Customer Community Plus and Partner Community licenses, or in other words, with role-based community licenses.

 **Note:** As a beta feature, sharing sets for all customer and partner licenses is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

For information on enabling this feature in your org, contact Salesforce.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.


Why: Previously, sharing sets were limited to Customer Community users. Users upgraded to Customer Community Plus lost sharing access via sharing sets. Now, Customer Community users can retain sharing sets when they're upgraded and also use sharing rules and role-based sharing. And now even users with Partner Community licenses can use sharing sets!

 **Note:** Access granted to users via sharing sets does not roll up to users higher to them in their role hierarchies. Also, the share groups functionality isn't available to users with Customer Community Plus and Partner Community licenses.

Use Sharing Sets with Contacts with Multiple Accounts (Pilot)

Yes, sharing sets now support the Contacts with Multiple Accounts feature. Let's say you create a community or portal user from a contact that is associated with multiple accounts. You can then create a sharing set that grants access to all records with a lookup to any account that contact is related to.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** We provide Sharing Sets for Contacts with Multiple Accounts 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. Sharing Sets for Contacts with Multiple Accounts 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 Sharing Sets for Contacts with Multiple Accounts in the [IdeaExchange](#) or the Sharing Sets for CMA (Pilot) group in the Trailblazer Community.

Who: Users with the following licenses can use sharing sets:


- Authenticated Website User
- Customer Community Login User
- Customer Community User
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website User
- Overage High Volume Customer Portal User

How: In Setup, search for *Communities Settings*. [Create a sharing set](#), and select **Contact** in the User dropdown list. Select **Contact.RelatedAccount** in the Target Object field.

Restrict Community Users' Access to Cases (Beta)

Determine whether users with Customer Community Plus licenses can view and edit cases in which they are listed as the contact. You can now disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

Where: This change applies to all communities.

 **Note:** As a beta feature, restricting community users' access to cases is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

Why: For example, Acme has offices around the world, and it wants to keep its cases private within each office location. By disabling the standard sharing behavior, community users who transfer from one of Acme's locations to another can no longer bring their assigned cases with them.

How:

1. Contact Salesforce Customer Support to disable case access for community users. After this setting is disabled, edit your Sharing Settings.
2. From Setup, enter *Sharing Settings* in the Quick Find box, and then select **Sharing Settings**.
3. In the Other Settings section, deselect **Grant community users access to related cases**.

SEE ALSO:

[Salesforce Help: Optimize Account Roles to Improve Performance and Scale Your Org \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Sharing Considerations for Using Account Role Optimization in Communities \(can be outdated or unavailable during release preview\)](#)

Community Engagement: Recognition Badges (Beta) and Question-and-Answer Journey Builder Triggers

Keep your community active and members engaged. Give your members recognition badges for milestones, and send emails after question or answer activity.

IN THIS SECTION:

[Celebrate Community Members with Recognition Badges \(Beta\)](#)

Keep your members involved by acknowledging their accomplishments with recognition badges. Using Work.com's Thanks badges as a base, you can create and give badges recognizing individual members. We included some to get you started: Congratulations, Nice Work, Thanks, and Welcome. Or, you can create your own. The badges display in the feed and on the member's profile.

[Use Marketing Journeys to Reward Member Question-and-Answer Activity](#)

Boost community engagement based on community feed activity. Connect with members who ask or answer questions, or contact folks who've been a little too quiet lately, and help keep them involved in your community.

[Use Posts at Scale to Reach Multiple Members at Once](#)

You have a message that you want to post to lots of community members, like a special event or notification. Posting to each person is a time-consuming task. Instead, use Posts at Scale in the Engagement Queue to post that message to up to 500 members at once.

[Enjoy the Look of Updated Engagement Queue Pages](#)

The Engagement Queue pages have a shiny, new look and feel to match the rest of the queues. Filtering is easier and opens up the option for customizing bulk actions.

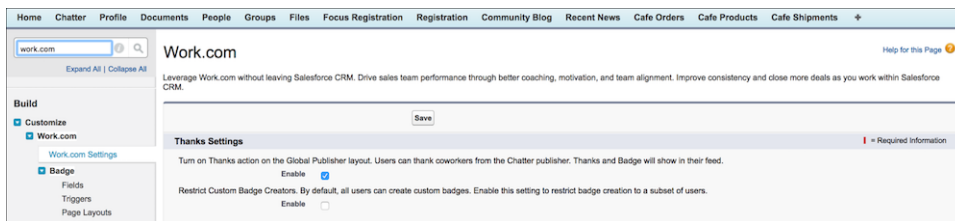
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Keep your members involved by acknowledging their accomplishments with recognition badges. Using Work.com's Thanks badges as a base, you can create and give badges recognizing individual members. We included some to get you started: Congratulations, Nice Work, Thanks, and Welcome. Or, you can create your own. The badges display in the feed and on the member's profile.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

As a beta feature, Recognition Badges, as well as the Gamification tile, is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. Recognition Badges is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Recognition badges in the [Lightning Community Badges \(Summer 18\)](#) group in the Trailblazer Community. For information on enabling this feature in your org, contact Salesforce Support or contact the product manager through the Trailblazer Community.

How: Enable Work.com's Thanks feature. From Setup, enter *work.com* in the Quick Find box, and then select **Work.com Settings**. We recommend that you allow only community managers to create custom badges to keep control of the number of badges created and avoid duplicates.



Then go to your Lightning Community's Workspaces, and click the Gamification tile to enter the wonderful world of recognition badges.

BADGE NAME	DESCRIPTION	ACTIVE	CREATED BY	CREATED DATE	LAST MODIFIED DATE
Welcome	Welcome! We're glad you're here.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2018, 9:43 AM	3/23/2018, 9:43 AM
Congratulations	Wonderful news!	<input checked="" type="checkbox"/>	Michael Manager	3/23/2018, 9:43 AM	3/23/2018, 9:43 AM
Nice Work	Kudos for a job well done.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2018, 9:43 AM	3/23/2018, 9:43 AM
Thanks	Thank you for being awesome.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2018, 9:43 AM	3/23/2018, 9:43 AM

Feeling ambitious? Using Process Builder, you can create a way to automatically award badges to users who reach certain milestones.

Use Marketing Journeys to Reward Member Question-and-Answer Activity

Boost community engagement based on community feed activity. Connect with members who ask or answer questions, or contact folks who've been a little too quiet lately, and help keep them involved in your community.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: You must have both Community and Marketing Cloud licenses to use this feature.

Why: Keeping members involved is important to the health of your community. Email journeys, delivered by Marketing Cloud's Journey Builder, can help do just that. Basing them on community feed activity opens up lots of opportunities to connect. For example, automatically send email to members who have five answers marked as "best" and invite them to become MVPs. Or use Journey Builder to email thanks to users who ask or answer questions. Prompt questioners to endorse the person who answered their question. Or, create a journey to send a note to members who haven't posted in a while and encourage them to come back.

How: Create journeys using the Marketing Cloud Journey Builder tools, and quickly start reaching your members in new ways.

Use Posts at Scale to Reach Multiple Members at Once

You have a message that you want to post to lots of community members, like a special event or notification. Posting to each person is a time-consuming task. Instead, use Posts at Scale in the Engagement Queue to post that message to up to 500 members at once.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Click the **Select All** checkbox at the top of your report. If you have more than 500 members in your results, only the first 500 are selected to keep performance at a maximum. After completing the post, rerun the report, and repeat the bulk post operation.

Enjoy the Look of Updated Engagement Queue Pages

The Engagement Queue pages have a shiny, new look and feel to match the rest of the queues. Filtering is easier and opens up the option for customizing bulk actions.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Chatter in Lightning Communities: Close Conversations to Further Action, Post Pinning and Cross-Community Streams Are Generally Available

Summer '18 ushers in mature features that move from pilot or beta status to generally available. Both cross-community streams and post pinning have graduated. Also, there's an exciting new feature for closing posts, questions, and polls to new actions.

IN THIS SECTION:

[Close a Conversation in Communities](#)

The question is answered, the topic discussed, the poll decided—what do you do now? You end the conversation. Community admins, moderators, and permitted members can now close a question, poll, or post. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

[Pin Posts to Feeds \(Generally Available\)](#)

Put vital information front and center by pinning important posts to the top of group and topics feeds. Now that post pinning is generally available, we boosted the number of posts you can pin in a feed to three.

[Check Community Streams Without Leaving Salesforce \(Generally Available\)](#)

When you're taking care of business in Lightning Experience, you can quickly check on your communities without switching context. Rather than jumping from your Salesforce org to your community and back, simply open a community stream from your internal org to see the latest. You can post and comment, ask questions and add polls, and take many other actions typically available in a stream.

[Hide an Article's Topics](#)

The new **Show topics** option in the Article Content component's properties in Community Builder makes it easy to show or hide the topics assigned to an article. Previously, topics always appeared, and you couldn't hide them.

[Message Button Now Shown on Mobile Profiles](#)

The Message button that's shown on profiles in the desktop view of your community is now available on user profiles in the mobile browser app.

[View Rich Publisher App Information in Emails](#)

You can now see app information in your email notifications, making it easier to share Rich Publisher Apps.

[Get Email Notifications for Upvotes](#)

Do you struggle to keep up with your community feed? Want to be informed without checking your feed every 10 minutes? To help you track all your feed activity, you can receive notifications whenever your posts and comments are upvoted. The notification includes the user who upvoted, where the comment or post is located, its content, and a link to the post.

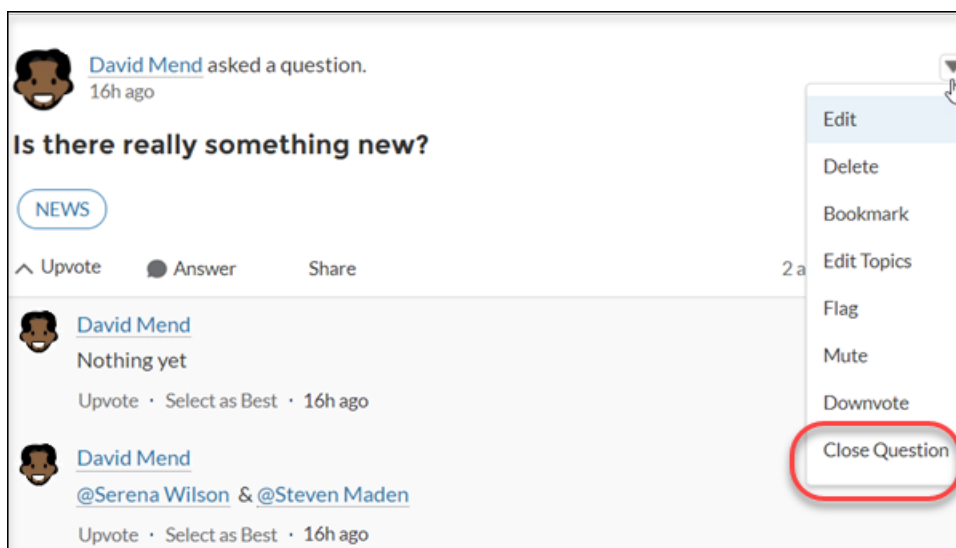
Close a Conversation in Communities

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Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: Community admins and moderators can close posts, polls, and questions without any special configuration. Admins can assign the Close Conversation Threads permission to community members.

Why: Closing conversations is available in group, topic, discussion, and user profile feeds. The close action is available on the post, question, or poll's overflow menu in both the full feed and the feed item's detail view. When a conversation is exposed in your internal org, for example, through a cross-community stream, the conversation's open or close status is respected.



How: The actions available after a conversation is closed vary, usually according to a user's role or permission set. Here's who can do what on a closed conversation.

Action	Availability on a Closed Conversation
Add a comment	Blocked
Answer a question	Blocked
Vote on a poll	Blocked
Edit a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads in Feeds permission
Edit a topic	Available

Action	Availability on a Closed Conversation
Delete a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads in Feeds permission
Publish a pending review comment (community moderation)	Available to admins and moderators
Like or unlike; upvote or downvote	Available
Select or remove a best answer	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads in Feeds permission
Company verify; remove verification	Available only to people with the Verify Answers to Chatter Questions permission
Flag	Available
Share	Available
Bookmark	Available
Mute and unmute	Available
Escalate to case	Available only to people permitted to escalate a feed item to a case

[Chatter REST API](#) and [Chatter in Apex](#) support closed conversations.

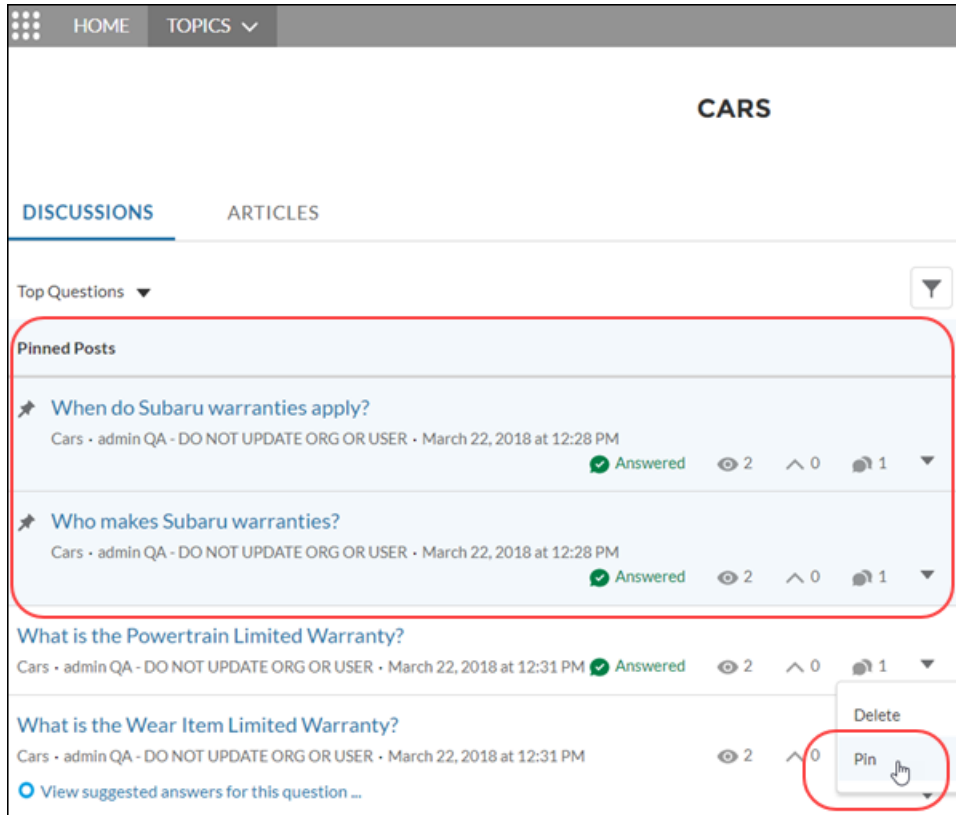
Pin Posts to Feeds (Generally Available)

Put vital information front and center by pinning important posts to the top of group and topics feeds. Now that post pinning is generally available, we boosted the number of posts you can pin in a feed to three.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: Admins can enable post pinning and assign pinning permission through Setup. When post pinning is enabled, admins, community managers, and group owners and managers can pin posts. Other users can pin posts when you assign them permission.

Why: Increase post visibility with pinned posts. Pin up to three posts to the top of group and topics feeds.



How: In your org, go to **Setup > Chatter Settings** and select **Allow post pinning**. After you enable post pinning for your org, admins, community managers, group owners, and group managers can pin posts. You can also assign the Pin Posts in Feeds permission to selected users. Assign post pinning permission in Setup through user profiles and permission sets.

SEE ALSO:

[Salesforce Help: Assign Post Pinning Permission \(can be outdated or unavailable during release preview\)](#)

Check Community Streams Without Leaving Salesforce (Generally Available)

When you're taking care of business in Lightning Experience, you can quickly check on your communities without switching context. Rather than jumping from your Salesforce org to your community and back, simply open a community stream from your internal org to see the latest. You can post and comment, ask questions and add polls, and take many other actions typically available in a stream.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: The file attachment and inline image icons are not available when you work with a community stream from your internal org. But you get them back when you work in the stream in your community.

Hide an Article's Topics

The new **Show topics** option in the Article Content component's properties in Community Builder makes it easy to show or hide the topics assigned to an article. Previously, topics always appeared, and you couldn't hide them.

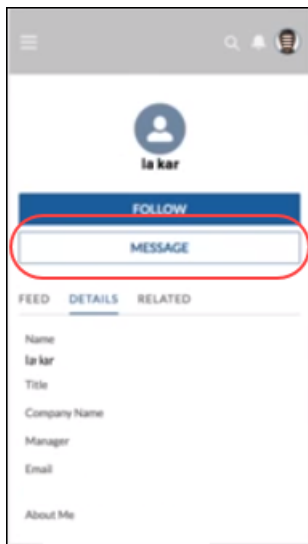
Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Message Button Now Shown on Mobile Profiles

The Message button that's shown on profiles in the desktop view of your community is now available on user profiles in the mobile browser app.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Use the Message button to start a message to another community member right from the member's profile.



View Rich Publisher App Information in Emails

You can now see app information in your email notifications, making it easier to share Rich Publisher Apps.

Where: This feature is available in Lightning and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Get Email Notifications for Upvotes

Do you struggle to keep up with your community feed? Want to be informed without checking your feed every 10 minutes? To help you track all your feed activity, you can receive notifications whenever your posts and comments are upvoted. The notification includes the user who upvoted, where the comment or post is located, its content, and a link to the post.

Where: This feature is available in Lightning and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: To turn on Upvote Notifications, go to **Settings**. Under **Chatter > Email Notifications**, select **Likes or upvotes my post or comment**.

Partner Central: Delegated Account Management, Audience Targeting and Sharing for Channel Programs and Levels, and More

Partner users can manage their own sales teams with enhanced delegated administration. Admins and channel managers can create custom community experiences for channel programs and levels. Partner users and managers get more out of the campaign marketplace with highlighted campaigns, additional data fields, and greater flexibility when using market development funds.

IN THIS SECTION:

[Empower External Delegated Admins to Manage Their Teams \(Beta\)](#)

Help your delegated admins keep partner users moving forward with the Members page in Account Management. With just a few clicks, delegated admins can activate and deactivate members. They can also reset member passwords from the same page.

[Let Delegated Admins Manage and Share Branding Assets \(Beta\)](#)

Delegated external admins can store partner branding assets on the Branding page. Channel managers can access this page to create co-branded emails, marketing campaigns, and websites. Partners can use information collected from the Branding page in partner-specific apps. For example, the Distributor Locator app can use information from the company details, such as addresses, websites, and contact info, to find distributors closest to them.

[Give More Details with Campaign Marketplace \(Generally Available\)](#)

Channel managers can highlight a type of campaign to showcase important aspects and help partners quickly pinpoint what they're most interested in running. They can also add data fields to provide more information, such as which campaigns are generating new leads and which are launching a new product.

[Do More with Market Development Funds](#)

Market Development Funds have been enhanced this release. Use a custom lookup field to associate campaigns with budgets, extend the end date for when a fund is available, use field-level security to prevent partner users from updating status and amount fields, and create a workflow that updates the status or amount of a request or claim.

[Target Audiences Based on Their Channel Program or Level](#)

Create different versions of a page for different channel programs or levels with criteria fields to give each level a custom experience. You can also use the criteria fields to assign visibility to certain components or branding sets.


[Share Data with Channel Managers and Partner Users More Securely](#)

Members within a channel program or level no longer have visibility into others' accounts and opportunities. Although members can't see the data, channel managers still get the full picture by pulling the data into their reports and dashboards.

Empower External Delegated Admins to Manage Their Teams (Beta)

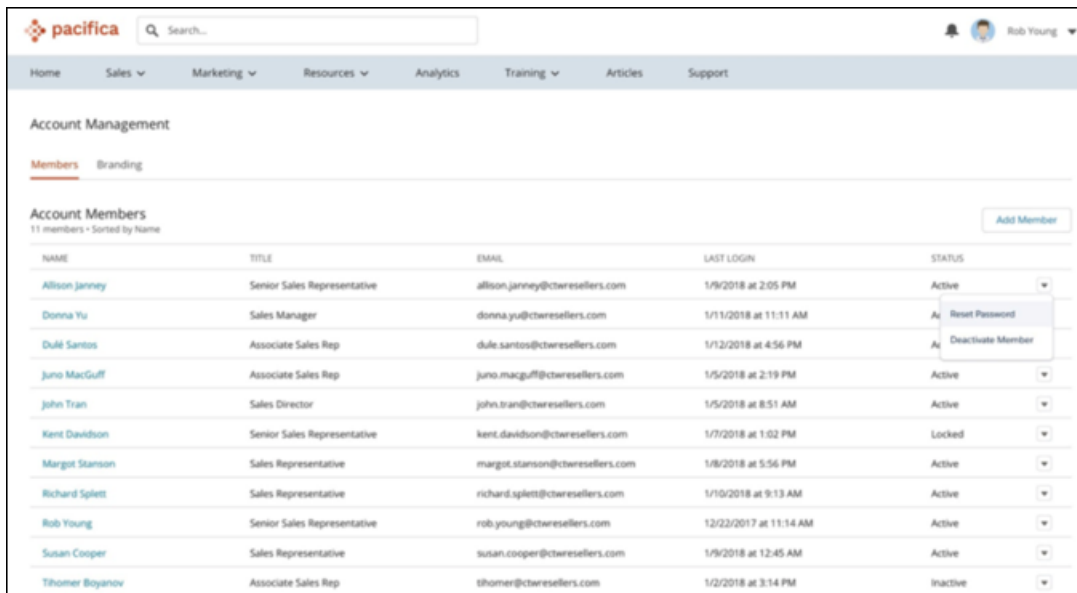
Help your delegated admins keep partner users moving forward with the Members page in Account Management. With just a few clicks, delegated admins can activate and deactivate members. They can also reset member passwords from the same page.

Where: This feature is available in Partner Central communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, the Members page is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply

equally to your use of this feature. You can provide feedback and suggestions for the Members page in the [Salesforce Partner Community group in the Trailblazer Community](#).

How: Click **Members**. You can deactivate, activate, or reset passwords for members in the Actions column.



NAME	TITLE	EMAIL	LAST LOGIN	STATUS
Allison Janney	Senior Sales Representative	allison.janney@ctwresellers.com	1/9/2018 at 2:05 PM	Active
Donna Yu	Sales Manager	donna.yu@ctwresellers.com	1/11/2018 at 11:11 AM	Active
Dulé Santos	Associate Sales Rep	dule.santos@ctwresellers.com	1/12/2018 at 4:56 PM	Active
Juno MacGuff	Associate Sales Rep	juno.macguff@ctwresellers.com	1/5/2018 at 2:19 PM	Active
John Tran	Sales Director	john.tran@ctwresellers.com	1/5/2018 at 8:51 AM	Active
Kent Davidson	Senior Sales Representative	kent.davidson@ctwresellers.com	1/7/2018 at 1:02 PM	Locked
Margot Stanson	Sales Representative	margot.stanson@ctwresellers.com	1/8/2018 at 5:56 PM	Active
Richard Splett	Sales Representative	richard.splett@ctwresellers.com	1/10/2018 at 9:13 AM	Active
Rob Young	Senior Sales Representative	rob.young@ctwresellers.com	12/22/2017 at 11:14 AM	Active
Susan Cooper	Sales Representative	susan.cooper@ctwresellers.com	1/9/2018 at 12:45 AM	Active
Thomer Boyanov	Associate Sales Rep	thomer@ctwresellers.com	1/2/2018 at 3:14 PM	Inactive

Let Delegated Admins Manage and Share Branding Assets (Beta)

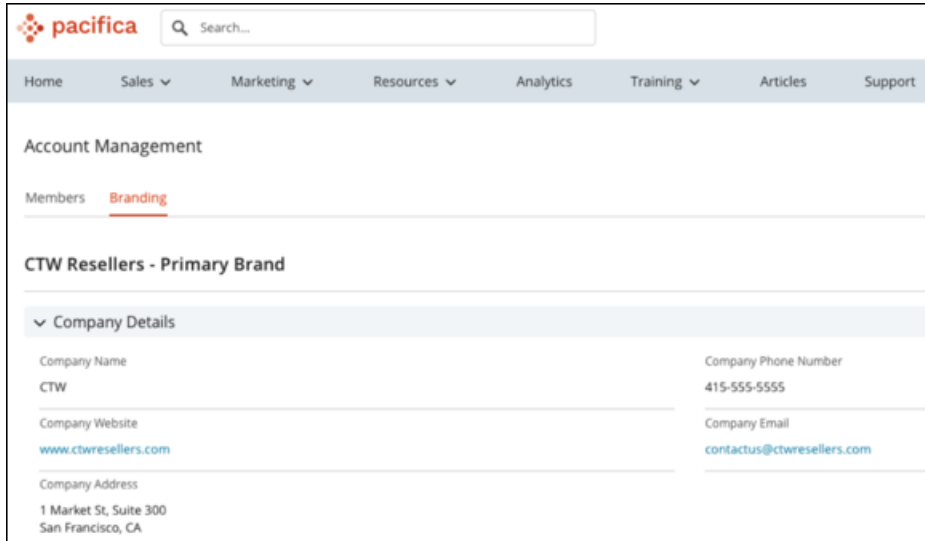
Delegated external admins can store partner branding assets on the Branding page. Channel managers can access this page to create co-branded emails, marketing campaigns, and websites. Partners can use information collected from the Branding page in partner-specific apps. For example, the Distributor Locator app can use information from the company details, such as addresses, websites, and contact info, to find distributors closest to them.

Where: This feature is available in Lightning and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Note: As a beta feature, the Branding page is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Branding page in the [Salesforce Partner Community group in the Trailblazer Community](#).

Who: External users with a partner license and delegated admin permissions have access to the Account Management page.

Partner users can view and manage branding information.



Give More Details with Campaign Marketplace (Generally Available)

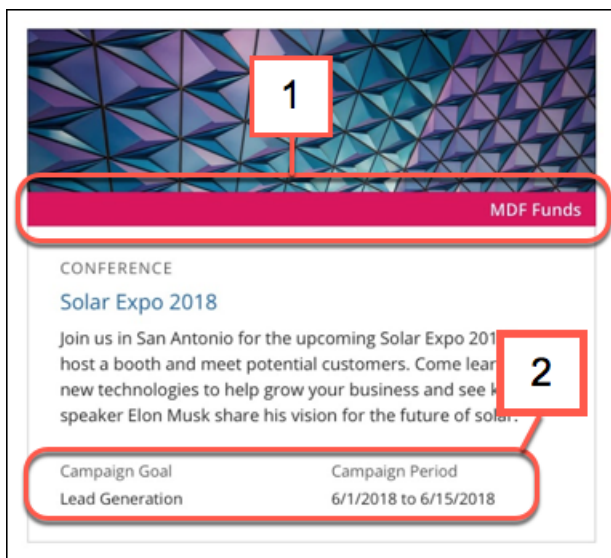
Channel managers can highlight a type of campaign to showcase important aspects and help partners quickly pinpoint what they're most interested in running. They can also add data fields to provide more information, such as which campaigns are generating new leads and which are launching a new product.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: Users with communities enabled and a partner license, or who are signed up for distributed marketing, can access this component in the Community Builder and Lightning App Builder.

What: Highlights (1) make it easy to spot all campaigns that have market development funds available.

Add data fields (2) to a campaign tile to give a user more information about the campaign.



SEE ALSO:

[Salesforce Help: Best Practices for Campaign Marketplace](#)(can be outdated or unavailable during release preview)

Do More with Market Development Funds

Market Development Funds have been enhanced this release. Use a custom lookup field to associate campaigns with budgets, extend the end date for when a fund is available, use field-level security to prevent partner users from updating status and amount fields, and create a workflow that updates the status or amount of a request or claim.

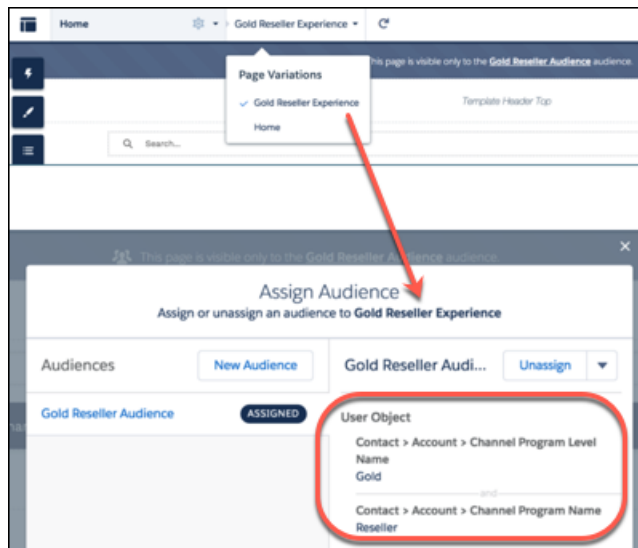
Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Target Audiences Based on Their Channel Program or Level

Create different versions of a page for different channel programs or levels with criteria fields to give each level a custom experience. You can also use the criteria fields to assign visibility to certain components or branding sets.

Where: This feature is available in Lightning and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

What: An admin can build a channel audience based on the channel partner's program and level.



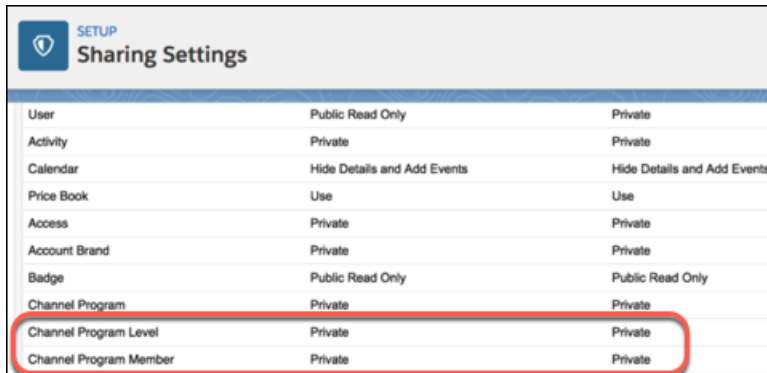
Share Data with Channel Managers and Partner Users More Securely

Members within a channel program or level no longer have visibility into others' accounts and opportunities. Although members can't see the data, channel managers still get the full picture by pulling the data into their reports and dashboards.

Where: This feature is available in Lightning and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Set organization-wide default to **Private** on Channel Program Level and Channel Program Member objects. Grant each partner user access to their individual level and member records.

An admin can control the org-wide default for channel programs and levels.



Object	Default Sharing Setting	Controlled Sharing Setting
User	Public Read Only	Private
Activity	Private	Private
Calendar	Hide Details and Add Events	Hide Details and Add Events
Price Book	Use	Use
Access	Private	Private
Account Brand	Private	Private
Badge	Public Read Only	Public Read Only
Channel Program	Private	Private
Channel Program Level	Private	Private
Channel Program Member	Private	Private

Files: Library Management and a New Files Detail Page

Customize libraries and files in your Communities to make them work for you. Bring your library tile components to life with images, reinforcing your brand and delighting your users. Add standard and custom fields to your file detail pages to track exactly what you need for your business.

IN THIS SECTION:

[Manage Libraries](#)

Creating, editing, deleting, and working in libraries is a whole lot simpler. As an administrator, you can update libraries in Lightning Experience. Users see library changes reflected in communities.

[Manage Library Membership \(Generally Available\)](#)

Update, add, delete, and track library members all from one place. You can even tell who's an internal or external user. As a library admin, you can create and manage library memberships from Files Home and users can see changes in their communities.

[Customize the Look of Libraries in Communities](#)

A picture is worth a thousand words. Use library branding to create custom library asset images in the library tile component in communities. If you choose not to add a custom image, the default library image appears on the library.

[File Detail Pages Enhance Community Files](#)

Do more with your community files with the new file detail page. When you share a file within the community using its unique URL, the files detail page serves as an information-rich landing page. Send authenticated community users right to the files detail page where they can download the file, see previous versions, and get file information. Customize the layout of your files detail pages by adding standard and custom fields that track metadata specific to your business.

[Preview Quip Documents and Sheets in Communities](#)

Starting with Summer '18, you can preview Quip documents and sheets just like other file type previews.

Manage Libraries

Creating, editing, deleting, and working in libraries is a whole lot simpler. As an administrator, you can update libraries in Lightning Experience. Users see library changes reflected in communities.

Where: This feature is available in Lightning Communities, accessed through Lightning Experience, and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to library administrators.

SEE ALSO:

[Manage Libraries in New Ways](#)

Manage Library Membership (Generally Available)

Update, add, delete, and track library members all from one place. You can even tell who's an internal or external user. As a library admin, you can create and manage library memberships from Files Home and users can see changes in their communities.

Where: This feature is available in Lightning communities, accessed through Lightning Experience. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available to library administrators.

SEE ALSO:


[Manage Library Membership from Files Home \(Generally Available\)](#)

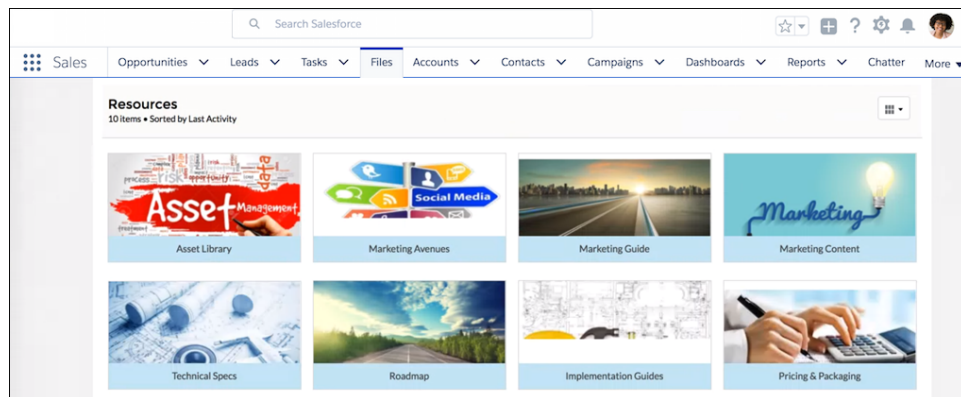
Customize the Look of Libraries in Communities

A picture is worth a thousand words. Use library branding to create custom library asset images in the library tile component in communities. If you choose not to add a custom image, the default library image appears on the library.

Where: This feature is available in Lightning communities, accessed through Lightning Experience, and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.


Why: You can change images at any time.

 **Note:** Branded library images are visible only in the desktop Communities Library component tile view. Depending on permissions, some external users can see library asset images, even if they're not library members. Choose images that you want everyone to see.



How: To show a library image in a community, upload it in a Lightning Experience–enabled Salesforce org. For best results, choose an image with a 16:9 aspect ratio (for example, 480 pixels by 270 pixels).

If you don't add a custom image, the default library illustration appears on the library.

 **Note:** Administrators can switch off branding for their communities from the builder.

SEE ALSO:

[Customize Community Libraries with Images](#)

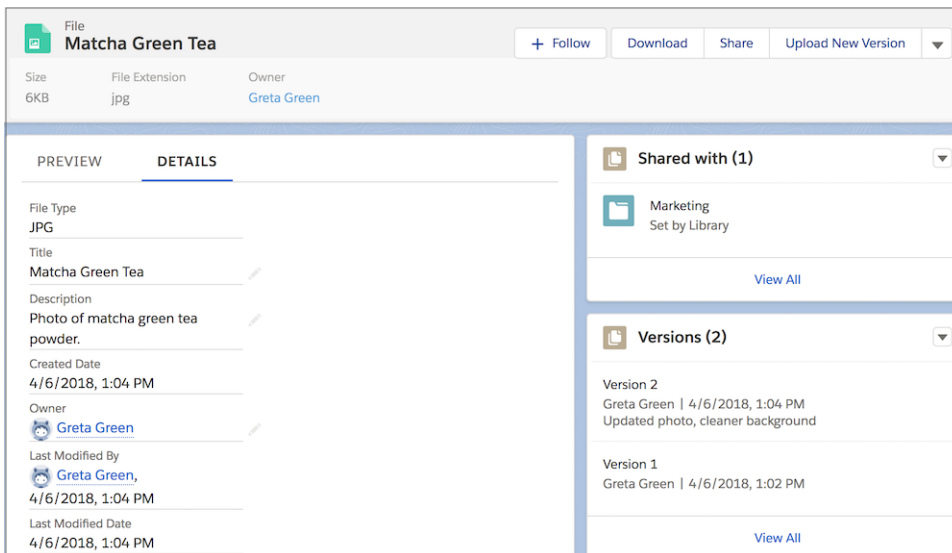
File Detail Pages Enhance Community Files

Do more with your community files with the new file detail page. When you share a file within the community using its unique URL, the files detail page serves as an information-rich landing page. Send authenticated community users right to the files detail page where they can download the file, see previous versions, and get file information. Customize the layout of your files detail pages by adding standard and custom fields that track metadata specific to your business.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: The standard fields provide information about file size, type, and creator. Create custom fields for whatever you need—add product information to spec sheets, or identify files for different business units or stages of the sales process. You can also use this data when running file searches and reports. Tidy up your community libraries by running reports on files based on publish date, last updated date, or number of downloads.


Users can also follow the file from the files detail page, which is a new Communities feature.



The screenshot shows the file detail page for a file named "Matcha Green Tea". At the top, there are action buttons: "+ Follow", "Download", "Share", and "Upload New Version". Below these, a table lists file metadata: Size (6KB), File Extension (jpg), and Owner (Greta Green). The main content area is split into two columns. The left column has tabs for "PREVIEW" and "DETAILS", with "DETAILS" selected. It lists fields for File Type (JPG), Title (Matcha Green Tea), Description (Photo of matcha green tea powder), Created Date (4/6/2018, 1:04 PM), Owner (Greta Green), Last Modified By (Greta Green), and Last Modified Date (4/6/2018, 1:04 PM). The right column has sections for "Shared with (1)" showing a "Marketing" library and "Versions (2)" showing two versions of the file, with the most recent being Version 2, updated on 4/6/2018 at 1:04 PM.

How: To edit file detail pages from Setup, choose **Content Version** from the Object Manager in Lightning Experience. In Classic, search Setup for *Content Version Page Layout*.

You can view file detail pages from a file preview or from the actions menu on Files home, in the feed, or on a record.

 **Important:** The community admin must republish the community for the custom file detail page to appear. Until the community is republished, only the standard record detail page is available.


Preview Quip Documents and Sheets in Communities

Starting with Summer '18, you can preview Quip documents and sheets just like other file type previews.

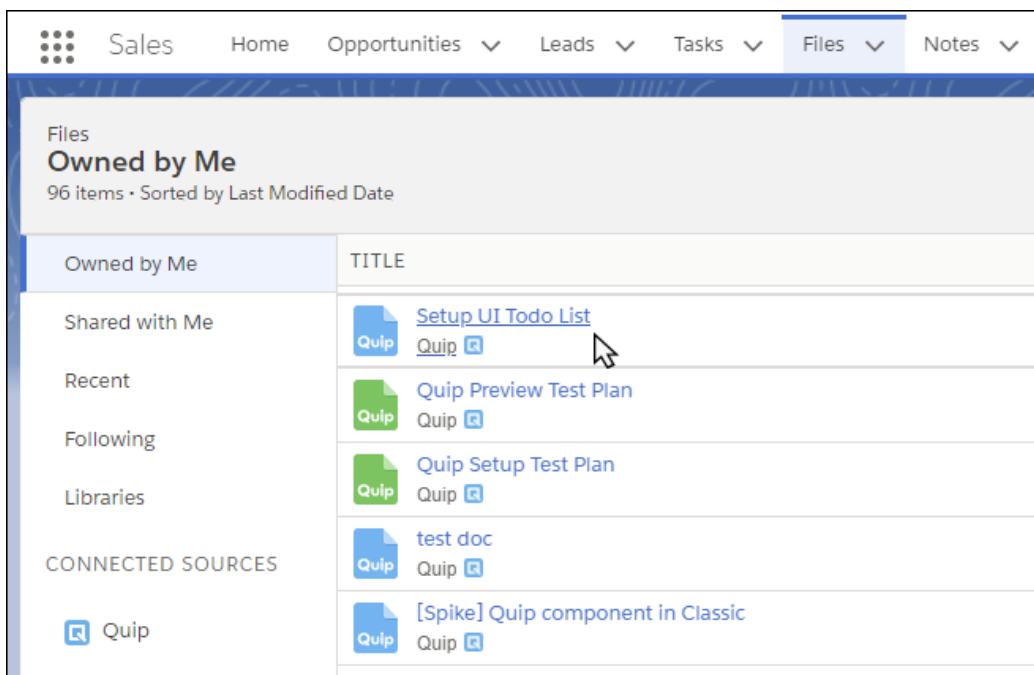
Where: This feature is available in Lightning communities, accessed through Lightning Experience, and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Until now, users who wanted to preview Quip saw a "Preview not available" message in the place of a preview for Quip documents and sheets. Now, previews are available:

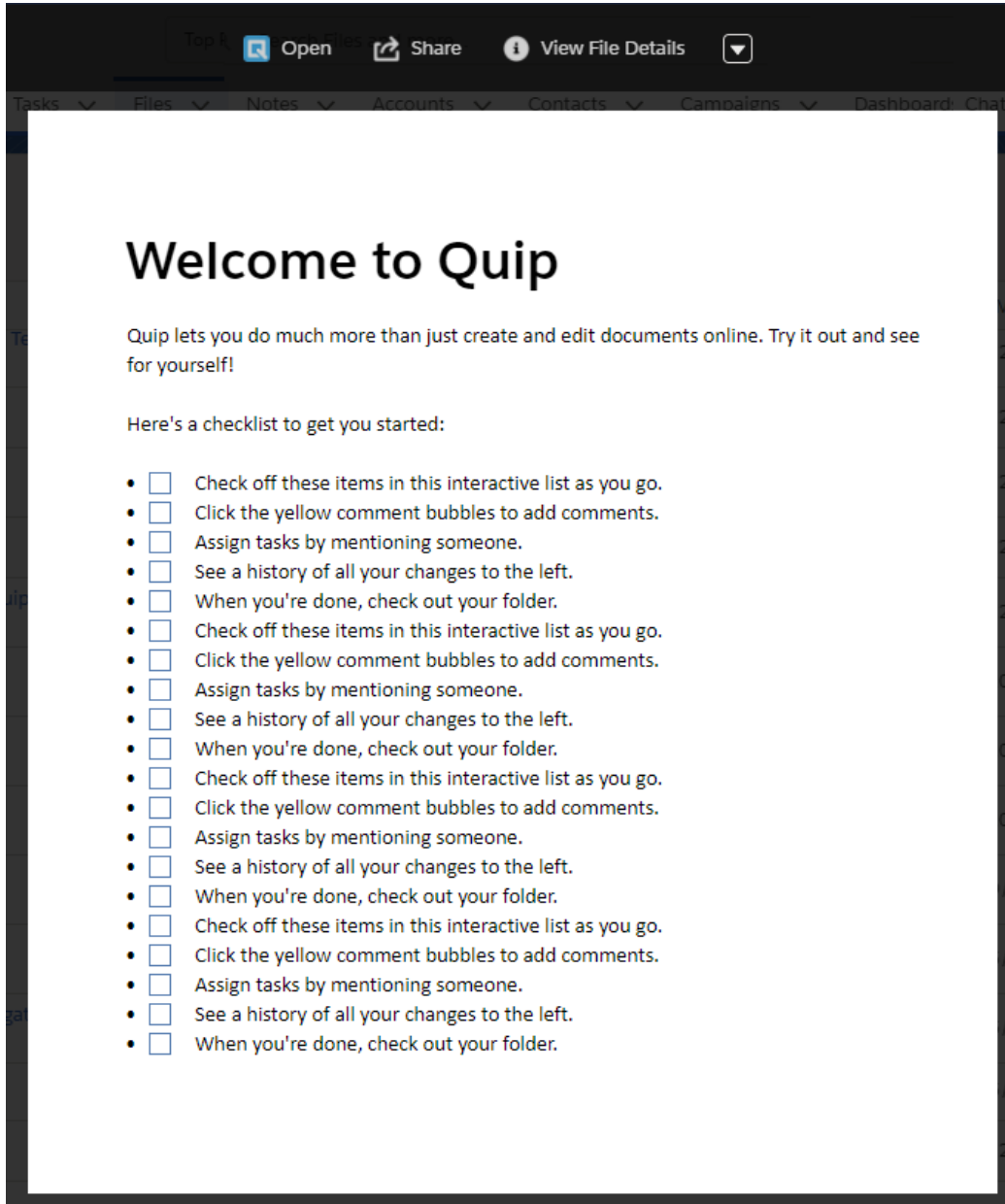
- When you click an attached Quip document in a Chatter feed.
- On the File Details page.
- From Files Home.
- From the Notes and Attachments component.

 **Note:** On the File Details page, only the first page of a preview is shown.

How: Click a Quip file to see its preview. From there, choose an action: Open, share, or View File Details.



From there, choose an action: Open, Share, or View File Details.



Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

IN THIS SECTION:

[Let Community Members Author Knowledge Articles](#)

Your community members are knowledgeable folks, so give them the power to help others by writing or revising knowledge articles with the API. You can now give read, create, edit, and delete permissions to community members with any community license type.

[Customize Lockout Email Templates](#)

Make your lockout email templates match your company's brand. Customers receive a lockout email when they've made too many unsuccessful login attempts and have been locked out. You can customize the default template's content and use the formula to communicate next-step instructions to customers, such as when to try again to access their account.

[Assess a Customer's Mood on Support Calls with Community 360 \(Pilot\)](#)

With Sentiment Analysis (Pilot) in the Community 360 component, service agents see a positive or negative icon at the top of the console to capture the customer's mood at a glance. The mood is calculated based on the customer's recent posts in the community. The sentiment information helps agents gauge levels of interest in other products or the need to tread carefully.

[See Activity on More Objects and Add Record Filters in Community 360](#)

In addition to article and discussion activity, support agents can now view community activity on these objects: assets, contracts, custom objects, orders, products, and tasks. Agents can see if a customer has looked at any of these items before calling support. This knowledge helps agents give more relevant information, save customer and company time, and close cases faster.

[Community Case Deflection Dashboard Removed From Community Management Package](#)

We've removed the Community Case Deflection Dashboard, and all its corresponding reports, from the Salesforce Community Management Package on the AppExchange. We're releasing a new AppExchange package with the dashboard and its reports, independent from the Salesforce Community Management Package, after the release of Summer '18.

[Edit Self-Service User Permission Is Manage Customer Users](#)

The "Edit Self Service User" permission is now named "Manage Customer Users". The functionality remains the same, but the permission is no longer enabled by default for new standard profiles.

[Secure Topics for Salesforce Sites and Portals \(Critical Update\)](#)

Topic names are exposed to all users in your org, including users in your org's Salesforce Sites and Portals created before Summer '13. For enhanced security of topics, we're turning off topics for guest and authenticated external users in Salesforce Sites and Portals.

Let Community Members Author Knowledge Articles

Your community members are knowledgeable folks, so give them the power to help others by writing or revising knowledge articles with the API. You can now give read, create, edit, and delete permissions to community members with any community license type.

Where: You can change permissions in Salesforce Setup using either Lightning Experience or Salesforce Classic.

How: To let community users write knowledge articles, select **Knowledge User** on their user detail page. Give the correct permissions on the article type by either using a custom profile or creating a permission set.

Members of communities built with Salesforce Tabs + Visualforce can author articles using the Salesforce Knowledge authoring interface. In Lightning communities, build a custom component to allow your community members to author articles with the API.

SEE ALSO:

[Salesforce Help: Knowledge User Access \(can be outdated or unavailable during release preview\)](#)

Customize Lockout Email Templates

Make your lockout email templates match your company's brand. Customers receive a lockout email when they've made too many unsuccessful login attempts and have been locked out. You can customize the default template's content and use the formula to communicate next-step instructions to customers, such as when to try again to access their account.

Where: This feature is available in all communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

The message the customer receives is calculated based on their password policy settings.

```

Hello {!Receiving_User.FirstName},

We received your request to reset your {!Community_Name} password. We can't reset your password right now. Your account is locked after too many login attempts.

{!CASE(1,
IF(VALUE(PASSWORD_LOCK_TIME) > 0, 1, 0), "Try again in " + PASSWORD_LOCK_TIME + " minutes.",
IF(VALUE(PASSWORD_LOCK_TIME) < 0, 1, 0), "Contact your " + Community_Name + " administrator to unlock your account.",
"")}

If you didn't request a password reset or haven't tried to log in to your account recently, contact your
{!Community_Name} administrator or reply to this email.

Thank you,
{!Community_Name}

```

How: In **Setup**, enter *templates* in the Quick Find box. Click **Email Templates**, and look for **User Lockout**.


SEE ALSO:

[Salesforce Help: Customize Email Sent From Communities](#)(can be outdated or unavailable during release preview)

Assess a Customer's Mood on Support Calls with Community 360 (Pilot)

With Sentiment Analysis (Pilot) in the Community 360 component, service agents see a positive or negative icon at the top of the console to capture the customer's mood at a glance. The mood is calculated based on the customer's recent posts in the community. The sentiment information helps agents gauge levels of interest in other products or the need to tread carefully.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

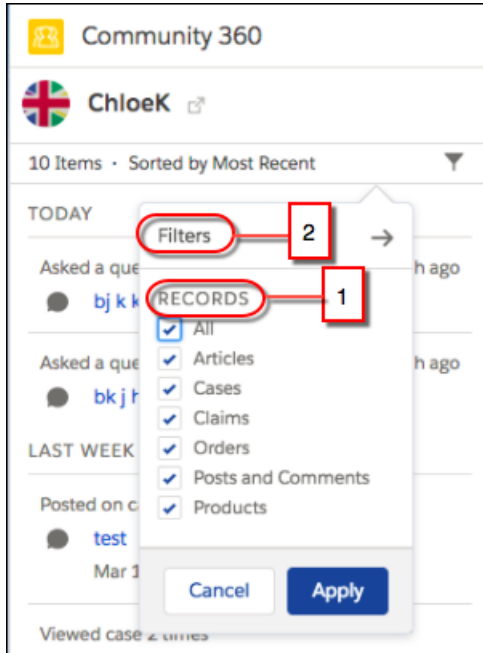
 **Note:** We provide Sentiment Analysis to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Sentiment Analysis 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.

See Activity on More Objects and Add Record Filters in Community 360

In addition to article and discussion activity, support agents can now view community activity on these objects: assets, contracts, custom objects, orders, products, and tasks. Agents can see if a customer has looked at any of these items before calling support. This knowledge helps agents give more relevant information, save customer and company time, and close cases faster.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Filtering of objects is available only in Lightning Experience.

How: If you have assets, orders, or products already set up in your org and are using Community 360, your support agents automatically see community activity on these objects (1). You can filter activity by the records you want to see (2).



Community Case Deflection Dashboard Removed From Community Management Package

We've removed the Community Case Deflection Dashboard, and all its corresponding reports, from the Salesforce Community Management Package on the AppExchange. We're releasing a new AppExchange package with the dashboard and its reports, independent from the Salesforce Community Management Package, after the release of Summer '18.

Where: This change applies to the Salesforce Community Management Package on the AppExchange.

Edit Self-Service User Permission Is Manage Customer Users

The "Edit Self-Service User" permission is now named "Manage Customer Users". The functionality remains the same, but the permission is no longer enabled by default for new standard profiles.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: The Manage Customer User permission is available only to Customer Community, Partner Community, and Customer Community Plus users.

Important: In Winter '19, this permission will be removed from all standard profiles. You can create a permission set granting the "Manage Customer Users" permission to users who manage customer users and assign it to their profiles.

Secure Topics for Salesforce Sites and Portals (Critical Update)

Topic names are exposed to all users in your org, including users in your org's Salesforce Sites and Portals created before Summer '13. For enhanced security of topics, we're turning off topics for guest and authenticated external users in Salesforce Sites and Portals.

Where: This change applies to Salesforce Sites in Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. This change also applies to Portals created before Summer '13 in Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions. This change doesn't apply to communities and portals created after Summer '13.

When: This critical update is enforced on August 26, 2018.

How: After activation if you want guest and authenticated external users in Salesforce Sites and Portals to have access to topics, enter *Chatter* in the Quick Find box in Setup. Select Chatter Settings, and in the Topics section select **Allow topics in Salesforce Sites and Portals**.

Chatter: Trailhead Badges on User Profiles, Record Links in Posts and Comments, Pinned Posts and Community Streams Generally Available

Your users can now see earned Trailhead badges on their profile pages. You can link to any type of record that is available in your org from a post or comment. Pinned posts and cross-community streams are now generally available.

IN THIS SECTION:

[User Profiles and Feeds: Trailhead Badges on Profiles, Record Links in Posts and Comments, Pin Post and Cross-Community Streams Generally Available](#)

User profile pages now show the Trailhead badges that a user has earned. Your users can easily link to any type of record enabled in your org in a post or comment. Pin up to three posts to the top of a group or topic feed. Both pin posts and cross-community streams are now generally available.

[Other Changes in Chatter](#)

Learn about other changes that improve your experience with Chatter.

User Profiles and Feeds: Trailhead Badges on Profiles, Record Links in Posts and Comments, Pin Post and Cross-Community Streams Generally Available

User profile pages now show the Trailhead badges that a user has earned. Your users can easily link to any type of record enabled in your org in a post or comment. Pin up to three posts to the top of a group or topic feed. Both pin posts and cross-community streams are now generally available.

IN THIS SECTION:

[Show Your Trailhead Badges in Your Profile](#)

Now you have a ready view of your accomplishments. Your user profile shows the Trailhead badges you've earned. It's a great way to show off all your hard work and expertise.

[Link to Your Most Relevant Records from a Post or Comment](#)

You're posting about a group of related records. It certainly would be convenient if you could easily link to the records as you write your post. Now you can! Enter a forward slash (/), and type the record name. You can link to any record type that's enabled for your org, such as work records, accounts, opportunities, and cases. Link to up to 25 records in each post or comment.

[Pin Posts to Feeds \(Generally Available\)](#)

Put vital information front and center by pinning important posts to the top of group and topics feeds. Now that post pinning is generally available, we boosted the number of posts you can pin to three.

[Check Community Streams Without Switching Context \(Generally Available\)](#)

When you're taking care of business in Lightning Experience, you can quickly check on your communities without switching context. Accessing community streams in Lightning Experience is now generally available.

Show Your Trailhead Badges in Your Profile

Now you have a ready view of your accomplishments. Your user profile shows the Trailhead badges you've earned. It's a great way to show off all your hard work and expertise.

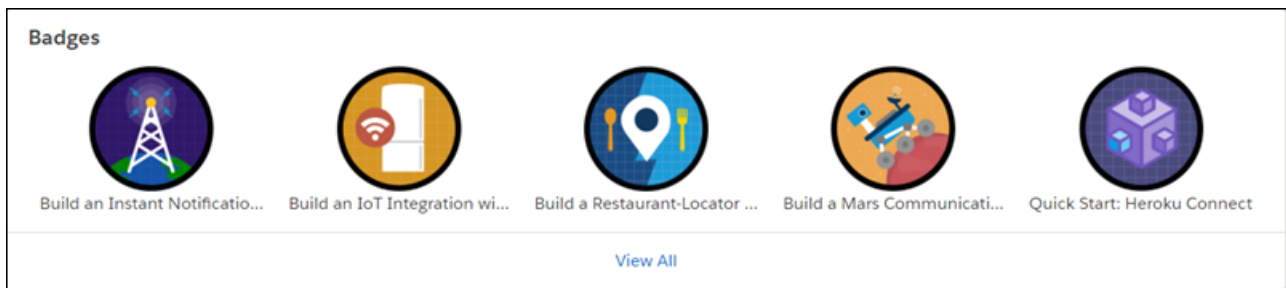
Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: The compact view shows three Trailhead badges, and the full view shows five. Click **View All** to go to your Trailhead profile page and see all your earned Trailhead badges.

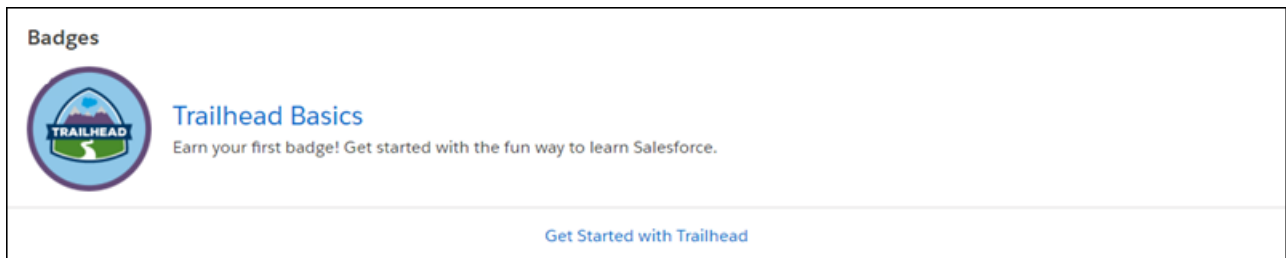
 **Note:** If users prefer not to show their Trailhead badges, they can go to their Trailhead account and set their profile to private.

What you see in the Badges component depends on a few things. For example, does the user have a Trailhead account? Has the user earned any Trailhead badges? Is the user's Trailhead account public or private? Here are a few scenarios that illustrate when different views are shown.

In your own view, you always see the Trailhead badges you've earned whether your Trailhead account is public or private.

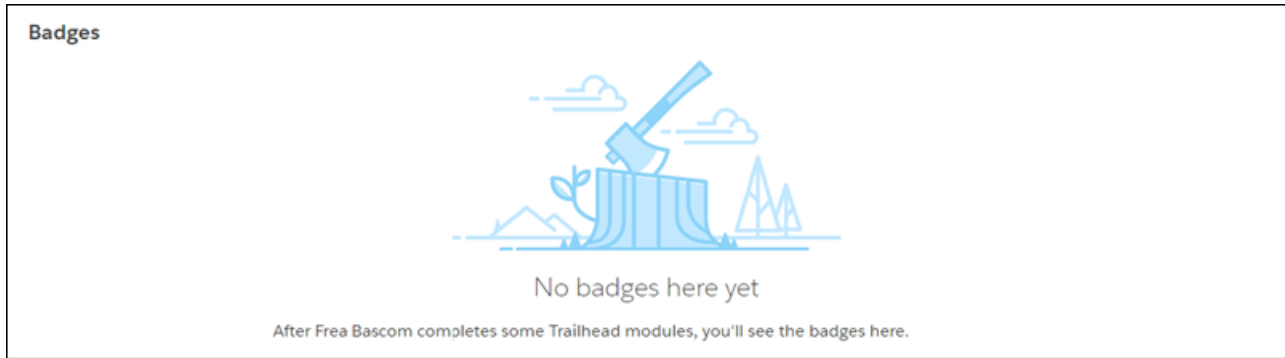


If you don't have a Trailhead account or have an account but no Trailhead badges, a link to Trailhead Basics starts you on your way.

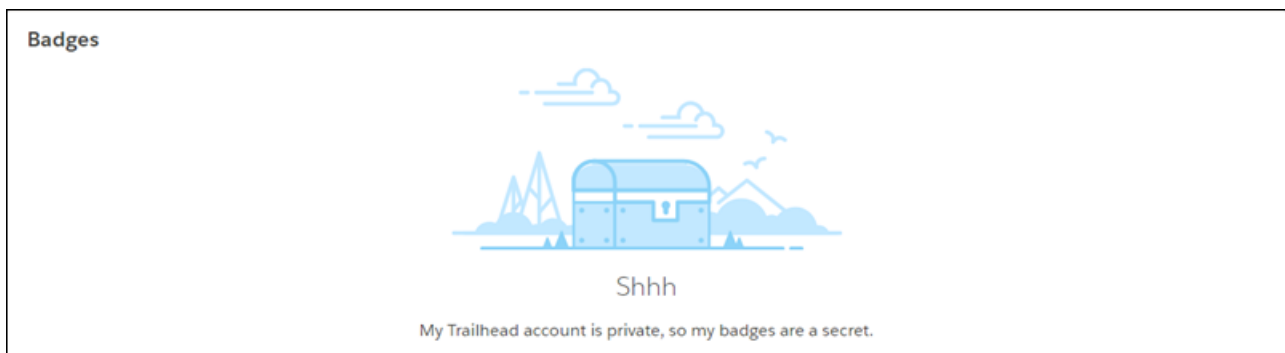


 **Tip:** If you don't have a Trailhead account, you can sign up at <https://trailhead.salesforce.com/modules?modal=signup>.

When you look at the profile of another person who doesn't have a Trailhead account or has no Trailhead badges, you see an empty-state message.



If the user's Trailhead account is private, the Badges component shows respect.



How: You get the Badges feature automatically in your Salesforce org. The Badges component is also available in the Lightning App Builder. Use it to add the Badges component to your custom pages.

Link to Your Most Relevant Records from a Post or Comment

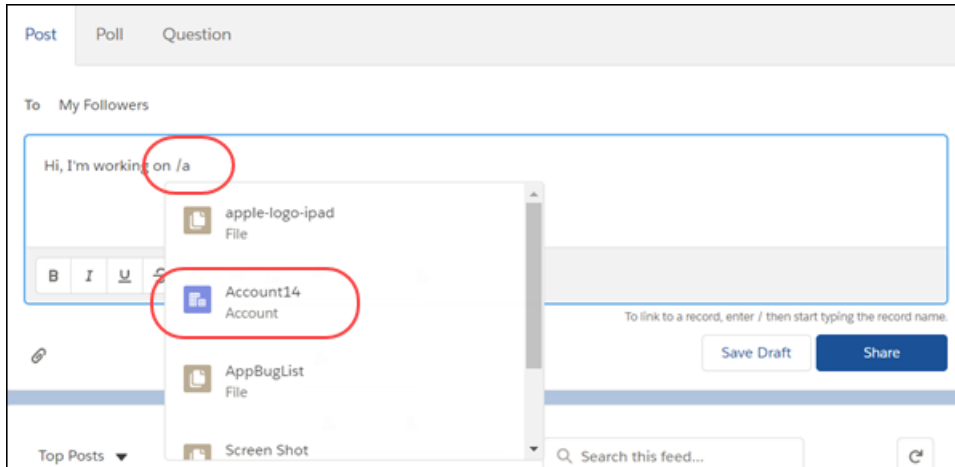
You're posting about a group of related records. It certainly would be convenient if you could easily link to the records as you write your post. Now you can! Enter a forward slash (/), and type the record name. You can link to any record type that's enabled for your org, such as work records, accounts, opportunities, and cases. Link to up to 25 records in each post or comment.

Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

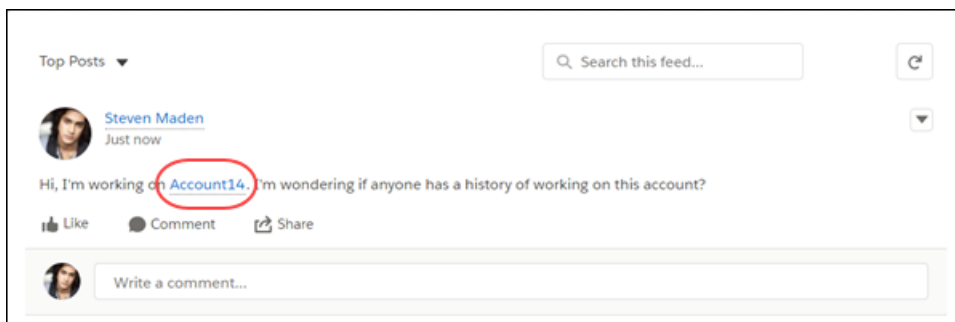
How: Before you can link to records from a post or comment, you must contact Salesforce Support. Ask them to enable the Quill editor and set it up for composing Rich Text content in Chatter.

When your org is set up for record linking, you can link to records from a post, comment, and a question detail. You can't link from the question itself.

Let's link to an account named *Account14*. In a post, enter `/a` to see a list of matches.



Make your selection, then post.



When you publish, the record name appears as a link to the people who have access to the record. The people who don't have access see a Record Not Available message.

[Chatter REST API](#) and [Chatter in Apex](#) support linking to records from posts and comments.

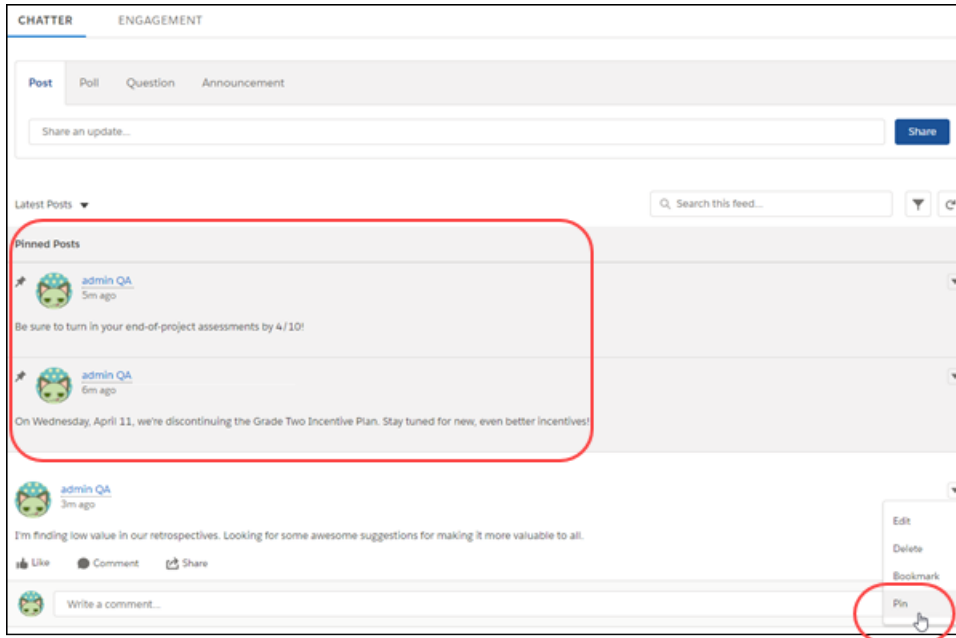
Pin Posts to Feeds (Generally Available)

Put vital information front and center by pinning important posts to the top of group and topics feeds. Now that post pinning is generally available, we boosted the number of posts you can pin to three.

Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Admins can enable post pinning and assign pinning permission through Setup. When post pinning is enabled, admins and group owners and managers can pin posts. Other users can pin posts after you have assigned them permission.

Why: Increase post visibility with pinned posts. Pin up to three posts to the top of group and topics feeds.



How: In your org, go to **Setup > Chatter Settings** and select **Allow post pinning**. After you enable post pinning for your org, admins, group owners, and group managers can pin posts. You can also assign the Pin Posts in Feeds permission to selected users. Assign post pinning permission in Setup through user profiles and permission sets.

SEE ALSO:

[Salesforce Help: Assign Post Pinning Permission \(can be outdated or unavailable during release preview\)](#)

Check Community Streams Without Switching Context (Generally Available)

When you're taking care of business in Lightning Experience, you can quickly check on your communities without switching context. Accessing community streams in Lightning Experience is now generally available.

Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Lightning communities in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Check Community Streams Without Leaving Salesforce \(Generally Available\)](#)

Other Changes in Chatter

Learn about other changes that improve your experience with Chatter.

IN THIS SECTION:

[Empty-State Messages Are Less Empty](#)

It's the little things that can make your day, like updated empty-state messages. To see an empty-state message, navigate to a page that doesn't have any data. For example, go to a group list page that has no listed groups. We hope you agree that our new look cheers the place up.

[Salesforce Classic Chatter Splash Screen Is Retired](#)

As adoption of Lightning Experience takes hold, we're doing some house cleaning. We removed the onboarding splash screen that you would see when first visiting the Chatter home page or the Home page in Salesforce Classic. Now new users see these pages without the splash like everyone else.

[Chatter Desktop Is Being Retired in Summer '18](#)

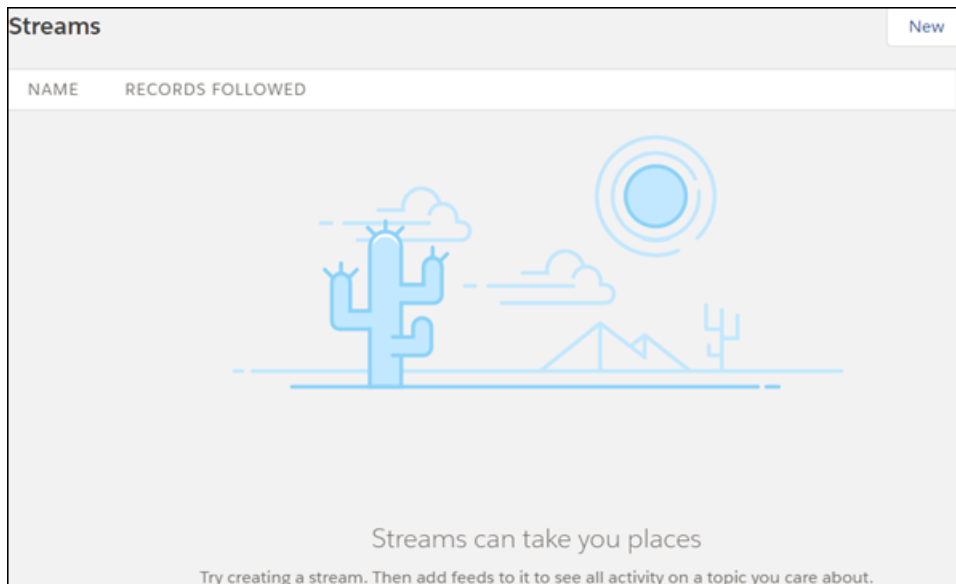
Chatter Desktop is retiring in June 2018. After the feature is retired, users can't access Chatter or receive updates through the desktop client. You can still access Chatter from your browser.

Empty-State Messages Are Less Empty

It's the little things that can make your day, like updated empty-state messages. To see an empty-state message, navigate to a page that doesn't have any data. For example, go to a group list page that has no listed groups. We hope you agree that our new look cheers the place up.

Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Here's one of the new messages.



Salesforce Classic Chatter Splash Screen Is Retired

As adoption of Lightning Experience takes hold, we're doing some house cleaning. We removed the onboarding splash screen that you would see when first visiting the Chatter home page or the Home page in Salesforce Classic. Now new users see these pages without the splash like everyone else.

Where: This feature is available in Salesforce Classic in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Chatter Desktop Is Being Retired in Summer '18

Chatter Desktop is retiring in June 2018. After the feature is retired, users can't access Chatter or receive updates through the desktop client. You can still access Chatter from your browser.

Where: This change applies to Salesforce Classic in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

For more information, see [Chatter Desktop Retirement](#).

Files: Library Management Updates, Topics on Files, and Quip Lightning Component

A smoother files workflow is here. Manage libraries right from Lightning Experience, including the power to update membership and delete empty libraries. Pop the Quip Lightning component onto records to let your users access Quip right from the record. Curate your files with topics, and find recently viewed files in a jiffy in the recent files dropdown.

IN THIS SECTION:

[Manage Libraries in New Ways](#)

Administrators can now update libraries in Lightning Experience and manage libraries from the top level. Every library you create is automatically structured in a folder. Library creators have administrator permissions to help keep libraries current and relevant.

[Manage Library Membership from Files Home \(Generally Available\)](#)

Update, add, delete, and track library members all from one place. Library admins can create and manage library memberships from Files Home. External users automatically get an “external badge” in the Current Member section to identify external partners, customer community members, portal, and Chatter users.

[Find Files Fast with the Recent Files Dropdown](#)

The recent files dropdown is a little change with big-time savings. Instead of digging through files to find the ones you work with most, click the Recent Files dropdown on the top menu.

[Manage Files Topics from the File Detail Page](#)

The file detail page just got even better—now you can manage topics for your files right from the detail page. Use topics to find files more easily and connect them to other records.

[Enjoy Updated File Previews in Salesforce Classic](#)

File previews in Salesforce Classic now load faster and render beautifully on high-resolution monitors. We’re bringing the elegant file preview experience you love in Lightning Experience to Salesforce Classic. You can preview your files in full screen without downloading them. And now that the previews use HTML5, you no longer need Adobe Flash Player.

[Resolve Issues with Scanned PDF Previews](#)

Have you had trouble with previews of scanned or compressed PDF files? Now you can switch your previews to use another file type to resolve the issue. By default, file previews are SVGs, a file format that displays well on high-resolution monitors. In some orgs, SVG file previews of scanned PDFs are not rendering completely or at full size. Salesforce has created a preference that lets you change the preview file type from SVG to JPG.

[Access Quip Files](#)

Add the Quip Lightning component to pages to give people easy access to their Quip files. Users can collaborate on accounts, opportunities, leads, and most other standard or custom objects. With Quip files handy, users don’t need to switch back and forth to get the information they need and use most. Recent files appear right in the component.

[Preview Quip Documents and Sheets](#)

Preview Quip documents and sheets just like other file type previews. Previews are available on the Files Details page, from Files Home, from the Notes and Attachments component, and when you click an attached Quip document in a Chatter feed.

[Other Changes in Files](#)

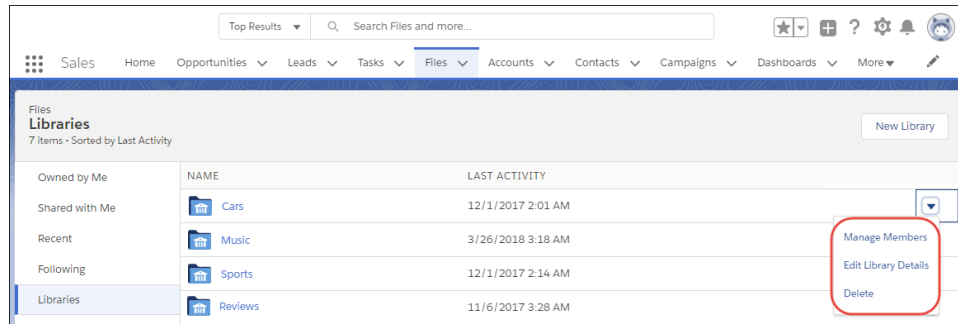
Learn about feature retirements and smaller changes that improve your files experience.

Manage Libraries in New Ways

Administrators can now update libraries in Lightning Experience and manage libraries from the top level. Every library you create is automatically structured in a folder. Library creators have administrator permissions to help keep libraries current and relevant.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: Need to change a library? You can get to the Libraries filter from Files Home.



Manage libraries from the dropdown menu next to each library.

To create a library, click **New Library**. When you create or edit a library, you can also add a custom library tile image.

Note: With great delete powers come great delete responsibilities: Only empty libraries can be deleted. Delete files first and then delete the library. If you delete the files and still have trouble deleting the library, empty your recycle bin.

SEE ALSO:

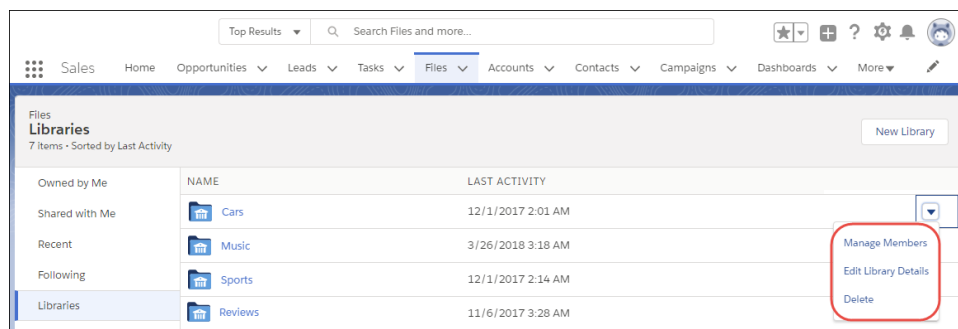
[Manage Library Membership from Files Home \(Generally Available\)](#)

Manage Library Membership from Files Home (Generally Available)

Update, add, delete, and track library members all from one place. Library admins can create and manage library memberships from Files Home. External users automatically get an "external badge" in the Current Member section to identify external partners, customer community members, portal, and Chatter users.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions.

Why:



- Add and remove users and public groups to and from libraries
- Edit library details
- Delete a library

How: From the libraries top level, click the dropdown next to a library, and choose an action.

SEE ALSO:

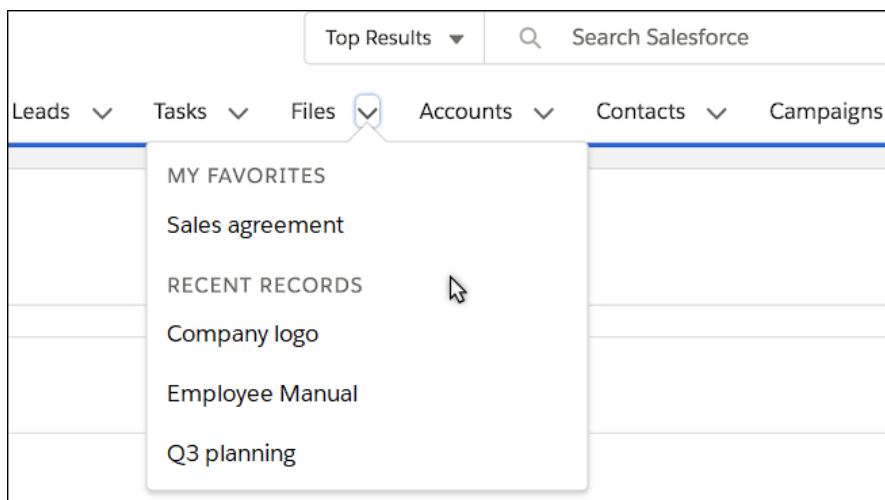
[Manage Libraries in New Ways](#)

Find Files Fast with the Recent Files Dropdown

The recent files dropdown is a little change with big-time savings. Instead of digging through files to find the ones you work with most, click the Recent Files dropdown on the top menu.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Why: The dropdown shows the three most recently accessed files. Files marked as favorites also appear in the dropdown, so they're always only one click away.

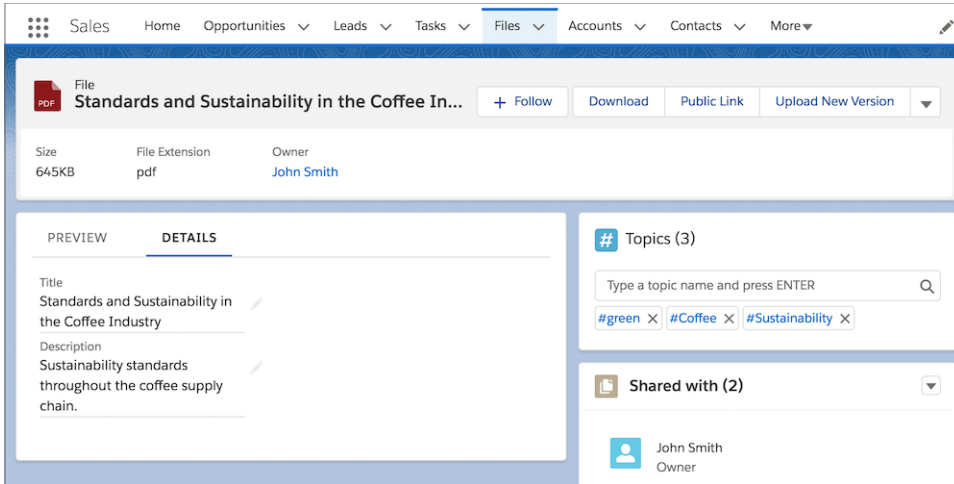


Manage Files Topics from the File Detail Page

The file detail page just got even better—now you can manage topics for your files right from the detail page. Use topics to find files more easily and connect them to other records.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: From the app builder, drag the topics component onto the file detail page and publish the page.



SEE ALSO:

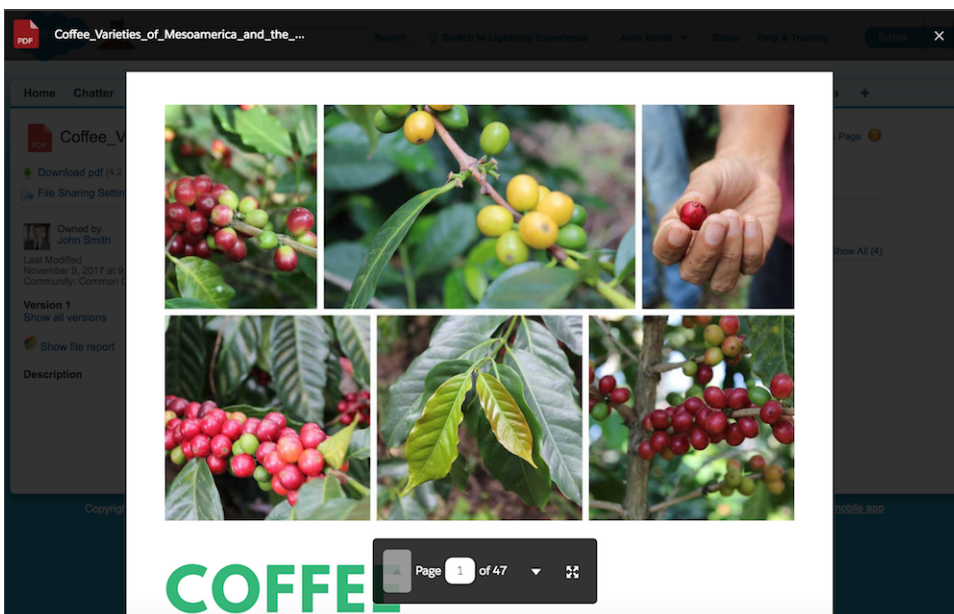
[Organize Records with Topics](#)

Enjoy Updated File Previews in Salesforce Classic

File previews in Salesforce Classic now load faster and render beautifully on high-resolution monitors. We're bringing the elegant file preview experience you love in Lightning Experience to Salesforce Classic. You can preview your files in full screen without downloading them. And now that the previews use HTML5, you no longer need Adobe Flash Player.

Where: This change applies to Salesforce Classic in all editions, except Personal Edition.

How: Click the thumbnail preview from the file detail page to launch the file preview player.



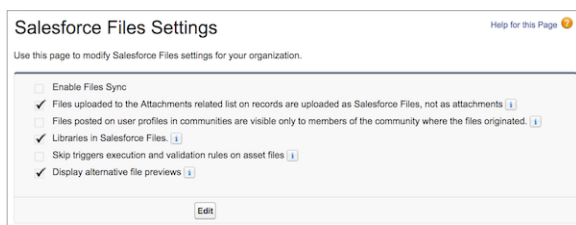
Resolve Issues with Scanned PDF Previews

Have you had trouble with previews of scanned or compressed PDF files? Now you can switch your previews to use another file type to resolve the issue. By default, file previews are SVGs, a file format that displays well on high-resolution monitors. In some orgs, SVG file previews of scanned PDFs are not rendering completely or at full size. Salesforce has created a preference that lets you change the preview file type from SVG to JPG.

Note: You should display alternative previews **only** if your users have had trouble with scanned or compressed PDF previews. For starters, SVG previews look better on high-res devices. And if you enable alternative previews, all existing file previews have to be produced again, which causes delays for users. We recommend the default settings unless you've had issues.

Where: This feature is available in Lightning Experience in all editions, except Personal Edition.

How: See the new preference in the Setup menu under Files Settings. Select **Display alternative file previews** to enable.

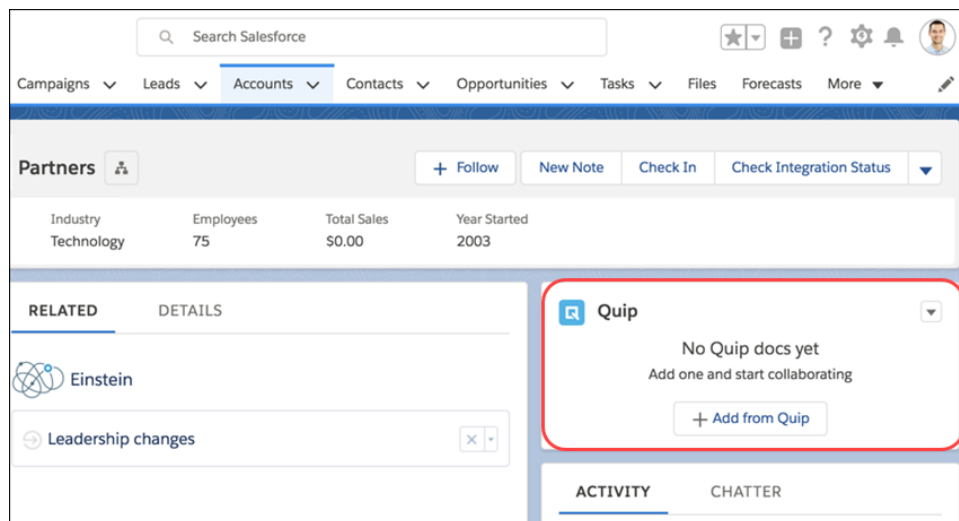


Access Quip Files

Add the Quip Lightning component to pages to give people easy access to their Quip files. Users can collaborate on accounts, opportunities, leads, and most other standard or custom objects. With Quip files handy, users don't need to switch back and forth to get the information they need and use most. Recent files appear right in the component.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

Why: The Quip Lightning Component makes it easier to review and edit Quip docs and sheets. Links to the Quip app or mobile experiences offer a smooth transition from previewing to collaborating.



How: Add the Quip component through the Lightning App Builder.

SEE ALSO:

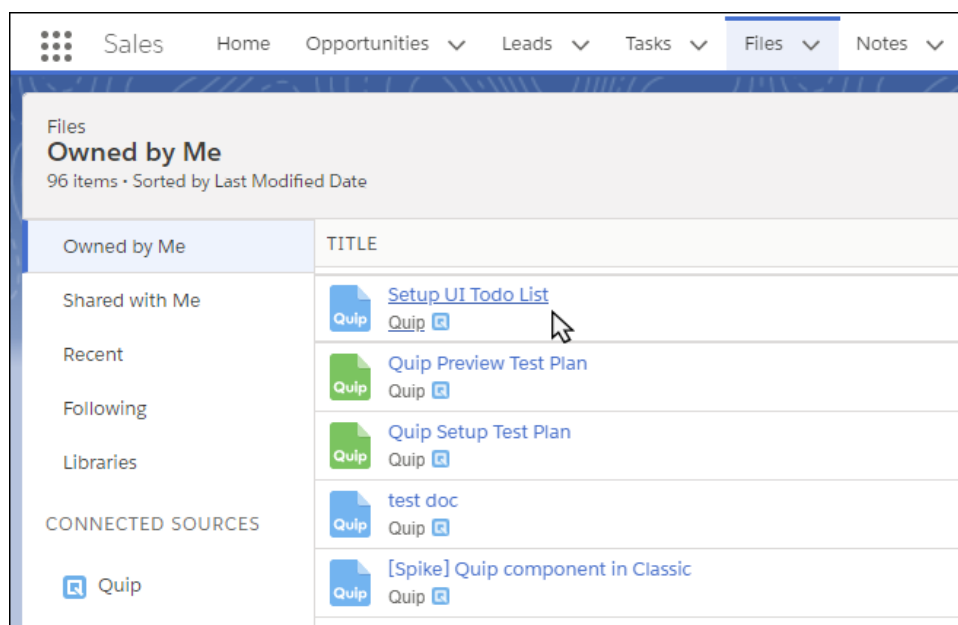
[Add the Quip Lightning Component](#)


Preview Quip Documents and Sheets

Preview Quip documents and sheets just like other file type previews. Previews are available on the Files Details page, from Files Home, from the Notes and Attachments component, and when you click an attached Quip document in a Chatter feed.

Where: This change applies to Lightning Experience and the Salesforce app in Professional, Enterprise, Performance, and Unlimited editions.

How: Click a Quip file to see its preview. From there, choose an action: Open, Share, or view File Details.



 **Note:** On the File Details page, only the first page of a preview is shown.

Other Changes in Files

Learn about feature retirements and smaller changes that improve your files experience.

IN THIS SECTION:

[Keep All Attached Files When Merging Records](#)

Cleaning up duplicate records? Now you can merge records without worrying about losing files—all files from both records are brought into the new master record. Previously, when records were merged, the merged record did not always retain all files.

[Include File Links in Weekly Data Export](#)

Use the ContentDocumentLink object data to see how Salesforce files are shared. Armed with this data, you can audit who has access to files and troubleshoot links created by automated systems. Exported file links can also assist with data migrations, data integrations, and provide more thorough backup and restore.

[Prepare to Bid Farewell to Flash](#)

Several files features that used to run on Adobe Flash Player in Salesforce Classic now use HTML5. Flash will be completely retired in Salesforce by Spring '19. Adobe plans to stop supporting the Flash player by 2020, and several browsers currently block Flash.

[Files Connect for SharePoint On-Premises Is Being Retired](#)

Files Connect for SharePoint On-Premises is scheduled for retirement in all Salesforce orgs as of May 18, 2018. We encourage you to migrate to Files Connect using SharePoint Online.

[Files Sync Is Being Retired](#)

Salesforce Files Sync is scheduled for retirement in all Salesforce orgs on May 25th, 2018. For more information, see [Files Sync will retire May 25, 2018](#).

Keep All Attached Files When Merging Records

Cleaning up duplicate records? Now you can merge records without worrying about losing files—all files from both records are brought into the new master record. Previously, when records were merged, the merged record did not always retain all files.

This fix applies to Salesforce Files attached to a record, but does not apply to attachments.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions, except Personal Edition.

Include File Links in Weekly Data Export

Use the ContentDocumentLink object data to see how Salesforce files are shared. Armed with this data, you can audit who has access to files and troubleshoot links created by automated systems. Exported file links can also assist with data migrations, data integrations, and provide more thorough backup and restore.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions.

Who: Users with the Weekly Export Data user permission.


How: From Setup, enter *Data Export* in the Quick Find box, then select **Export Now** or **Schedule Export**. Under Exported Data, select the **ContentDocumentLink** checkbox.

Prepare to Bid Farewell to Flash

Several files features that used to run on Adobe Flash Player in Salesforce Classic now use HTML5. Flash will be completely retired in Salesforce by Spring '19. Adobe plans to stop supporting the Flash player by 2020, and several browsers currently block Flash.

Where: This change applies to Salesforce Classic in all editions.

Why: To enhance stability and ensure that things work well over the long term, we've replaced Flash in several places in Salesforce Classic, so some files features work a bit differently. The file and content detail page now display upgraded file previews. When users click the file thumbnail in the feed or the file preview link in Files Home, they are directed to the file detail page in a new tab.

 **Note:** If you use Internet Explorer 11, clicking on a file thumbnail opens the file detail page in a new window rather than a new tab. You can change this behavior by selecting the “Always open pop-ups in a new tab” option under Internet Options in your browser.

SEE ALSO:

[Resolve Issues with Scanned PDF Previews](#)

Files Connect for SharePoint On-Premises Is Being Retired

Files Connect for SharePoint On-Premises is scheduled for retirement in all Salesforce orgs as of May 18, 2018. We encourage you to migrate to Files Connect using SharePoint Online.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Performance, Unlimited, and Developer editions.

How: To set up Files Connect using SharePoint Online, review our [Files Connect documentation](#) and follow the instructions for Files Connect using Microsoft’s cloud systems.

Files Sync Is Being Retired

Salesforce Files Sync is scheduled for retirement in all Salesforce orgs on May 25th, 2018. For more information, see [Files Sync will retire May 25, 2018](#).

Where: This change applies to Salesforce Classic in all editions, except Personal Edition.

Mobile: Do More on the Go

The Salesforce mobile apps help your users stay productive on the go. We added Chatter enhancements, email notifications for cases, and subjects for tasks and events, just to name a few.

IN THIS SECTION:

[Salesforce App: Predefined Subjects and Chatter Updates](#)

Your users can now create and use predefined subjects for tasks and events that they create on the go. We added more capabilities to Chatter, including polls, questions, and rich text. We’ve also got improved push notifications coming with the 16.0 app release later this summer.

[Salesforce Authenticator: Intelligence with Einstein, UI Updates](#)

Save time with a faster login experience. Enjoy the benefit of Einstein with Salesforce Authenticator so that frequently used locations are trusted. Einstein Automation is enabled on new downloads of Salesforce Authenticator version 3. We also made some UI updates to make authenticator easier to use.

Salesforce App: Predefined Subjects and Chatter Updates

Your users can now create and use predefined subjects for tasks and events that they create on the go. We added more capabilities to Chatter, including polls, questions, and rich text. We’ve also got improved push notifications coming with the 16.0 app release later this summer.

Where: The Salesforce mobile app is available for all editions, except Database.com.

IN THIS SECTION:

[Access the Salesforce Mobile App](#)

Your users have several options for accessing Salesforce on mobile devices that meet minimum platform requirements.

[What's New in Salesforce for Android and iOS](#)

The latest release of the Salesforce app is version 16.0. At a glance, here's what's new in the version 16.0 apps.

[Everything That's New in the Salesforce App](#)

Our latest round of new and improved Salesforce app features makes it easier to access Salesforce on the go.

[Summer '18 Features That Are Different or Not Available in the Salesforce App](#)

The Salesforce mobile app doesn't include all the functionality that's available in the full Salesforce site, whether your org is using Lightning Experience or Salesforce Classic. Learn about the Summer '18 Salesforce enhancements that either aren't available, have functional gaps from the full site, or work differently in the mobile app.

Access the Salesforce Mobile App

Your users have several options for accessing Salesforce on mobile devices that meet minimum platform requirements.

- Install Salesforce for Android or iOS. Users can download the app from Google Play or the App Store.
- Access Salesforce mobile web from a supported mobile browser on select Android, Apple, or Windows mobile devices. This option doesn't require anything to be installed.

What's New in Salesforce for Android and iOS

The latest release of the Salesforce app is version 16.0. At a glance, here's what's new in the version 16.0 apps.

Salesforce for Android, Version 16.0

Salesforce for Android, version 16.0 will be released to Google Play the week of June 25, 2018 and gradually rolled out to customers over a couple of weeks.

Here's what's new in Salesforce for Android.

- [Keep Users in the Loop with Richer Full Content Push Notifications](#) on page 382

Salesforce for iOS, Version 16.0

The App Store starts serving up Salesforce for iOS the week of June 25, 2018, version 16.0.

Here's what's new in Salesforce for iOS.

- [Keep Users in the Loop with Richer Full Content Push Notifications](#) on page 382

Everything That's New in the Salesforce App

Our latest round of new and improved Salesforce app features makes it easier to access Salesforce on the go.

Your org's Salesforce edition and licenses and user's assigned profile and permission sets, determine the Salesforce data and features available to each user.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Salesforce Mobile Web	Set up in the Full Site
Productivity Features				
Create Predefined Subjects for Tasks and Events	✓	✓	✓	
Customer Service Features				
Send Email Notifications for Case Changes	✓	✓	✓	✓
Chatter				
Share Posts, Polls, and Questions on Mobile			✓	
Get Rich Text in Your Mobile View of Community Feeds (Generally Available)			✓	
One Mention Is Enough			✓	
Show Your Trailhead Badges in Your Profile			✓	
Message Button Now Shown on Mobile Profiles			✓	
Notifications				
Keep Users in the Loop with Richer Full Content Push Notifications	✓	✓		✓
Access and Security				
Updated Apple Push Notification Service for iOS Notifications		✓		✓

Updated Salesforce App Requirements

Salesforce is available on many popular mobile platforms. Salesforce is revising the requirements for using Salesforce for Android, Salesforce for iOS, and Salesforce mobile web. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue improving the Salesforce experience.

Mobile Platform Requirements

Users can run Salesforce on mobile devices that meet these mobile platform requirements.

Operating System and Version Requirements	Mobile Browser Requirements *
Android 5.0 or later	Google Chrome on Android
iOS 10.3 or later	Apple Safari on iOS

* The latest mobile browser version is required. Mobile browser requirements apply to Salesforce mobile web only.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

Mobile Devices Used for Salesforce Testing

Salesforce performs automated and manual testing of the Salesforce for iOS and Android and Salesforce mobile web on a select set of mobile devices. For the Summer '18 release, this is the list of devices used for testing.

Platform	Phones	Tablets
Android	<ul style="list-style-type: none"> • Google Pixel 2 / Pixel 2 XL • Google Pixel / Pixel XL • Google Nexus 6P • Samsung Galaxy S9 • Samsung Galaxy S8 • Samsung Galaxy S7 • Samsung Galaxy S6 • Samsung Galaxy S5 • Samsung Galaxy Note 5 • Samsung Galaxy Note 4 	<ul style="list-style-type: none"> • Samsung Tab A 9.7 • Samsung Tab A 8.0
iOS	<ul style="list-style-type: none"> • iPhone X • iPhone 8 / 8 Plus • iPhone 7 / 7 Plus • iPhone 6S / 6S Plus • iPhone 6 / 6 Plus • iPhone 5S • iPhone SE 	<ul style="list-style-type: none"> • iPad Pro 12.9" (2nd Generation) • iPad Pro 12.9" • iPad Pro 9.7" • iPad 2017 (5th Generation) • iPad Air 2 • iPad Mini 4

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce may not be able to replicate some issues for customers using Salesforce on untested devices on due to manufacturer-specific customizations.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, the list of Salesforce-tested devices is subject to change at the sole discretion of Salesforce, with or without advance notice.

Salesforce Updates

Customers whose devices meet current minimum platform requirements are eligible to receive Salesforce feature updates and fixes.

Our goal is to release Salesforce mobile feature and functionality updates to coincide with each Salesforce major release. This information is provided to help with your release planning, but is subject to change at Salesforce's discretion.

Salesforce Mobile Web

Enhanced features and functionality are automatically available with each Salesforce major release.

Salesforce for Android and iOS

Enhanced features and functionality are provided in major version updates. We aim to release a new major version of Salesforce for Android and Salesforce for iOS after the completion of each Salesforce major release to all production instances. The timeframe in which a new major version is released varies and can be impacted by factors outside of Salesforce's control, including new requirements from Apple or Google or changes to the iOS or Android operating systems.

Customers can install new major and bug fix versions from the App Store and Google Play as long as their mobile devices meet Salesforce's current minimum mobile operating system requirements. If a device is running an older operating system, updated versions of Salesforce don't appear in the app stores.

Customer Support Services for Salesforce

Salesforce Customer Support uses commercially reasonable efforts to troubleshoot issues with Salesforce, provided:

- A user's device meets current minimum platform requirements
- Salesforce for Android and iOS users have the most recent version installed

When customers run Salesforce on Salesforce-tested devices, it's more efficient for us to troubleshoot issues. For customers using untested devices, even those meeting minimum platform requirements, we might not be able to replicate some issues due to device manufacturer-specific customizations.

Running Salesforce on older devices or devices with low computation and memory capabilities can adversely impact performance, as compared to performance on Salesforce-tested devices.

Share Posts, Polls, and Questions on Mobile

To align features across platforms, we now offer sharing in the Salesforce mobile browser app. Get a consistent sharing experience as you move from one mobile platform to another.

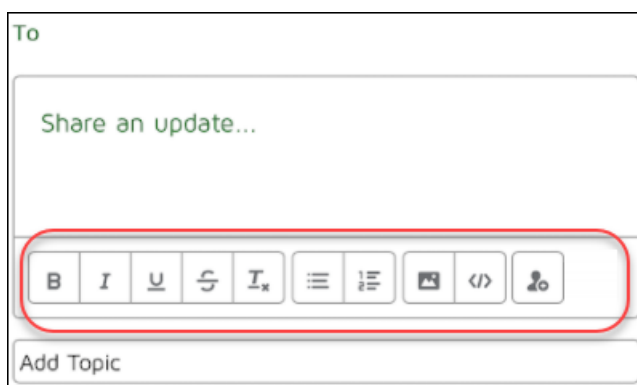
Where: This change applies to the mobile browser app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

Get Rich Text in Your Mobile View of Community Feeds (Generally Available)

Now you get formatting, list making, code snippet adding, and inline image inserting in your mobile view of your community feeds. Your mobile devices are closer than ever to giving you the full Salesforce experience on the go in your communities.

Where: This change applies to your view of community feeds in the mobile browser app in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: Community members get the rich editor experience in the mobile view of their feeds.

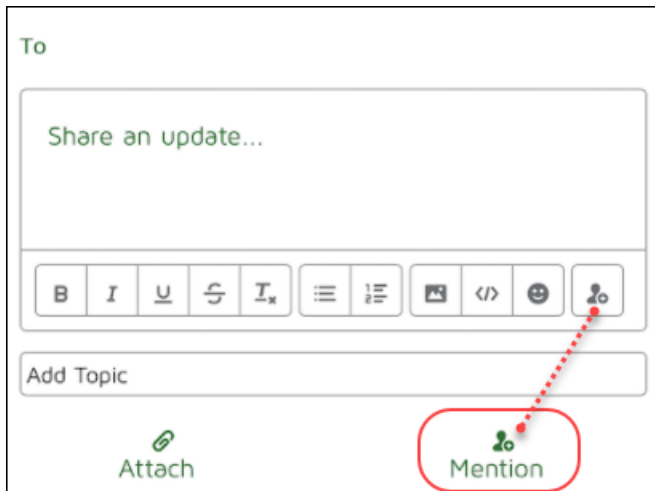


One Mention Is Enough

To clean house, we removed the second @mention icon in the Chatter publisher in the mobile browser app. Less clutter, and you didn't have to ask us twice!

Where: This change applies to the mobile browser app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

Why: In case you missed it, the Mention icon at the bottom is the one we removed.



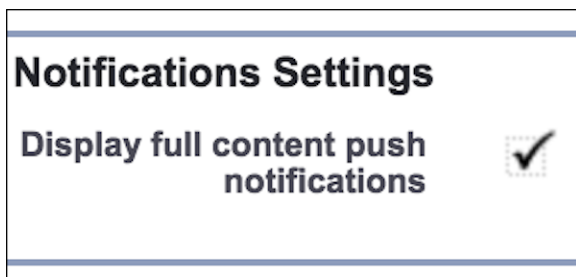
Keep Users in the Loop with Richer Full Content Push Notifications

Fully encrypted push notifications give users more context for mentions and other important business tasks and updates happening in Salesforce. Salesforce admins control how much information push notifications include, keeping sensitive information inside the app. The new style of push notifications aligns with Lightning Experience, for a consistent user experience on the go.

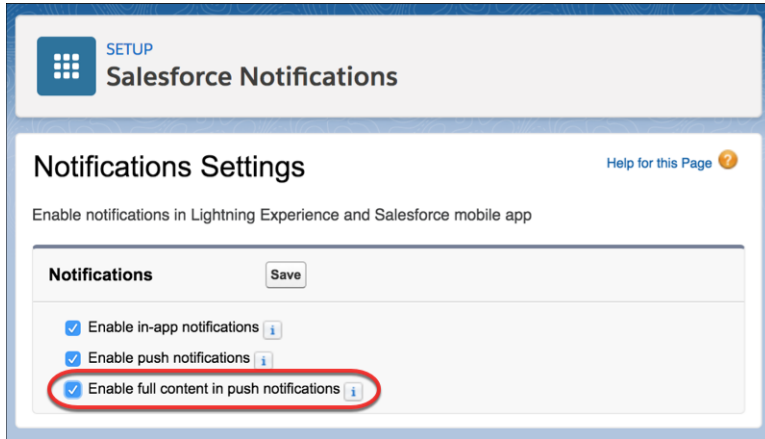
Where: This change applies to Salesforce for Android and Salesforce for iOS, in all editions except Database.com.

When: The new push notifications aren't visible until after Salesforce for Android and iOS version 16.0 are released later this summer.

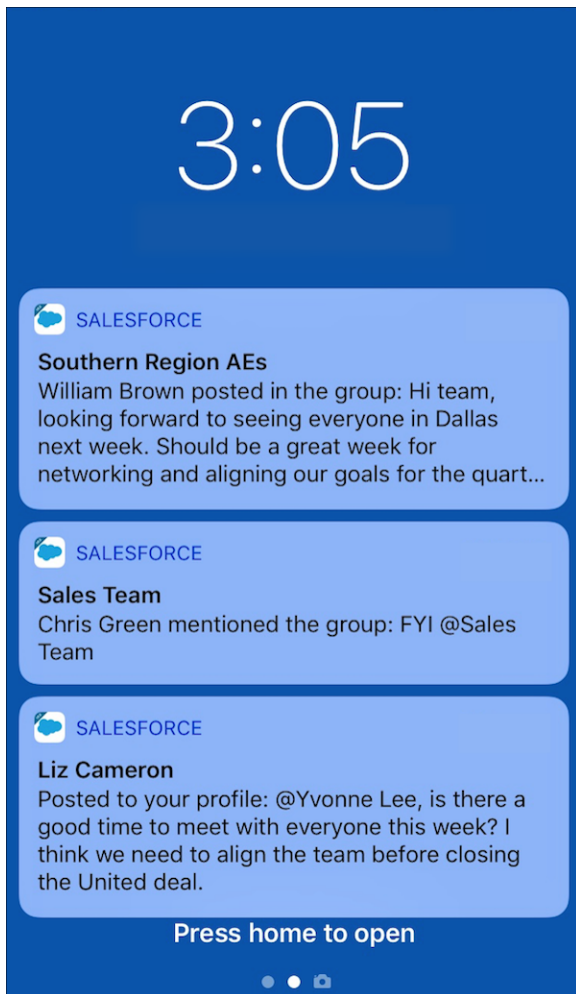
The new **Display full content push notifications** option is visible on the Manage Connected Apps page in Setup with the Summer '18 release.




The **Enable full content in push notifications** option goes away later this summer after Salesforce for iOS and Android 16.0 are generally available.




Why: With new full content push notifications, users can quickly scan for detailed notifications for the latest updates before opening Salesforce for iOS or Android.



How: New full content push notifications turn on for your organization later in Summer '18. Users need version 16.0 of Salesforce for Android and iOS for the new notifications to work properly on their mobile devices.

 **Note:** Although this feature is automatically on in Production, if you're testing in Sandbox, you must turn on the feature manually. Select **Display full content push notifications** and download the 16.0 beta version of Salesforce for Android and iOS for testing.

Although the **Display full content push notifications** option is visible with the Summer '18 release, notifications don't work until users update to Salesforce for Android and iOS version 16.0, and the functionality is fully enabled for customers. If you want to opt out of full content push notifications, deselect **Display full content push notifications** any time after the Summer '18 release.

 **Note:** Some apps aren't ready for this new style of push notifications, including Salesforce Chatter and Field Service Lightning. After the **Enable full content in push notifications** option goes away, these apps keep their last known push notification settings. To change push notification settings in the future, file a case with Salesforce Support.

SEE ALSO:

[Salesforce Help: Enable Salesforce App Notifications \(can be outdated or unavailable during release preview\)](#)

Updated Apple Push Notification Service for iOS Notifications

We're switching from legacy binary push to HTTP/2 push in Summer '18. You can now use provider authentication tokens in addition to provider certificates to enable push messaging. Unlike provider certificates, provider authentication tokens don't expire saving admins and app users time.

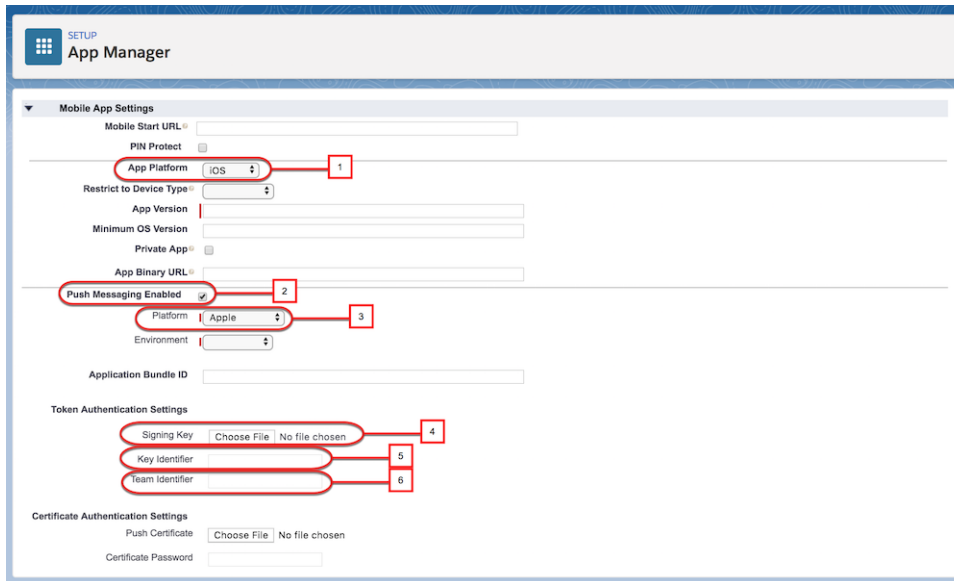
Where: This feature is available for Salesforce for iOS, in all editions except Database.com.


Why: Apple plans to eventually depreciate support for legacy binary push, so we're moving to HTTP/2 push in anticipation of that change.

How: To use provider authentication tokens, update Mobile Settings in your connected app.

Type *App Manager* into the Quick Find box in Setup then navigate to **New Connected App**. In the Mobile App Settings section, perform these steps.

1. For **App Platform**, select **iOS**.
2. Select **Push Messaging Enabled**. The dialog box expands to show more settings.
3. For **Platform**, select **Apple**.
4. Upload **Signing Key** from your Apple developer account.
5. Enter the **Key Identifier** from your Apple developer account.
6. Enter the **Team Identifier** from your Apple developer account.



 **Note:** You can use authentication tokens, push certificates, or both. If a token is provided, Salesforce always uses the token. We also use Application Bundle ID when it is provided. We recommend using Application Bundle ID to avoid problems with your push notification settings.

SEE ALSO:

[Salesforce Help: Create a Connected App \(can be outdated or unavailable during release preview\)](#)

[External Link: Communicating with Apple Push Notification Service](#)

[External Link: Communicating with Apple Push Notification Service Using Authentication Tokens](#)

Summer '18 Features That Are Different or Not Available in the Salesforce App

The Salesforce mobile app doesn't include all the functionality that's available in the full Salesforce site, whether your org is using Lightning Experience or Salesforce Classic. Learn about the Summer '18 Salesforce enhancements that either aren't available, have functional gaps from the full site, or work differently in the mobile app.

 **Note:** For the complete list of differences between the Salesforce app and the full site, see [What's Different or Not Available in the Salesforce App](#) in the Salesforce Help.

Productivity Features

Override the New Event Button on the Calendar

You can override the New Event button on the calendar in Lightning Experience by creating a custom Lightning component. The Lightning component isn't available for overriding the New Event button in the Salesforce app.

Salesforce Authenticator: Intelligence with Einstein, UI Updates

Save time with a faster login experience. Enjoy the benefit of Einstein with Salesforce Authenticator so that frequently used locations are trusted. Einstein Automation is enabled on new downloads of Salesforce Authenticator version 3. We also made some UI updates to make authenticator easier to use.

Intelligently Save Trusted Locations with Einstein

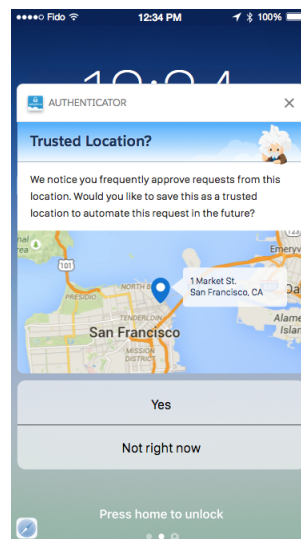
When Einstein Automation is enabled, Authenticator automatically trusts locations that you use three or more times for future logins. Users can choose to enable or disable this option. When disabled, existing trusted locations remain. Einstein Automation is enabled on new downloads of Salesforce Authenticator version 3.

Where: This feature is available in version 3.0 for iOS and Android in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: Einstein Automation is enabled by default with the following device settings.

- iOS has location services permission set to Always, and Background App Refresh is enabled.
- Android has location services set to High Accuracy Mode.

When a user approves a request, Einstein Automation sends a notification to the user to check whether future requests for the location can be automated.



SEE ALSO:

[Salesforce Help: Have Authenticator Intelligently Save Your Trusted Locations \(can be outdated or unavailable during release preview\)](#)

Remove Trusted Locations with a New Method

Salesforce Authenticator version 3 includes a different way to remove the location-based automated verifications that you select.

Where: This feature is available for iOS and Android in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: In Trusted Locations, tap **View All**. Tap the icon next to the trusted location that you want to remove, and tap **Remove Trusted Location**. In version 2, you swiped left on the location that you wanted to stop trusting.

Financial Services Cloud: Person Accounts Enhancements, Customized Group Relationship Views, Rollup Enhancements, and Salesforce Inbox and Pardot Compatibility

View consolidated, customizable client profiles with person accounts—now certified for use on Salesforce mobile, Advisor Analytics, and partner and customer communities. Show key customer relationships with enhanced group relationship views. Enhanced rollups let users quickly take action and win opportunities from the Primary Group view. Accelerate data loads by disabling rollup-by-lookup calculations. Boost advisor and banker productivity in Financial Services Cloud with Salesforce Inbox and Pardot. And there's lots more, including a Teller Access permission set and usability and accessibility enhancements.

Read the [Financial Services Cloud Administrator Guide](#) to get the most out of these new features and enhancements.

IN THIS SECTION:

[Streamline the User Experience with Person Accounts](#)

Person accounts are going places in Financial Services Cloud! They're now certified for use on Salesforce mobile, Advisor Analytics, and partner and customer communities. With person accounts, users can view all their customer information and drive engagement on a consolidated client profile. Users can log a call, create a task, or create a financial account or an opportunity—all on the same page. Follow and share client records with single-step actions, and improve data quality with duplicate record management.

[Customize Group Relationship Views](#)

Control the visibility of the Related Accounts and Related Contacts sections on the Relationship Map and Group Builder to display key relationships relevant to your users. Provide the right level of detail at the component level based on users' roles, such as advisor, banker, or teller. Plus, show or hide buttons and actions based on user permissions, simplifying the interface and controlling access to customer data.

[Roll Up Opportunities to the Primary Group](#)

Enable this feature to show all group member opportunities on a related list on the Primary Group. Users can quickly take action and win opportunities from the Primary Group.

[Accelerate Data Loads as Needed](#)

Two Financial Services Cloud settings let you speed up data loads. These settings speed up data loads by controlling whether rollup-by-lookup rules are queried and calculated for your org or for a specific profile.

[Automate Rollup by Lookup Rule Recalculations Using Apex](#)

Automate Rollup by Lookup summary recalculations for your org by using Apex jobs to run RBL rules. Import financial account data faster by turning off the RBL rules and then running Apex jobs to invoke recalculations.

[Enhance Productivity with Salesforce Inbox](#)

Salesforce Inbox brings together users' email inbox and Financial Services Cloud using plug-ins for Gmail and Outlook, plus Android and iOS mobile applications. Users can view and manage client details; create referrals, leads, and opportunities; assign tasks; and send invites to events straight from their email inbox.

[Get Smarter Marketing Automation with Salesforce Pardot](#)

Users can connect to their customers and prospects through marketing automation with Salesforce Pardot, now certified with Financial Services Cloud. With Pardot's Engage, users can send one-to-one emails from their chosen interface while automatically logging all interactions in Pardot and Financial Services Cloud.

[Get Tellers Up and Running with the Teller Access Permission Set](#)

The Teller Access permission set provides the default permissions and field-level security settings teller users need to get started.

[Associate an Activity to Multiple Contacts](#)

Users can now associate a single task not only to members of a household but also to other related contacts. Instead of creating a task multiple times, streamline task follow-up by associating a task to multiple people. The task is displayed on all associated client profiles on the Activity Timeline.

[Enhanced Accessibility](#)

We're committed to accessibility for all users. With this in mind, we improved captioning, alternative text, and other accessibility features to make Financial Services Cloud easier for users working with assistive technology.

[Permission Set License Required for All Financial Services Cloud Users](#)

Users who require access to Financial Services Cloud data, whether it's via the user interface or the API, must now have a Financial Services Cloud Standard or Basic permission set license. This change ensures that only licensed users can access Financial Services Cloud features. If you've assigned permission set licenses to all of your users, no further action is required.

Streamline the User Experience with Person Accounts

Person accounts are going places in Financial Services Cloud! They're now certified for use on Salesforce mobile, Advisor Analytics, and partner and customer communities. With person accounts, users can view all their customer information and drive engagement on a consolidated client profile. Users can log a call, create a task, or create a financial account or an opportunity—all on the same page. Follow and share client records with single-step actions, and improve data quality with duplicate record management.

Where: Person accounts must be enabled in your Financial Services Cloud org. This feature is available in Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions.

How: If you're currently using the individual data model, you can choose to convert your individual records to Financial Services Cloud person accounts. Before switching to person accounts, evaluate your company's needs and review [Leverage Person Accounts in Financial Services Cloud](#) to determine whether this transition is right for you. See [Considerations for Transforming the Individual Data Model to Person Accounts in Financial Services Cloud](#).

Customize Group Relationship Views

Control the visibility of the Related Accounts and Related Contacts sections on the Relationship Map and Group Builder to display key relationships relevant to your users. Provide the right level of detail at the component level based on users' roles, such as advisor, banker, or teller. Plus, show or hide buttons and actions based on user permissions, simplifying the interface and controlling access to customer data.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions.

How: Use the Relationship Map component settings in the Lightning App Builder to control section visibility for the Relationship Map and Group Builder. See [Control Who Sees What on the Relationship Map and Group Builder](#).

Roll Up Opportunities to the Primary Group

Enable this feature to show all group member opportunities on a related list on the Primary Group. Users can quickly take action and win opportunities from the Primary Group.

Where: This feature is available in Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions.

How: Add an Opportunities picklist value to the Rollups field on account contact relationships. See [Enable Opportunity Rollups](#).

Accelerate Data Loads as Needed

Two Financial Services Cloud settings let you speed up data loads. These settings speed up data loads by controlling whether rollup-by-lookup rules are queried and calculated for your org or for a specific profile.

Where: This feature is available in Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions.

How: In the Wealth Application Config, before initiating insert or update operations, deselect **Enable Rollup Summary** and **Enable Group Record Rollup**.

Automate Rollup by Lookup Rule Recalculations Using Apex

Automate Rollup by Lookup summary recalculations for your org by using Apex jobs to run RBL rules. Import financial account data faster by turning off the RBL rules and then running Apex jobs to invoke recalculations.

How: Write Apex code to invoke rollup recalculations. See [Force Rollup by Lookup Recalculations](#).

Enhance Productivity with Salesforce Inbox

Salesforce Inbox brings together users' email inbox and Financial Services Cloud using plug-ins for Gmail and Outlook, plus Android and iOS mobile applications. Users can view and manage client details; create referrals, leads, and opportunities; assign tasks; and send invites to events straight from their email inbox.

Where: Salesforce Inbox is available at an extra cost in Professional, Enterprise, and Unlimited editions.

How: See [Inbox](#).

Get Smarter Marketing Automation with Salesforce Pardot

Users can connect to their customers and prospects through marketing automation with Salesforce Pardot, now certified with Financial Services Cloud. With Pardot's Engage, users can send one-to-one emails from their chosen interface while automatically logging all interactions in Pardot and Financial Services Cloud.

Where: Pardot is available at an extra cost in Professional, Enterprise, and Unlimited editions.

How: See [Connecting Pardot and Salesforce](#).

Get Tellers Up and Running with the Teller Access Permission Set

The Teller Access permission set provides the default permissions and field-level security settings teller users need to get started.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions.

How: Clone a Standard User profile, and add the Teller Access permission set. See [Assign the Teller Access Permission Set \(Optional\)](#).

Associate an Activity to Multiple Contacts

Users can now associate a single task not only to members of a household but also to other related contacts. Instead of creating a task multiple times, streamline task follow-up by associating a task to multiple people. The task is displayed on all associated client profiles on the Activity Timeline.

Where: This feature is available in Lightning Experience and all versions of the mobile app in Professional, Enterprise, and Unlimited editions.

How: See [Enable Shared Activities](#).

Enhanced Accessibility

We're committed to accessibility for all users. With this in mind, we improved captioning, alternative text, and other accessibility features to make Financial Services Cloud easier for users working with assistive technology.

Where: These enhancements apply to all Financial Services Cloud orgs.

How: For details on how Financial Services Cloud conforms with accessibility standards, see our Voluntary Product Accessibility Templates (VPATs) at [VPAT\[508\]](#) and [VPAT\[WCAG 2.0\]](#).

Permission Set License Required for All Financial Services Cloud Users

Users who require access to Financial Services Cloud data, whether it's via the user interface or the API, must now have a Financial Services Cloud Standard or Basic permission set license. This change ensures that only licensed users can access Financial Services Cloud features. If you've assigned permission set licenses to all of your users, no further action is required.

Where: This change applies to all Financial Services Cloud orgs.

When: This change occurs first in Sandbox Preview orgs in early May. The requirement takes effect in your production org when the Summer '18 release rolls out in early June.

How: Go to **Setup > Company Settings > Company Information > Permission Set Licenses** and verify that the right number of Financial Services Cloud licenses have been added to your org. Then go to **Setup > Permission Sets** and assign them to users.

See also:

- [Assign Financial Services Cloud Permission Set Licenses](#)
- [Manage Bulk Permission Set License \(PSL\) Assignments for Financial Services Cloud](#)

Health Cloud: More Modular, Easier EHR Integration, Field Service Lightning Support

Health Cloud now supports Field Service Lightning, and you can choose from a variety of out-of-the-box ways to send and receive electronic health records (EHR) data using the HL7 v2 standard.

Health Cloud is available in Lightning Experience and in Salesforce Classic.

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

IN THIS SECTION:

[Work with Electronic Health Records in HL7 V2.x](#)

You can bring key patient electronic health records (EHR) into the Health Cloud data model via HL7 v2.x messages. Use our pre-built adapters and mapping logic to more easily ingest data such as patient demographics, hospital admissions, discharges, transfers, clinic appointments, and allergies. Reconfigure, replace, or extend the adapters and mapping to meet your unique needs.

[Put Health Cloud to Work on Mobile Devices](#)

If you have Field Service Lightning, you can send your health care providers into the field with Health Cloud on their phones. Providers can check patient data, manage scheduling, and interactively update goals and tasks in the patient's care plan from their mobile Android or iOS devices.

[New API Speaks Business Language](#)

The CreatePatient API programmatically creates a record to represent a new patient. This allows developers to work with the concept of "patient," specific to Health Cloud, rather than Account, Contact, or Person Account. CreatePatient works whether you are using Health Cloud's Individual record type or the person account standard object for the patient.

[More Flexible Views of Patient Information](#)

You can independently configure each section of the "Patient Detail for Health Cloud" Lightning component to display information from a Lightning Account or Contact record page using the Individual record type.

[Permission Set License Required for All Health Cloud Users](#)

Users who require access to Health Cloud data, whether it's via the user interface or the API, must have the Health Cloud Permission Set License. This has been optional until now.

[Health Cloud Supports Russian, Italian, and Danish Languages](#)

We've added Danish (DA), Russian (RU), and Italian (IT) to the locales we support.

[Usability Enhancements](#)

We've made some improvements to make your users' lives a little easier.

[New and Changed Health Cloud Lightning Components](#)

We've added three components for working with different kinds of patient information.

[Health Cloud Metadata: New Types](#)

Health Cloud includes three new custom metadata types.

Work with Electronic Health Records in HL7 V2.x

You can bring key patient electronic health records (EHR) into the Health Cloud data model via HL7 v2.x messages. Use our pre-built adapters and mapping logic to more easily ingest data such as patient demographics, hospital admissions, discharges, transfers, clinic appointments, and allergies. Reconfigure, replace, or extend the adapters and mapping to meet your unique needs.

Where: This change applies to Lightning Experience and Salesforce Classic in in **Enterprise**, **Performance**, and **Unlimited** Editions.

Who: Users with the Health Cloud Permission Set License assigned to them can work with this feature.

Why: HL7 v2 adapters and out-of-the-box v2 ADT mappings make Health Cloud even more efficient and cost-effective to integrate with various EHR systems.

How: Three new metadata types are provided to manage this functionality. You'll find them in the Setup tree under **Custom Metadata Types**.

HL7setting

Provides parser support for electronic health record transmissions using the HL7 standard.

HL7ParserMapping

Determines which Apex class is used to parse HL7 segments.

ServiceOrchestrationSetting

Determines order of execution of parser operations.

SEE ALSO:

[Storing EHR Data in Salesforce Objects](#)

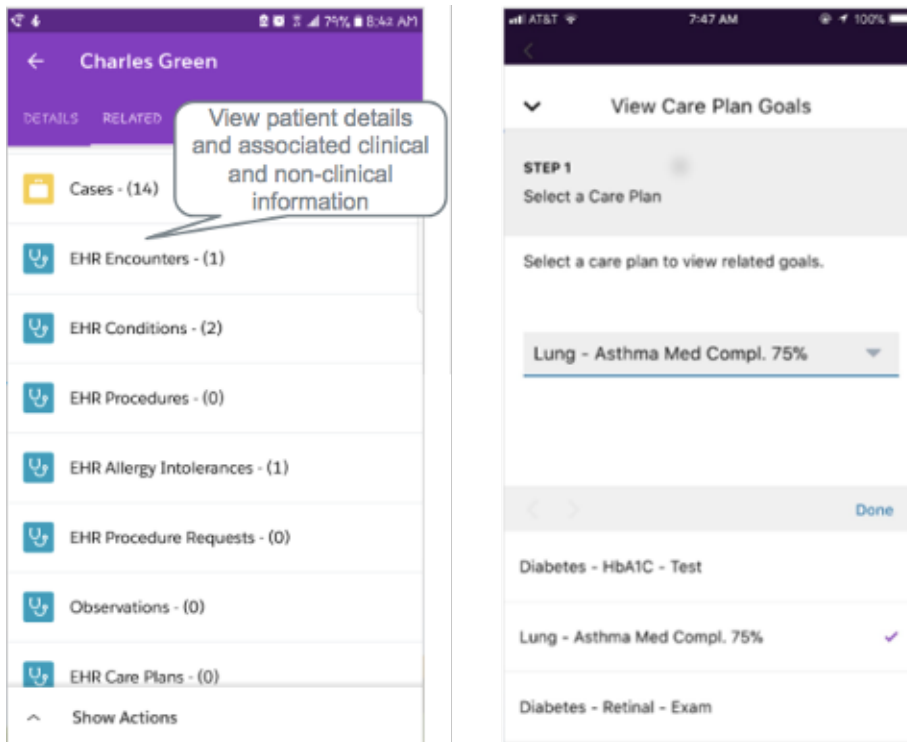
Put Health Cloud to Work on Mobile Devices

If you have Field Service Lightning, you can send your health care providers into the field with Health Cloud on their phones. Providers can check patient data, manage scheduling, and interactively update goals and tasks in the patient's care plan from their mobile Android or iOS devices.

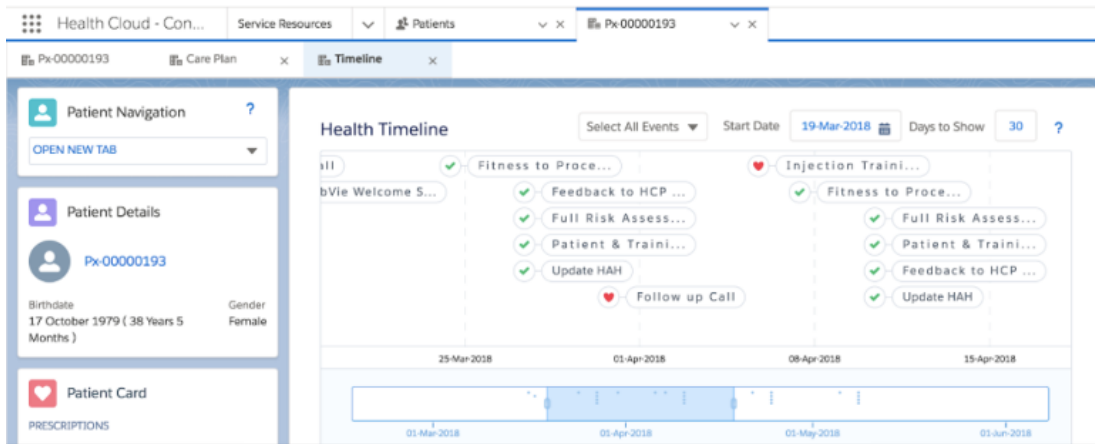
Where: This change applies to Lightning Experience, Salesforce Classic, the Field Service Lightning app, and all versions of the mobile app in Enterprise, Performance, and Unlimited Editions.

Who: Users with the Health Cloud Permission Set License and the Field Service Lightning permission license assigned to them can work with this feature.

Why: Using Health Cloud flows in Field Service Lightning enables you to manage a distributed workforce delivering services in patients' homes or workplaces, or in different parts of a campus.



Care providers can use the Field Service Lightning Mobile App on iOS or Android to view patient information, work with tasks and goals in the patient care plan, and manage their appointments on the patient timeline.



How: Health Cloud for Field Service Lightning is delivered as an unmanaged package. Install the Field Service Lightning package, then install the Health Cloud package by going to <http://industries.force.com/healthcloudextensionfieldservice>.

SEE ALSO:

[Salesforce Help: Field Service Lightning](#)

[Salesforce Help: Support Health Cloud for Mobile Users](#)

New API Speaks Business Language

The CreatePatient API programmatically creates a record to represent a new patient. This allows developers to work with the concept of “patient,” specific to Health Cloud, rather than Account, Contact, or Person Account. CreatePatient works whether you are using Health Cloud’s Individual record type or the person account standard object for the patient.

Who: Users with the Health Cloud Permission Set License assigned to them can work with this feature.

How: Pass in standard or custom fields in the Account and Contact object as arguments. Custom Fields are populated as provided in a map along with the namespace. Custom field entries that do not match custom fields in Account or Contact are ignored.

If the creation of Account or Contact fails, the entire transaction is rolled back.

SEE ALSO:

[Developer Guide: Create Patients With the Health Cloud Business API](#)

More Flexible Views of Patient Information

You can independently configure each section of the “Patient Detail for Health Cloud” Lightning component to display information from a Lightning Account or Contact record page using the Individual record type.

Where: This change applies to Lightning Experience and all versions of the mobile app in Enterprise, Performance, and Unlimited Editions.

Who: Users with the Health Cloud Permission Set License assigned to them can work with this feature.

How: Use any combination of the three new standalone components to deliver the information previously contained in the three sections of the **Patient Detail for Health Cloud** component.

- **Patient Navigation for Health Cloud** now contains the navigation capabilities of Health Cloud as a standalone Lightning component.
- **Patient Info for Health Cloud** now contains the patient detail capabilities of Health Cloud as a standalone Lightning component.
- **Patient Card for Health Cloud** now contains the patient card capabilities of Health Cloud as a standalone Lightning component.

You can drag these standalone components individually into the pinned region of your page template to customize the persistent information you want your user to have at all times when navigating among subtabs.

The existing "Patient Detail for Health Cloud" component is still available. Your current implementation of Health Cloud using flexipage templates without pinned regions still works, but we recommend that you switch to Pinned Region Pages, preferably with a left sidebar.

We've added the **Persistent Patient Detail in Subtabs** custom setting, which disables the Patient Card from loading automatically to the left of other Health Cloud components inside a single column in Lightning Console. This allows admins to configure the Patient Detail for Health Cloud, Patient Navigation for Health Cloud, Patient Info for Health Cloud, and Patient Card for Health Cloud to be standalone lightning components inside a pinned header or sidebar of the Account flexipage.

To prevent the non-customizable Patient Detail for Health Cloud component from being displayed in each subtab, disable the **Persistent Patient Detail in Subtabs** custom setting.

SEE ALSO:

[Health Cloud Admin Guide: Customize the Patient Card](#)

[Salesforce Help: Customize Your Lightning Console Pages](#)

Permission Set License Required for All Health Cloud Users

Users who require access to Health Cloud data, whether it's via the user interface or the API, must have the Health Cloud Permission Set License. This has been optional until now.

Where: This change applies to Lightning Experience, Salesforce Classic, the Field Service Lightning app, and all versions of the mobile app in Enterprise, Performance, and Unlimited Editions.

Why: The Health Cloud Permission Set License ensures that only licensed users can access your Health Cloud features. Before June 1, make sure each of your Health Cloud users has the Health Cloud Permission Set License.

Who: Most Community participants are not affected. Patients, caregivers, and other customers are already covered by one of your org's Community licenses. If you have community members who need access to Health Cloud objects, your Salesforce representative can help you determine the PSLs you need.

When: You'll see the change first in Sandbox Preview orgs in early May. The new requirement takes effect in your production org when the Summer '18 release rolls out in early June.

How: Go to **Setup > Company Settings > Company Information > Permission Set Licenses** and verify that the right number of Health Cloud licenses have been added to your org. Then go to **Setup > Permission Sets** and assign them to users.

SEE ALSO:


[Assign a Permission Set License](#)

[Assign Permission Set Licenses in Bulk](#)

Health Cloud Supports Russian, Italian, and Danish Languages


We've added Danish (DA), Russian (RU), and Italian (IT) to the locales we support.


If you set up Health Cloud before the Spring '18 release, you'll need to update your display to use the new languages. In Setup, use the Quick Find box to find **Object**, then click **Create > Objects**. On the Custom Objects page, click **Patient Card Configuration**. Under **Custom Fields & Relationships**, click **Language**. Click **New** and fill in the name of the language you are adding.

 **Note:** This must be the exact name of the language. For example, *Russian* works, but *russian* doesn't work. For any language specification the system doesn't recognize, English is used by default.

On the Custom Objects page, go to **Timeline View Configuration** and repeat the steps.

To check that your new language is showing up, go back to **Patient Card Configuration** and look for it in the **Languages** dropdown.

 **Tip:** 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.

 **Important:** When Health Cloud supports a language, this doesn't necessarily mean Salesforce has done a legal compliance evaluation for all countries in which that language is spoken. You must determine whether there are any legal or regulatory requirements that apply to using Health Cloud for each country in which you intend to use it.

Usability Enhancements

We've made some improvements to make your users' lives a little easier.

Where: These changes apply to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited Editions.

Language Options in Your Language

When users select a language in Health Cloud, you can now display the language options in the current user's own language. For example, if your org language is set to English, the Portuguese option is listed as Portuguese, and Dutch is listed as Dutch. Previously, the language settings page listed the translated names of the available languages. For example, Portuguese appeared as Português, and Dutch was labeled Nederlands.

If you set up Health Cloud before the Spring '18 release, you'll need to update your display to take advantage of the new options. In Setup, find **Object**, click **Create > Objects > Patient Card Configuration**. Click **Edit** next to each language and specify the new label for that language option.

Back on the Custom Objects page, go to **Timeline View Configuration** and repeat the steps.

To check that the labels appear the way you want them to, go back to the configuration page and look for them in the **Languages** dropdown.

Care Plans

Creating a Care Plan now adds the patient to the Care Team automatically.

Task Filtering

The Care Plan Empower Component now shows all your closed tasks, not only tasks with "Completed" status. Previously, the component would filter on "Completed" tasks but not on other configured statuses equivalent to closed, such as "Canceled."

New and Changed Health Cloud Lightning Components

We've added three components for working with different kinds of patient information.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited Editions.

The following component has changed.

Patient Card

The patient card Lightning component can now be replaced by three separate components.

The following components are new.

Patient Navigation for Health Cloud

Enables navigation.

Patient Info for Health Cloud

Delivers patient detail, such as contact information.

Patient Card for Health Cloud

Displays the patient care information, such as conditions and prescriptions.

Health Cloud Metadata: New Types

Health Cloud includes three new custom metadata types.

HL7setting

Provides parser support for electronic health record transmissions using the HL7 standard.

HL7ParserMapping

Determines which Apex class is used to parse HL7 segments.

HcServiceOrchestrationSetting

Determines order of execution of parser operations.

SEE ALSO:

[Storing EHR Data in Salesforce Objects](#)

Customization: More Genius via Clicks, External Services and Time Fields Generally Available, Improved Error Handling

Customize your way to a smarter org with the new Einstein Next Best Action pilot. We've taken several features from pilot or beta to generally available: External Services, custom time fields, Lightning components as flow actions, and flow stages. If you frequently use Lightning pages, processes, or flows, enjoy improved error handling.

Customization features help you extend your org by enhancing your objects, data, and fields, updating 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. Customization features also include tools to administer and secure your org.

IN THIS SECTION:

[Einstein Prediction Builder: Enjoy Custom AI Without Code \(Beta\)](#)

Make your business processes smarter and more predictive with custom predictions on almost any standard or custom object in Salesforce. When the standard Einstein solutions don't fit what you're trying to predict, Einstein Prediction Builder lets you build your own predictive model. Best of all, you can build it in just a few clicks, without code.

[Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#)

Integrate business rules, predictive models, and data—both inside and outside of Salesforce—to deliver the right offer at the right moment to the right person. Perhaps you have offers that are relevant only under particular conditions, such as an upgrade or a discount. Or maybe there are multiple ways for service agents to assist customers, and you want to guide the agent to the most appropriate action. Take a look at Einstein Next Best Action.

[External Services: Generally Available with Enhancements](#)

Features from the beta release, along with improvements like edit capability, an expanded schema size, more response code handling, and a full-screen wizard, make using External Services easy. Use declarative tools so that you can focus on doing what you need by using the data you import instead of coding.

[Data Protection and Privacy: Enhancements to the Individual Object](#)

Regardless of whether you're complying with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR), track certain privacy preferences when your customers request them. Data privacy records, based on the Individual object, help you do that.

[Lightning Flow: Better Error Handling and Debugging, Smarter Ways to Configure and Distribute Flows](#)

Build flows in more editions. Avoid errors and limits when processes and flows are executed in bulk. Fully integrate your flows with browsers, Lightning Console apps, and Communities. Show users where they are in a flow. Debug your flows with more details, and track usage against limits. Manipulate collections and active stages more easily with Assignment elements.

[Lightning App Builder: Broken Components That Don't Break Pages, Pinned Regions in the Console Sidebar, and New Components](#)

A broken component on a Lightning page gets dropped instead of breaking the page. To save your users from switching between pages to get information that they need, use pinned regions in the console sidebar. Enhance your Lightning user profile pages with a Badges component. And use a host of new components to better manage emails and tabs in your Lightning for Outlook email application panes.

[Fields: Time Field Type Generally Available and Prediction Values Display in Number Fields \(Beta\)](#)

All editions get the time custom field type. Admins using Einstein Prediction Builder get more control over the field displaying the prediction value.

[Salesforce Connect: Custom HTTP Headers, Triggers on External Objects \(Beta\), and More](#)

We're adding some great new tools for interacting with your external data systems. Now you can define and activate custom HTTP headers to pass more request information to OData 2.0 and 4.0 external data sources for processing. With the OData 4.0 adapter for Salesforce Connect, now a public beta release, you can react to changes made to data that's stored outside Salesforce. And to top it off, the fields we added and updated for tracking Salesforce Connect callouts to external systems are generally available.

[General Setup: Lightning Bolt Solutions and Enhancements for Actions and Approvals](#)

Easily publish turnkey solutions that include Lightning apps, Lightning communities, and flows. For quick actions, you have more ways to set predefined values for picklist fields and translated success messages. The sender for approval request emails now support organization-wide addresses.

[AppExchange: New Filters and Profile Enhancements](#)


Quickly identify the best solution for your business requirements with new filter options for clouds, features, and special credentials. We also made it easier to view and update your AppExchange profile.

Einstein Prediction Builder: Enjoy Custom AI Without Code (Beta)

Make your business processes smarter and more predictive with custom predictions on almost any standard or custom object in Salesforce. When the standard Einstein solutions don't fit what you're trying to predict, Einstein Prediction Builder lets you build your own predictive model. Best of all, you can build it in just a few clicks, without code.

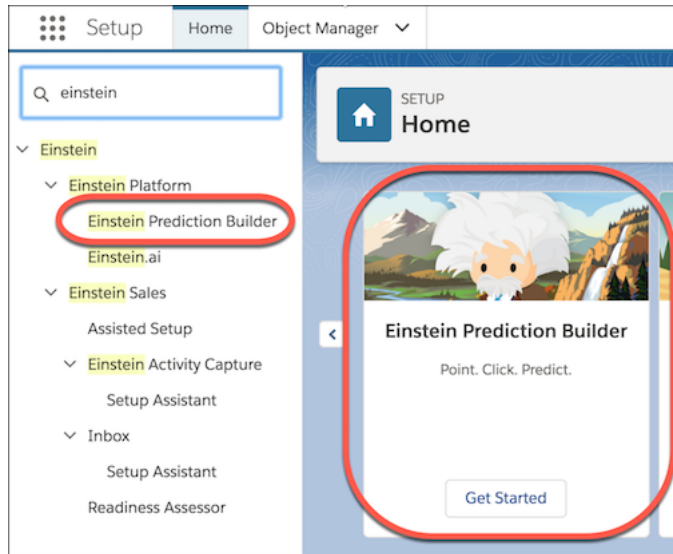
Who: This feature is available to admins with the EinsteinBuilderFree license.

Where: Einstein Prediction Builder is available in Lightning Experience in Enterprise and Developer editions.

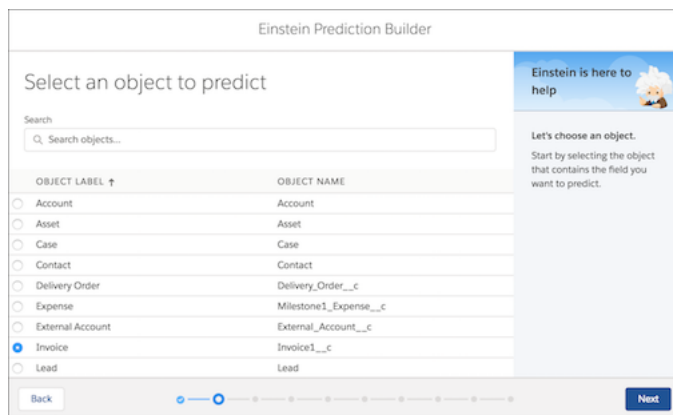
 **Note:** As a beta feature, Einstein Prediction Builder is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as

is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Einstein Prediction Builder in the [Salesforce Einstein group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

How: Find Einstein Prediction Builder in Setup in the Einstein Platform section. You might also have a handy tile that takes you right to it.

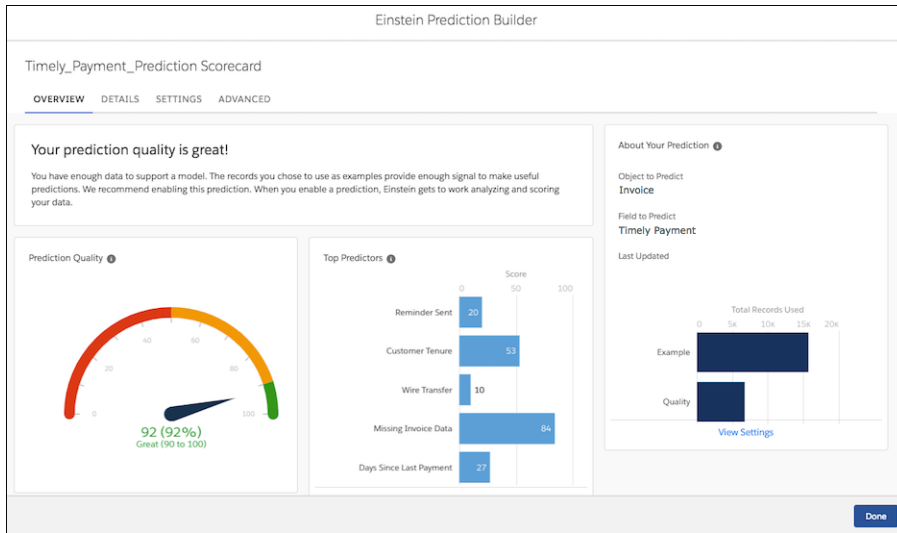


What kinds of things can you predict with Einstein Prediction Builder? Almost anything that happens in your business. Let's say you want to predict how likely it is that your customers will pay their invoice on time. You create a prediction on your custom Invoice object. Then you select the field you want to predict. In this case, you select a custom field that represents whether the customer paid the invoice on time. Just a few more clicks, and Einstein starts building your prediction!



Einstein can predict the following types of fields: checkboxes, specially constructed formula fields, and numeric fields.

When Einstein is finished (within 24 hours), you get a scorecard showing how accurate your prediction is likely to be. It has all the information you need at a single glance: whether to enable your prediction, which factors are best at making a prediction, and recommended steps for improving your data set or prediction.



When you build a prediction, Einstein Prediction Builder creates a [custom field](#) on page 429 for storing your prediction results. This custom field is a number field with a special setting on it called AI Prediction. It's stored on the object that you're predicting. All you have to do is name the field when you're creating your prediction. If you want to create the custom field yourself, you can do that. Enter its name and label when creating your prediction.

SEE ALSO:

- [Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)
- [Show Einstein Predictions Where You Want Them \(Beta\)](#)

Einstein Next Best Action: Use Strategies to Recommend Actions and Offers (Pilot)

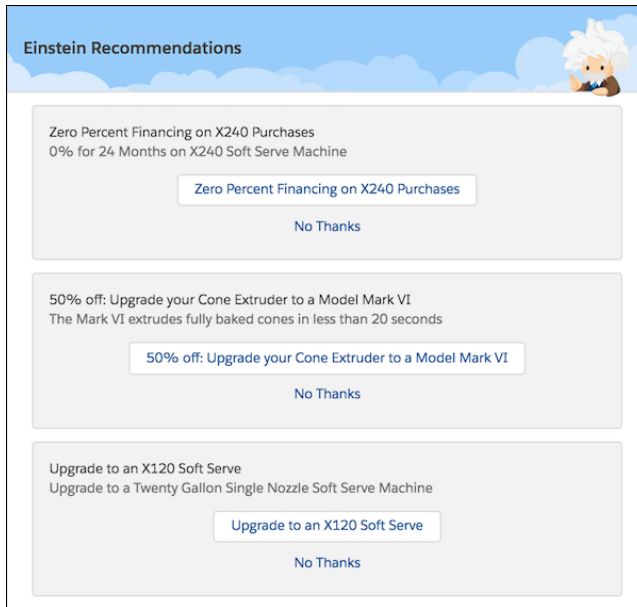
Integrate business rules, predictive models, and data—both inside and outside of Salesforce—to deliver the right offer at the right moment to the right person. Perhaps you have offers that are relevant only under particular conditions, such as an upgrade or a discount. Or maybe there are multiple ways for service agents to assist customers, and you want to guide the agent to the most appropriate action. Take a look at Einstein Next Best Action.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Note: We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

Why: For example, when a sales rep opens a contact record, the Einstein Recommendations component runs a strategy that displays recommended offers for that contact.

- The first offer is recommended because the customer's credit score is above a certain threshold.
- Other offers are recommended because the customer's satisfaction score is above average, and upsells are deemed appropriate.



How: Create propositions to represent your custom offers and actions. When a user accepts a proposition by clicking the button, a screen flow is launched.

Build recommendation strategies that query data, make decisions, and filter or sort propositions.

Display recommendations for a given strategy by adding the right Lightning component to your pages. For Lightning pages, add the Einstein Recommendations component. For Lightning community pages, add the Recommended Actions component. For Visualforce pages, use Lightning Out to add the lightning:nextBestAction component.

Related Updates for Developers

Lightning Components

New component: [lightning:nextBestActions](#)

Chatter REST API

New resources: Get a proposition, get recommendations for a strategy, and record user reactions to recommendations

Chatter in Apex

New methods: Get a proposition, get recommendations for a strategy, and record user reactions to recommendations

SEE ALSO:

[Recommend Actions and Offers to Community Members \(Pilot\)](#)

[Recommend Actions and Offers to Lightning Users \(Pilot\)](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

External Services: Generally Available with Enhancements

Features from the beta release, along with improvements like edit capability, an expanded schema size, more response code handling, and a full-screen wizard, make using External Services easy. Use declarative tools so that you can focus on doing what you need by using the data you import instead of coding.

IN THIS SECTION:

[Create an External Service \(Generally Available\)](#)

Use External Services to connect to an outside service, invoke methods based on the external source via a flow, and import the service data into Salesforce. For example, you can connect to a credit service that determines if credit is extended to a Salesforce account. Want to know the payment terms? Use External Services. When the flow runs, the output contains the credit decision and, if applicable, the payment terms.

[Enjoy an Improved External Services User Interface](#)

Save time with the new streamlined user interface by entering necessary information all on the same page.

[Edit an External Service](#)

No need to create another external service when you want to make some changes. External Services now has an edit option.

[Get More Characters with the External Services Schema](#)

We heard you during the beta: You need more characters to implement what you want with External Services. So we expanded the External Services schema to 100,000 characters.

[Handle More Response Codes in External Services Flows](#)

In the External Services beta, only success response codes were included as return values. Now all response codes and their related values are parsed and available when they are included in the Swagger or Interagent schema. And you can also import these values into your flows. Adding these values can make your flows easier to use if a step does not complete successfully.

Create an External Service (Generally Available)

Use External Services to connect to an outside service, invoke methods based on the external source via a flow, and import the service data into Salesforce. For example, you can connect to a credit service that determines if credit is extended to a Salesforce account. Want to know the payment terms? Use External Services. When the flow runs, the output contains the credit decision and, if applicable, the payment terms.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: External Services can also help you save time when you add users to an org. For instance, you want new users to automatically become collaborators for all external org-related applications. Create an external service and flow using inputs that you can define in your schema, such as a user ID. Then you add triggers in your flow. When a user is created, the trigger fires and adds the user as a collaborator to your other applications.

Enjoy an Improved External Services User Interface

Save time with the new streamlined user interface by entering necessary information all on the same page.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: In Setup, begin typing *external services*. Previously, you entered *integrations* to find the external services option. To register a service, select the named credential on the same page that you enter the service name and schema information.

Register a New External Service

Register a New Service
Get started by registering a new service

* Service Name
Name your service

Description
Enter a description

* Choose an Existing Named Credential

* Service Schema URL Path
Schema

Provide Complete Schema

Back Save & Next

Edit an External Service

No need to create another external service when you want to make some changes. External Services now has an edit option.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: Click the arrow in the service's Actions column, and select **Edit** for the service you want to update.

SETUP External Services
1 Items, Sorted by API Name

Register New External Service

API NAME	DESCRIPTION	ENDPOINT	CREDENTIALS	CONFIGURATION	ACTIONS
ProductSkuUpdate			vast_dusk	Complete	

Get More Characters with the External Services Schema

We heard you during the beta: You need more characters to implement what you want with External Services. So we expanded the External Services schema to 100,000 characters.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Handle More Response Codes in External Services Flows

In the External Services beta, only success response codes were included as return values. Now all response codes and their related values are parsed and available when they are included in the Swagger or Interagent schema. And you can also import these values into your flows. Adding these values can make your flows easier to use if a step does not complete successfully.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Data Protection and Privacy: Enhancements to the Individual Object

Regardless of whether you're complying with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR), track certain privacy preferences when your customers request them. Data privacy records, based on the Individual object, help you do that.

IN THIS SECTION:

[Determine Which Data Privacy Record to Retain when Merging Records](#)

We've simplified the process to merge leads and contacts that have corresponding data privacy records. If you'd prefer to always retain the most recently modified data privacy record, you can specify that preference in Setup. Just enter *Individual Settings* in the Quick Find box, and then select **Individual Settings**. Then select **Retain the most recently modified data privacy record**.

[The Individual Object Supports Standard Object Features](#)

The data privacy records you create based on the Individual object help you store certain data privacy preferences for your customers. Regardless of whether you're complying with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR), these records help you honor your customers' requests for privacy. The Individual object now supports all standard object features.

[Make Users' Personal Data Unusable by Salesforce at Their Request](#)

When users no longer want their personal data recognized in Salesforce, you can permanently scramble it with the new `System.UserManagement.obfuscateUser` Apex method. However, be careful using this method. When you invoke the method for that user, the data becomes anonymous, and you can never recover it.

SEE ALSO:

[Get Guidance for Data Protection and Privacy Regulations](#)

Determine Which Data Privacy Record to Retain when Merging Records

We've simplified the process to merge leads and contacts that have corresponding data privacy records. If you'd prefer to always retain the most recently modified data privacy record, you can specify that preference in Setup. Just enter *Individual Settings* in the Quick Find box, and then select **Individual Settings**. Then select **Retain the most recently modified data privacy record**.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions.

The Individual Object Supports Standard Object Features

The data privacy records you create based on the Individual object help you store certain data privacy preferences for your customers. Regardless of whether you're complying with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR), these records help you honor your customers' requests for privacy. The Individual object now supports all standard object features.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions.

Why: The Individual object is now a complete standard object. You can:

- Create custom actions, buttons, and links for individuals
- Create different individual record types
- Undelete an individual that you had deleted

- Use individuals with workflows or with Process Builder

Make Users' Personal Data Unusable by Salesforce at Their Request


When users no longer want their personal data recognized in Salesforce, you can permanently scramble it with the new `System.UserManagement.obfuscateUser` Apex method. However, be careful using this method. When you invoke the method for that user, the data becomes anonymous, and you can never recover it.

Where: This feature is available in Lightning Experience, Salesforce Classic, and in Enterprise, Performance, Unlimited, and Developer editions.

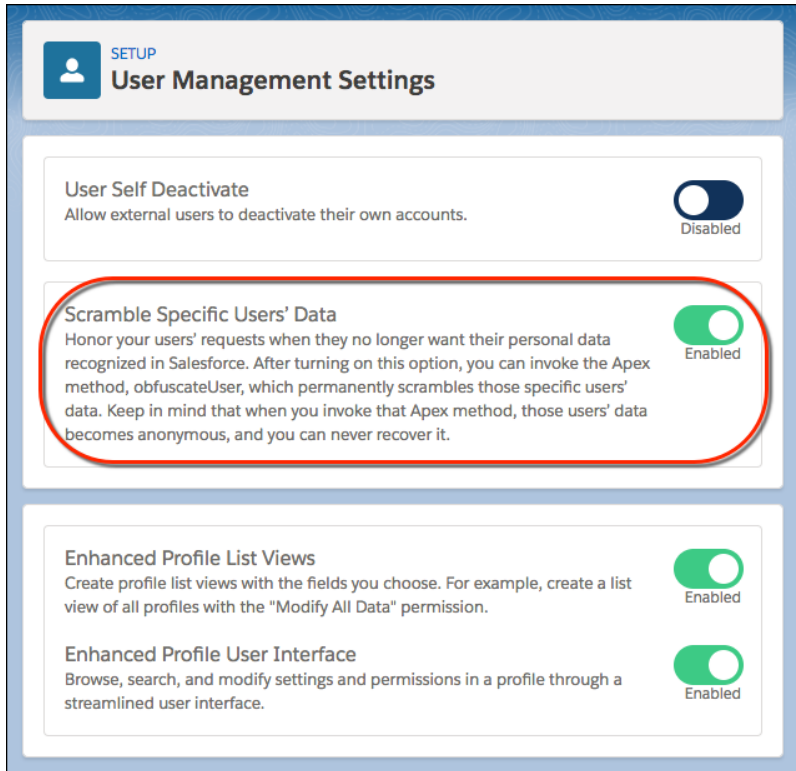
Why: For example, a departing sales rep or an external user leaving a community wants Salesforce to stop tracking their personal information. You invoke the `System.UserManagement.obfuscateUser` Apex method, which permanently scrambles the user's data and replaces it with random character strings. The user's detail page remains, but the fields contain meaningless strings of characters.

Before	After
Name Admin User	Name 1439ar3xo492
Alias jsmith	Alias rvg4mpwq583
Email jsmith@mycompany.com	Email dsgrfv2djll5@fdsfclm.com
Username jsmith@mydivision.com	Username jsomxr7@r5mpea2s.com

`obfuscateUser()` affects the standard fields of the user object, excluding a few fields, such as the user ID, time zone, locale, and profile.

 **Note:** Using this method doesn't trigger an email change notification.

How: To enable this feature, in Setup, go to User Management Settings, and select **Scramble Specific Users' Data**.



Then invoke `System.UserManagement.obfuscateUser` through Apex triggers, processes, workflows, or the Developer Console. This method changes only the user object. The association between the user and other objects is removed, but no other objects are changed. For example, contact, ThirdPartyAccountLink (TPAL), and user password authentication (UPA) objects remain unchanged.

It is recommended that you note the user's ID and other attributes for post processing, such as the email address, if you want to send the user a confirmation.

This feature is part of our effort to protect users' personal data and privacy.

SEE ALSO:

[Salesforce Help: Data Protection and Privacy](#)

Lightning Flow: Better Error Handling and Debugging, Smarter Ways to Configure and Distribute Flows

Build flows in more editions. Avoid errors and limits when processes and flows are executed in bulk. Fully integrate your flows with browsers, Lightning Console apps, and Communities. Show users where they are in a flow. Debug your flows with more details, and track usage against limits. Manipulate collections and active stages more easily with Assignment elements.

IN THIS SECTION:

[Process and Flow Design: More Ways to Use Lightning Components, Stages Generally Available, More Collection Assignment Operators](#)

Use Cloud Flow Designer to build flows in Essentials and Professional editions. Configure your flows to do things directly in browsers, such as access third-party systems without going through Salesforce servers. Display progress indicators or breadcrumbs to flow users. Manipulate and count collections and active stages with new assignment operators. Let users select date/time values in your flow screens.

[Flow Distribution: Launching Flows as Subtabs, Displaying Recommended Flows](#)

Launch the appropriate flow as a subtab in a Lightning console app when an agent takes a call. With the new Einstein Next Best Action pilot, build strategies to recommend the right flows at the right moment to the right people.

[Process and Flow Debugging: Debug Details at Runtime, Improved Error Emails, and More Log Lines](#)

Test and troubleshoot your flows with real-time debug details. See which org sent you an error email, and change who receives those emails. Monitor usage against governor limits.

[Process and Flow Runtime: Better Errors for Users, More Ways to Avoid Errors and Rollbacks](#)

Your users no longer see “failed to trigger a flow” errors when their actions launch processes that fail. We improved how we run processes and flows in bulk to help you avoid runtime errors, SOQL limits, and unnecessary transaction rollbacks.

SEE ALSO:

[Test Process and Flow Event Subscribers in Apex](#)

Process and Flow Design: More Ways to Use Lightning Components, Stages Generally Available, More Collection Assignment Operators

Use Cloud Flow Designer to build flows in Essentials and Professional editions. Configure your flows to do things directly in browsers, such as access third-party systems without going through Salesforce servers. Display progress indicators or breadcrumbs to flow users. Manipulate and count collections and active stages with new assignment operators. Let users select date/time values in your flow screens.

IN THIS SECTION:

[Build Flows in Essentials and Professional Editions](#)

Everything you love about flows is now available in Essentials and Professional editions. With these editions, you can have up to five active flows. Keep in mind that flows can integrate with other features, such as Apex and Communities, that aren't supported in these editions.

[Perform Local Actions in Flows by Using Lightning Components \(Generally Available\)](#)

Pull data from an on-premises or private cloud database directly into your flow without going through the Salesforce server. Or do things directly in the browser, such as open a particular URL or confirm that a record was created with a toast message. Local Action elements let you integrate directly with the browser by using the client-side controller of a Lightning component. This feature, which is now generally available, includes some changes since the pilot release.

[Track Progress Through a Flow with Stages \(Generally Available\)](#)

Indicate a user's point in the flow using the new stage resource and two new system variables: `$Flow.ActiveStages` and `$Flow.CurrentStage`. For example, indicate where in a purchasing flow the user is with breadcrumbs or a progress indicator. This feature, now generally available, includes some changes since the last release.

[Update Active Stages and Collections with New Assignment Operators](#)

We added several new assignment operators that make it easier to manipulate collection variables and the `$Flow.ActiveStages` system variable. Now you can easily remove specified items and truncate collections and active stages. You can count the number of collection items or active stages and store that number in a variable. You can add items to the beginning instead of only the end. You no longer need Apex code or loops to perform these operations on collections.

[Capture Date/Time Values in Flow Screens](#)

Use the new Date/Time screen field type in the Cloud Flow Designer to capture times in flows, such as when scheduling events or appointments. No Lightning components or other code required.

[See Only Supported Options in the Process Builder Field Picker](#)

Process Builder no longer displays unsupported options in the field picker. Previously, you could select unsupported fields on related objects, which sometimes caused processes to fail at run time. Now when you use the field picker, you can rest assured that your processes reference only supported fields.

SEE ALSO:

[Cloud Flow Designer Guide](#)

Build Flows in Essentials and Professional Editions

Everything you love about flows is now available in Essentials and Professional editions. With these editions, you can have up to five active flows. Keep in mind that flows can integrate with other features, such as Apex and Communities, that aren't supported in these editions.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials and Professional editions.

Perform Local Actions in Flows by Using Lightning Components (Generally Available)

Pull data from an on-premises or private cloud database directly into your flow without going through the Salesforce server. Or do things directly in the browser, such as open a particular URL or confirm that a record was created with a toast message. Local Action elements let you integrate directly with the browser by using the client-side controller of a Lightning component. This feature, which is now generally available, includes some changes since the pilot release.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. However, flows that include Lightning components are supported only in Lightning flow runtime.

Why: Let's say you have a flow that creates a case. At the end of the flow, you want the user to be redirected to the detail page of the created case. To do so, you install or build a Lightning component and add the corresponding Local Action element to your flow.

How: Local actions appear in the Cloud Flow Designer palette under the Local Actions section.

Related Updates for Developers

Lightning Components

New `lightning:availableForFlowActions` interface. The following things have changed since Winter '18.

- The interface name changed from `flowruntime:availableForFlowLocalActions` to `lightning:availableForFlowActions`.
- The interface no longer provides a `callback` function. Instead, control returns to the flow when the method finishes or when a Promise is fulfilled.

Metadata API

New enumeration value for the `actionType` field in `FlowActionCall` in the [Flow](#) metadata type.

SEE ALSO:

[Cloud Flow Designer Guide: Extend Your Flow with Lightning Components](#)

[Cloud Flow Designer Guide: Integrate with External Systems from a Flow](#)

[Lightning Components Developer Guide: Create Flow Local Actions Using Lightning Components](#)

[IdeaExchange: Flow Designer Needs a Simple Way to "End" a Flow by Navigating to a Record](#)

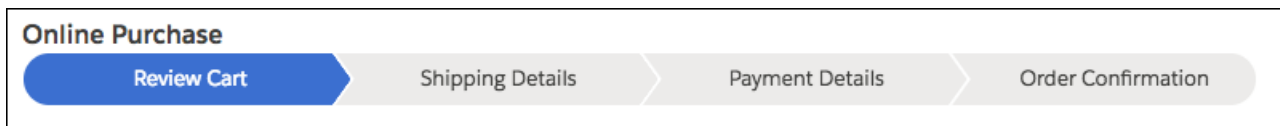
Track Progress Through a Flow with Stages (Generally Available)

Indicate a user's point in the flow using the new stage resource and two new system variables: `$Flow.ActiveStages` and `$Flow.CurrentStage`. For example, indicate where in a purchasing flow the user is with breadcrumbs or a progress indicator. This feature, now generally available, includes some changes since the last release.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, the Online Purchase flow includes stages for users to review their cart, enter shipping details, enter payment details, and confirm the order. The stages display at runtime using a custom Lightning component.

At this point, `$Flow.ActiveStages` contains the Review Cart, Shipping Details, Payment Details, and Order Confirmation stages, and `$Flow.CurrentStage` is set to Review Cart.



How: On the Resources tab, define the stages for each permutation of your flow. Throughout the flow, identify which stages are relevant to the user by assigning values to the stage system variables.

- `$Flow.ActiveStages` identifies the stages that are relevant to the flow's current path.
- `$Flow.CurrentStage` identifies at which stage the flow is. Make sure that the selected stage is included in `$Flow.ActiveStages`.

Tip: The standard flow runtime doesn't represent a flow's stages by default. However, you can build your own component that does and add it to your flow by using Lightning component screen fields. We recommend using a `lightning:progressindicator` component.

Changes Since Winter '18

- New assignment operators let you easily add and remove active stages. Another new operator counts the number of active stages and assigns that number to a variable.
- The flow error email now tracks the values of `$Flow.ActiveStages` and `$Flow.CurrentStage` throughout the flow.
- You can translate stage labels in the Translation Workbench and Metadata API.
- When you pass `$Flow.ActiveStages` or `$Flow.CurrentStage` to a Lightning component attribute, the stage label is used. Previously, the fully qualified name of the stage was used.
- When a flow interview that includes stages is paused, Salesforce stores information about the interview's current and active stages by using `FlowStageRelation` records.

Related Updates for Developers

Lightning Components

New `onstatuschange` parameters in the `lightning:flow` component.

SOAP API

New object: `FlowStageRelation`

Metadata API

New fields in the `Flow` and `Translations` metadata types.

SEE ALSO:

[Update Active Stages and Collections with New Assignment Operators](#)

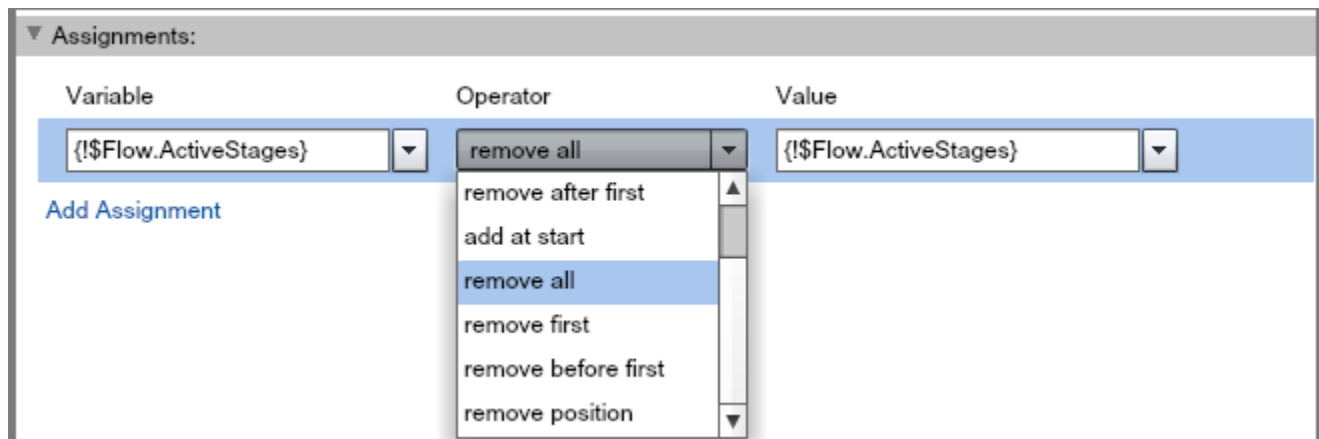
[Cloud Flow Designer Guide: Show Users Progress Through a Flow with Stages](#)

Update Active Stages and Collections with New Assignment Operators

We added several new assignment operators that make it easier to manipulate collection variables and the `Flow.ActiveStages` system variable. Now you can easily remove specified items and truncate collections and active stages. You can count the number of collection items or active stages and store that number in a variable. You can add items to the beginning instead of only the end. You no longer need Apex code or loops to perform these operations on collections.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, to clear all active stages with an Assignment element, select the **remove all** operator, and enter the `Flow.ActiveStages` system variable in both Variable and Value columns.



Here are the new assignment operators.

Operator	Updates These Variables	Description
add at start	collection variables <code>Flow.ActiveStages</code>	Adds items or stages to the beginning of the collection or active stages.

Operator	Updates These Variables	Description
equals count	number variables	Counts the number of active stages or items in a collection, and assigns that number to a variable.
remove after first	collection variables <code>\$Flow.ActiveStages</code>	Removes all items or stages after the first instance of a specified value.
remove all	collection variables <code>\$Flow.ActiveStages</code>	Removes all instances of a specified value.
remove before first	collection variables <code>\$Flow.ActiveStages</code>	Removes all items or stages before the first instance of a specified value.
remove first	collection variables <code>\$Flow.ActiveStages</code>	Removes the first instance of a specified value.
remove position	collection variables <code>\$Flow.ActiveStages</code>	Removes the item or stage at a specified position. For example, if a collection variable contains three items—Red, Green, Blue—and the assignment removes position 2, Green is removed.
remove uncommon	collection variables	Compares two collections, and removes all items that aren't common to both collections.

Also, the **add** operator can now append collections to collection variables of the same data type or object type. However, you can set such assignments only from Metadata API. From Cloud Flow Designer, you can't save an Assignment element that contains a collection variable in the Value column for the **add** operator.

Related Updates for Developers

Metadata API

New enumeration values for the `operator` field in `FlowAssignmentItem` in the [Flow](#) metadata type.

SEE ALSO:

[IdeaExchange: Size of Collections in Flow](#)

[Cloud Flow Designer Guide: Operators in Flow Assignment Elements](#)

Capture Date/Time Values in Flow Screens

Use the new Date/Time screen field type in the Cloud Flow Designer to capture times in flows, such as when scheduling events or appointments. No Lightning components or other code required.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, this flow uses a date/time value to schedule a call.

Schedule Call
Schedule a time for us to call you when you're ready.

Requested Time

Reason

Phone Number

10:30 AM
11:00 AM
11:30 AM
12:00 PM
12:30 PM
1:00 PM
1:30 PM

Pause Finish

How: In Screen elements, Date/Time appears with other input field types in the Add a Field tab.

General Info Add a Field Field Settings

INPUTS

- Textbox
- Long Text Area
- Number
- Currency
- Date
- Date/Time**
- Password
- Checkbox

CHOICES

- Radio Buttons
- Dropdown List

MULTI-SELECT CHOICES

- Multi-Select Checkboxes
- Multi-Select Picklist

OUTPUTS

- Display Text

Related Updates for Developers

Metadata API

`DateTime` is now a valid enumeration value for the `dataType` field in `FlowScreenField` in the [Flow](#) metadata type.

SEE ALSO:

[IdeaExchange: Add Date/Time Field Type to Visual Workflow](#)

See Only Supported Options in the Process Builder Field Picker

Process Builder no longer displays unsupported options in the field picker. Previously, you could select unsupported fields on related objects, which sometimes caused processes to fail at run time. Now when you use the field picker, you can rest assured that your processes reference only supported fields.

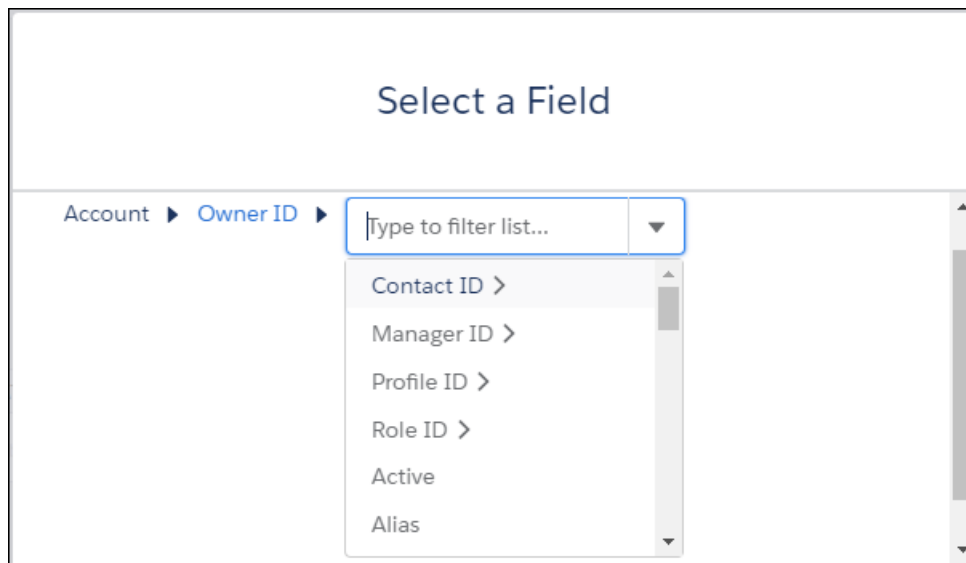
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, you could previously select the following criteria in a process associated with the Account object:

```
[Account].Owner.AboutMe Contains String 'Engineer'
```

Because the `AboutMe` field on the related User object isn't supported in an account-based process, the process fails at run time.

Now, the field picker no longer lists unsupported fields such as `AboutMe`.



SEE ALSO:

[Salesforce Help: Field Picker](#)

Flow Distribution: Launching Flows as Subtabs, Displaying Recommended Flows

Launch the appropriate flow as a subtab in a Lightning console app when an agent takes a call. With the new Einstein Next Best Action pilot, build strategies to recommend the right flows at the right moment to the right people.

IN THIS SECTION:

[Launch Flows as Subtabs in Lightning Console Apps \(Generally Available\)](#)

Guide your users through multi-step processes with Lightning Guided Engagement and the Guided Action List component. Associate records to flows using Salesforce automation tools. When a record that has an associated flow is opened in a console app, the flow is launched as a subtab. You can configure flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last.

[Use Strategies to Recommend Flows to Users and Community Members \(Pilot\)](#)

Rather than displaying all flows all the time, build recommendation strategies that display the right flows at the right moment to the right people. With recommendation strategies, you can integrate business rules, predictive models, and data—both inside and outside of Salesforce.

SEE ALSO:

[Create Business Solutions with Lightning Bolt Solutions](#)[Let Users View and Resume Paused Flows](#)[Cloud Flow Designer Guide: Distribute Your Flow](#)

Launch Flows as Subtabs in Lightning Console Apps (Generally Available)

Guide your users through multi-step processes with Lightning Guided Engagement and the Guided Action List component. Associate records to flows using Salesforce automation tools. When a record that has an associated flow is opened in a console app, the flow is launched as a subtab. You can configure flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Bring Your Service Processes to the Console with Lightning Guided Engagement \(Generally Available\)](#)

Use Strategies to Recommend Flows to Users and Community Members (Pilot)

Rather than displaying all flows all the time, build recommendation strategies that display the right flows at the right moment to the right people. With recommendation strategies, you can integrate business rules, predictive models, and data—both inside and outside of Salesforce.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.



Note: We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

SEE ALSO:

[Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#)

Process and Flow Debugging: Debug Details at Runtime, Improved Error Emails, and More Log Lines

Test and troubleshoot your flows with real-time debug details. See which org sent you an error email, and change who receives those emails. Monitor usage against governor limits.

IN THIS SECTION:

[Debug Your Flows in Cloud Flow Designer](#)

Cloud Flow Designer now offers a debug option to help you test and troubleshoot your flows. Easily set input variables, quickly restart flows, and view all the gory details of what's happening in real time as your flow executes.

[Process and Flow Error Emails: Generally Available with Org IDs and Recipient Control](#)

When a process or flow element fails to execute at run time, Salesforce sends an email with the error message and details about the executed elements. If you used this feature in beta, check out the enhancements that we made based on feedback from beta testers like you.

[Monitor Process and Flow Usage Against Per-Transaction Governor Limits](#)

Processes and flows can do powerful things, and those things often count toward your per-transaction limits. Now you can use debug logs to identify which actions contribute the most against those limits. These details help you troubleshoot errors and monitor usage as you activate and distribute your processes and flows. You can also use these details while testing processes and flows that you're building to prevent them from reaching governor limits at run time.

[Make Sure That Flow and Process Bulk Operations Are Supported](#)

To check whether flow or process bulk operations aren't executing in bulk, review the new `FLOW_BULK_ELEMENT_NOT_SUPPORTED` debug log line.

Debug Your Flows in Cloud Flow Designer


Cloud Flow Designer now offers a debug option to help you test and troubleshoot your flows. Easily set input variables, quickly restart flows, and view all the gory details of what's happening in real time as your flow executes.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. However, when you display debug details, the flow is rendered in Lightning runtime, even if Lightning runtime isn't enabled for the org.

Why: Previously, when you encountered an error while running a flow, perhaps you struggled to diagnose the root cause. Perhaps you've resorted to trial and error, wishing you could see what the flow was doing in the background. Perhaps you've manually added troubleshooting screens to display variable values that your users don't need.

Despair no more! When you debug a flow, you can:

- Easily specify the values of input variables. After running the flow, you can quickly change those values and rerun the flow.
- Choose whether subflow elements run the latest version of each referenced flow.
- View the step-by-step details of all operations, actions, and variable assignments as the flow executes them.
- At any time, even mid-run, quickly restart the flow so that you can try a different branch.

 **Warning:** Debugging a flow runs the flow and performs its actions, including DML operations and Apex code execution. As is always the case when running flows, if you close or restart a flow mid-run, previously executed actions, database changes, and callouts aren't rolled back.

How: From Cloud Flow Designer, open the flow, and click **Debug**.



Set the debug options and input variables. Then click **Run**.

Debug the flow

Debug options

- Run the latest version of each flow called by subflow elements
- Show details of what's executed and render flow in Lightning runtime ⓘ

Input variables

Enter values for the flow's input variables. For each value left blank, the flow starts with the variable's default value. You can't enter values for collection or sObject variables.

contact_first_name

contact_last_name

Run

If you opt to show details, they appear in a panel on the right.

The screenshot displays the Salesforce Lightning Flow interface. On the left, a step titled "Find Account From Contact" is shown with the input "Howard Jones's account: Acme" and a "Finish" button. On the right, the "Debug Details" panel provides a comprehensive log of the flow's execution. It starts with "How the Interview Started", indicating it was initiated by Admin User (005R0000000UF6i). It then lists variables set at the start: contact_first_name = Howard and contact_last_name = Jones. The next section, "RECORD QUERY: Find_Contact_s_Account", details a query to find a Contact record where the first name equals Howard and the last name equals Jones. The result shows a successful find with the account ID 001R0000002ahRYIAY. The final section, "RECORD QUERY: Get_Account_Name", shows a query to find an Account record by the ID 001R0000002ahRYIAY, resulting in the account name "Acme". A "Run Again" button is visible in the top right corner of the interface.

When the flow finishes running, you can change inputs or run it again with the same inputs that you previously entered.

SEE ALSO:

[IdeaExchange: Better Debugging Capability for Visual Workflows and Workflow Triggers](#)

[IdeaExchange: GUI Testing/Debugging for Process Builder & Flows](#)

[Cloud Flow Designer Guide: Why Did My Flow Interview Fail?](#)

Process and Flow Error Emails: Generally Available with Org IDs and Recipient Control

When a process or flow element fails to execute at run time, Salesforce sends an email with the error message and details about the executed elements. If you used this feature in beta, check out the enhancements that we made based on feedback from beta testers like you.

IN THIS SECTION:

[Control Who Receives Flow and Process Error Emails](#)

When a process or flow interview fails, Salesforce sends a detailed flow error email to the admin who last modified the process or flow. But perhaps that admin isn't the best person to read and act on the details of what was executed and what went wrong. Now you can send flow error emails to the Apex exception email recipients that you specify in Setup.

[Get the Org Name in Which a Flow or Process Failed](#)

We added the org name and ID in the error email so that you know which org to troubleshoot if you are managing multiple orgs.

Control Who Receives Flow and Process Error Emails

When a process or flow interview fails, Salesforce sends a detailed flow error email to the admin who last modified the process or flow. But perhaps that admin isn't the best person to read and act on the details of what was executed and what went wrong. Now you can send flow error emails to the Apex exception email recipients that you specify in Setup.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: To change where flow error emails are sent, go to the Process Automation Settings page in Setup. Then update the Send Process or Flow Error Email To field.

To specify users and email addresses as Apex exception email recipients, go to the Apex Exception Email page in Setup. Keep in mind that these users and email addresses also receive Apex exception emails.

SEE ALSO:

[IdeaExchange: Choose Who To Send Flow Fault Emails and Process Builder Error Emails To](#)

[Cloud Flow Designer Guide: Control Who Receives Flow and Process Error Emails](#)

[Cloud Flow Designer Guide: Emails About Flow Errors](#)

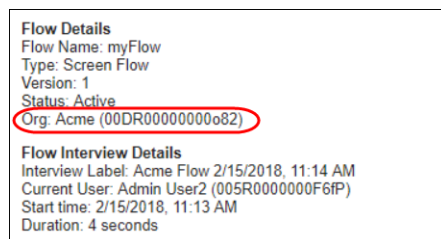
[Salesforce Help: What Happens When an Apex Exception Occurs?](#)

Get the Org Name in Which a Flow or Process Failed

We added the org name and ID in the error email so that you know which org to troubleshoot if you are managing multiple orgs.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When a process or a flow interview fails, the admin who last modified the associated process or flow gets an email about the error. The message now includes the org name and ID in the Flow Details section.



SEE ALSO:

[IdeaExchange: Include the Organization Id in Flow Instance Error Emails](#)

[Control Who Receives Flow and Process Error Emails](#)

Monitor Process and Flow Usage Against Per-Transaction Governor Limits

Processes and flows can do powerful things, and those things often count toward your per-transaction limits. Now you can use debug logs to identify which actions contribute the most against those limits. These details help you troubleshoot errors and monitor usage as you activate and distribute your processes and flows. You can also use these details while testing processes and flows that you're building to prevent them from reaching governor limits at run time.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Access debug logs from the Logs tab in the Developer Console. Or from Setup, enter *Debug Logs* in the Quick Find box. In the debug level, set Workflow to **Finer**.

Use these debug event types to monitor process and flow usage against per-transaction governor limits.

- `FLOW_START_INTERVIEW_LIMIT_USAGE`—Includes how much of a limit is used by the transaction upon starting the process or flow interview but before executing process or flow elements. Also includes the per-transaction limit.
- `FLOW_ELEMENT_LIMIT_USAGE`—Includes how much of a limit is used by the process or flow element, the total count used by the transaction after executing the element, and the per-transaction limit.
- `FLOW_BULK_ELEMENT_LIMIT_USAGE`—Includes how much of a limit is used by the element executed in bulk, the total count used by the transaction after executing the element, and the per-transaction limit.

Example:

```
...
... |FLOW_START_INTERVIEW_LIMIT_USAGE|SOQL queries: 1 out of 100
... |FLOW_START_INTERVIEW_LIMIT_USAGE|SOQL query rows: 100 out of 50000
... |FLOW_START_INTERVIEW_LIMIT_USAGE|SOSL queries: 0 out of 20
... |FLOW_START_INTERVIEW_LIMIT_USAGE|DML statements: 1 out of 150
... |FLOW_START_INTERVIEW_LIMIT_USAGE|DML rows: 10 out of 10000
... |FLOW_START_INTERVIEW_LIMIT_USAGE|CPU time in ms: 0 out of 15000
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Heap size in bytes: 0 out of 6000000
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Callouts: 0 out of 100
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Email invocations: 0 out of 10
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Future calls: 0 out of 50
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Jobs in queue: 0 out of 50
... |FLOW_START_INTERVIEW_LIMIT_USAGE|Push notifications: 0 out of 10
...
... |FLOW_ELEMENT_LIMIT_USAGE|1 DML statements, total 2 out of 150
... |FLOW_ELEMENT_LIMIT_USAGE|1 DML rows, total 11 out of 10000
...
```

Related Updates for Developers

Debug Logs

New events: `FLOW_START_INTERVIEW_LIMIT_USAGE`, `FLOW_ELEMENT_LIMIT_USAGE`, `FLOW_BULK_ELEMENT_LIMIT_USAGE`

SEE ALSO:

[Cloud Flow Designer Guide: Apex Governor Limits that Affect Flows](#)

[Salesforce Help: Process Limits](#)

[Salesforce Help: Set Up Debug Logging](#)

[Salesforce Help: Debug Logs](#)

Make Sure That Flow and Process Bulk Operations Are Supported

To check whether flow or process bulk operations aren't executing in bulk, review the new `FLOW_BULK_ELEMENT_NOT_SUPPORTED` debug log line.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Access debug logs from the Logs tab in the Developer Console. Or from Setup, enter *Debug Logs* in the Quick Find box. In the debug level, set Workflow to **Info**.

Related Updates for Developers

Debug Logs

[New event: FLOW_BULK_ELEMENT_NOT_SUPPORTED](#)

SEE ALSO:

[Salesforce Help: Set Up Debug Logging](#)

[Salesforce Help: Debug Logs](#)

Process and Flow Runtime: Better Errors for Users, More Ways to Avoid Errors and Rollbacks

Your users no longer see “failed to trigger a flow” errors when their actions launch processes that fail. We improved how we run processes and flows in bulk to help you avoid runtime errors, SOQL limits, and unnecessary transaction rollbacks.

IN THIS SECTION:

[Demystified Process Errors for Your Users](#)

Users typically don't realize that their actions, such as creating and updating records, can trigger processes that do things behind the scenes. That's why they get confused when processes fail and they're presented with cryptic error messages. The messages are now friendlier and include the process name and error ID. If the error occurs when creating or updating a record, the message also includes technical details for the user to give you to help with troubleshooting. You can use the error ID to find the detailed error email that was sent when the process failed.

[More Granular Batching for Scheduled Actions and Flow Interviews Help You Avoid Runtime Errors](#)

When Salesforce executes scheduled process actions or waiting flow interviews, it batches them together with other scheduled process actions or waiting flow interviews. Previously, a batch could include different process or flow versions started by different users. Not knowing what is included in the batch makes it hard to design processes or flows so that they don't exceed limits or execute restricted operations. To help you avoid limits, scheduled actions or waiting interviews are executed together only if they have the same execution time, the same process or flow version ID, and the same user ID that triggered the process or interview.

[Enable Flow and Process Queries to Execute in Batches \(Critical Update\)](#)

This update changes the way queries in flows and process are executed when they can be bulkified. Salesforce already bulkifies operations that create, update, or delete Salesforce records. Enabling query bulkification helps your org avoid reaching SOQL limits. If this critical update doesn't appear in your org's Critical Update console, your org already executes flow and process operations in batches.

[Enable Partial Save for Create and Update Operations in Processes \(Critical Update\)](#)

This update prevents a failed process from causing all running processes in the transaction to fail. Instead, Salesforce rolls back only the records that fail to save.

Flow Interviews End When User Sessions End

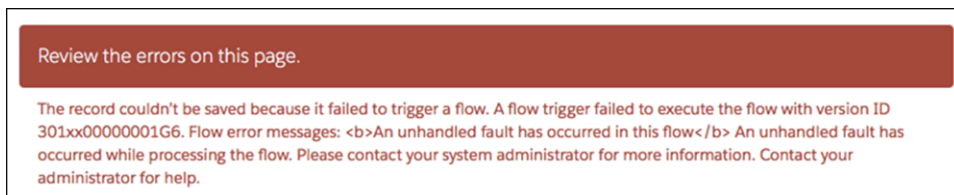
To be consistent with Classic runtime, a flow interview in Lightning runtime ends when a user is logged out. When a user session expires while a flow interview is in progress, some actions during the interview could be lost.

Demystified Process Errors for Your Users

Users typically don't realize that their actions, such as creating and updating records, can trigger processes that do things behind the scenes. That's why they get confused when processes fail and they're presented with cryptic error messages. The messages are now friendlier and include the process name and error ID. If the error occurs when creating or updating a record, the message also includes technical details for the user to give you to help with troubleshooting. You can use the error ID to find the detailed error email that was sent when the process failed.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, here's what a user would see while creating a lead and a process tries to create a related opportunity that fails a validation rule. Notice the unhelpful flow version ID and redundant statements about unhandled faults and contacting your admin. Sorry about that.



Now, for that same validation error, users get information that they can act on. Users for whom the information is too complex can share it with their admins to help troubleshoot.



SEE ALSO:

[IdeaExchange: Process Builder: Error Messages](#)

[Salesforce Help: What Happens When a Process Fails?](#)

[Control Who Receives Flow and Process Error Emails](#)

More Granular Batching for Scheduled Actions and Flow Interviews Help You Avoid Runtime Errors

When Salesforce executes scheduled process actions or waiting flow interviews, it batches them together with other scheduled process actions or waiting flow interviews. Previously, a batch could include different process or flow versions started by different users. Not knowing what is included in the batch makes it hard to design processes or flows so that they don't exceed limits or execute restricted operations. To help you avoid limits, scheduled actions or waiting interviews are executed together only if they have the same execution time, the same process or flow version ID, and the same user ID that triggered the process or interview.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: We execute a batch of scheduled actions or waiting interviews in a single transaction. If a scheduled action causes a process to fail, the scheduled action can prevent the execution of other scheduled actions in the same batch. By reducing the scope of each batch, your processes and flows are less likely to hit governor limits or mixed DML errors.

Use Case	Spring '18 and Earlier	Summer '18 and Later
A process has a scheduled action that executes 50 SOQL queries. Three sets of the scheduled action have the same execution time, but they were triggered by three different users.	The scheduled actions for all three users are batched together and executed in the same transaction. The process fails because the transaction exceeds the Apex governor limit of 100 SOQL queries per transaction.	The scheduled actions are batched together per user, so they're executed in three separate transactions. Each transaction stays below the Apex governor limit of 100 SOQL queries per transaction.
The following scheduled actions have the same execution time. <ul style="list-style-type: none"> A scheduled action from one process that updates an account A scheduled action from another process that updates a user role 	Both scheduled actions are batched together in the same transaction. The batch fails because a single transaction can't execute DML operations on both standard and Setup objects.	The scheduled actions are batched together per process and executed in two transactions. The two batches succeed because the DML operations for standard objects are executed separately from the DML operations for Setup objects.


Enable Flow and Process Queries to Execute in Batches (Critical Update)

This update changes the way queries in flows and process are executed when they can be bulkified. Salesforce already bulkifies operations that create, update, or delete Salesforce records. Enabling query bulkification helps your org avoid reaching SOQL limits. If this critical update doesn't appear in your org's Critical Update console, your org already executes flow and process operations in batches.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Programmers can design their code so that similar actions are performed together in one batch. For example, you can create 50 records with one operation rather than 50 separate operations. We call this concept *bulkification*. Even with no-code flows and processes, bulkification can prevent you from reaching governor limits because the batch is counted as only one operation. An operation is bulkifiable if it sends emails or creates, updates, deletes, or looks up records.

When multiple interviews for the same flow or process run in one transaction, each interview runs until it reaches a bulkifiable operation. Salesforce defers that operation until all interviews in the transaction reach that same operation. Then Salesforce executes that operation for all the interviews together.

 **Note:** Some objects, like UserRecordAccess and IdeaComment, don't support bulk operations. For those objects, Salesforce executes the operations one by one.

In flows, queries are generated when executing:

- Record Update elements
- Record Delete elements
- Record Lookup elements
- Fast Lookup elements
- Subflow elements whose referenced flows create queries
- Apex elements whose referenced Apex code creates queries

In processes, queries are generated when executing:

- Update Records actions
- Flows actions whose referenced flows create queries
- Apex actions whose referenced Apex code creates queries

Without this update enabled, Salesforce defers bulkifiable queries but doesn't execute them in batches. Instead, it executes the queries one by one. The debug logs for your processes and flows include events that start with `FLOW_BULK_ELEMENT`, which indicate that Salesforce deferred the query to batch it with similar queries. Nevertheless, Salesforce executes each bulkifiable query one by one instead of in a batch.

For example, when you upload 100 cases, the Activity Management flow starts for each case, resulting in 100 interviews.

- 50 interviews stop at Record Lookup element Look Up Events.
- The other 50 interviews stop at Record Lookup element Look Up Tasks.

Without this update	With this update
Every query is executed separately, resulting in 100 query operations.	The queries are executed in two batches, resulting in two query operations. <ul style="list-style-type: none"> • One for the 50 interviews that execute Look Up Events • One for the 50 interviews that execute Look Up Tasks

How: To test this critical update, we recommend working in a sandbox. If you must work in your production org, do so during off-peak hours.

1. From Setup, enter *critical* in the Quick Find box, then select **Critical Updates**.
2. For Enable Flow and Process Queries to Execute in Batches, click **Activate**.
3. Test all your flows and processes.

If you experience any issues, contact Salesforce Customer Support.

SEE ALSO:

[Critical Updates](#)

Enable Partial Save for Create and Update Operations in Processes (Critical Update)

This update prevents a failed process from causing all running processes in the transaction to fail. Instead, Salesforce rolls back only the records that fail to save.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: When batches of records are created or updated, the processes that they trigger can fail and block records from being saved. Previously, if a failed process blocks one record in a batch from being saved, all records in the batch aren't saved. With this critical update, Salesforce rolls back only the records whose processes failed and tries three times to save the records whose processes succeeded. This functionality is called "partial save."

Even with this critical update, some types of process errors roll back the entire batch. The entire batch is always rolled back when one of these actions causes the error.

- An action in a platform-event process

- An action in an invocable process
- A scheduled action in a record-change process
- An immediate action that follows the “all or nothing” rule in a record-change process

This table shows which immediate actions follow the all or nothing rule in record-change processes.

Immediate Process Actions	Without This Update	With This Update
Apex	Depends on code	Depends on code
Create a Record	All or nothing	Partial save
Email Alerts	All or nothing	All or nothing
Flows	All or nothing	All or nothing
Post to Chatter	All or nothing	All or nothing
Processes	All or nothing	All or nothing
Quick Actions	All or nothing	All or nothing
Submit for Approval	All or nothing	All or nothing
Update Records	All or nothing	Partial save

For example, when you create an account, a process on Account creates an opportunity and sets its opportunity amount to the account revenue. A validation rule on Opportunity requires that the opportunity amount is greater than zero. When you use Data Import Wizard to import 100 accounts, and one of the accounts has revenue set to zero, the process fails to create an opportunity for that account.

Without this critical update, none of the 100 accounts and opportunities are created. The action to create an opportunity for each account is executed in bulk and follows the all or nothing rule. When the bulk operation fails to create an opportunity for the one account with zero revenue, the entire batch is rolled back.

With this critical update, 99 accounts and opportunities are created successfully. Because of partial save, only the one account with zero revenue fails to create a related opportunity, and the creation of that account is rolled back.

How: To test this critical update, we recommend working in a sandbox. If you must work in your production org, do so during off-peak hours.

1. From Setup, enter *Critical* in the Quick Find box, then select **Critical Updates**.
2. For Enable Partial Save for Create and Update Operations in Processes, click **Activate**.
3. Test all your flows and processes.

If you experience issues, contact Salesforce Customer Support.

SEE ALSO:

[IdeaExchange: Process Builder - All or None](#)

[Critical Updates](#)

Flow Interviews End When User Sessions End

To be consistent with Classic runtime, a flow interview in Lightning runtime ends when a user is logged out. When a user session expires while a flow interview is in progress, some actions during the interview could be lost.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Interviews don't perform actions, such as sending emails or creating, editing, or deleting records, until the associated transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

When an interview is in progress, the data in the interview isn't saved to the Salesforce database. If the interview executed an element that created or updated records, only the information configured in that element is saved to the Salesforce database.



Tip: To avoid interrupting flows at runtime:

- Set your session settings to log out users after an appropriate period of time.
- Encourage your users to pay attention during interviews for alerts about their sessions expiring soon.
- Remind users to avoid running flows during release upgrades. A typical upgrade takes about 5 minutes.

Lightning App Builder: Broken Components That Don't Break Pages, Pinned Regions in the Console Sidebar, and New Components

A broken component on a Lightning page gets dropped instead of breaking the page. To save your users from switching between pages to get information that they need, use pinned regions in the console sidebar. Enhance your Lightning user profile pages with a Badges component. And use a host of new components to better manage emails and tabs in your Lightning for Outlook email application panes.

IN THIS SECTION:

[Broken Components No Longer Break Lightning Pages](#)

Having a broken component on a Lightning page used to prevent the page from displaying successfully. We fixed that! Now broken components are dropped from the page when it renders. The page displays without them, and an error appears informing you of the broken component.

[Add Pinned Regions to Your Console Sidebars](#)

A pinned region remains displayed as you navigate to subtabs in a Lightning console app. Users don't need to toggle between pages to get information. To let users view and work with record information in pinned sidebars, use the Console: Pinned Left and Right Sidebars record page template.

[Show Earned Trailhead Badges with the Badges Lightning Component](#)

Lightning developers can give their users a ready view of their accomplishments. Add the Badges Lightning component to user profile pages to show a user's earned Trailhead badges. In production, the component picks up user identification from the user profile page, so no configuration is needed.

[New Components for Email Application Panes](#)

Use new Lightning App Builder components when creating custom email application panes for Lightning for Outlook.

[Recommend Actions and Offers to Lightning Users \(Pilot\)](#)

Add the new Einstein Recommendations component to run a strategy that determines which propositions to display to your Lightning users. Propositions can serve any purpose, such as providing a common action or a special offer. When setting up a strategy, you can determine conditions for displaying a given proposition. This component is available as part of the Einstein Next Best Action pilot.

[Deliver a CSRF-Protected Visualforce Page with a Lightning Component](#)

Selecting the **Require CSRF Protection on GET requests** option on your Visualforce page adds an extra layer of security by guarding against cross-site request forgery (CSRF). The Visualforce Page Lightning component now supports Visualforce pages that have this setting enabled.

Broken Components No Longer Break Lightning Pages

Having a broken component on a Lightning page used to prevent the page from displaying successfully. We fixed that! Now broken components are dropped from the page when it renders. The page displays without them, and an error appears informing you of the broken component.

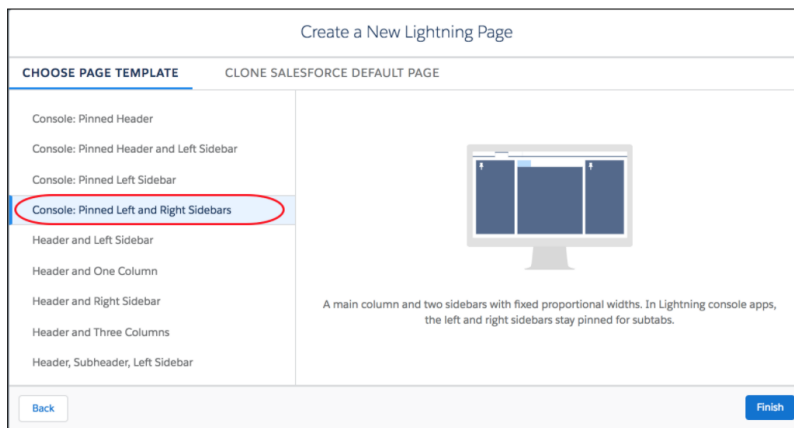
Where: This change applies to Lightning Experience and the Salesforce mobile app in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Add Pinned Regions to Your Console Sidebars

A pinned region remains displayed as you navigate to subtabs in a Lightning console app. Users don't need to toggle between pages to get information. To let users view and work with record information in pinned sidebars, use the Console: Pinned Left and Right Sidebars record page template.

Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To create a console page with the new template, in the Lightning App Builder, select the **Console: Pinned Left and Right Sidebars** template.



Note: This template also works in apps with standard navigation. However, we recommend that you use a non-pinned region template in standard apps because they don't benefit from a pinned region.

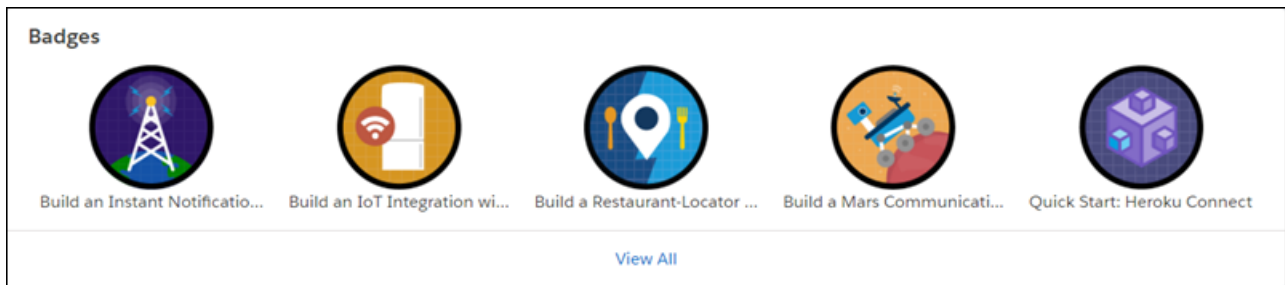
Show Earned Trailhead Badges with the Badges Lightning Component

Lightning developers can give their users a ready view of their accomplishments. Add the Badges Lightning component to user profile pages to show a user's earned Trailhead badges. In production, the component picks up user identification from the user profile page, so no configuration is needed.

Where: This change applies to Lightning Experience and the Salesforce app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

Who: When the Badges component is placed on a user profile page, it appears to all users who have access to the profile. The information that appears in the component depends on a few things. Up to five badges appear in the component when it's placed in a wide area of the page. Up to three badges appear in the component when it's placed in a narrow area of the page. A View All link at the bottom of the component links to the user's Trailhead profile page. Badges appear if the user has earned badges and their Trailhead profile is public. If the user's Trailhead profile is private, the component respects it, and no badges are shown.

Why: The Badges Lightning component gives your users a way to show off the badges they've earned and to see the badges of other users. What a morale booster to open your profile and see badges for all the hard work you've done and all the knowledge you've acquired!



How: Add the Badges component through the Lightning App Builder.

New Components for Email Application Panes

Use new Lightning App Builder components when creating custom email application panes for Lightning for Outlook.

Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.


SEE ALSO:

[Use New Components to Build Custom Email Application Panes](#)

Recommend Actions and Offers to Lightning Users (Pilot)

Add the new Einstein Recommendations component to run a strategy that determines which propositions to display to your Lightning users. Propositions can serve any purpose, such as providing a common action or a special offer. When setting up a strategy, you can determine conditions for displaying a given proposition. This component is available as part of the Einstein Next Best Action pilot.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

Who: When a user clicks a proposition button, a screen flow is launched. To run a flow, your users must have either the Run Flows permission or the Flow User field enabled on the user detail page.

SEE ALSO:

[Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#)

Deliver a CSRF-Protected Visualforce Page with a Lightning Component

Selecting the **Require CSRF Protection on GET requests** option on your Visualforce page adds an extra layer of security by guarding against cross-site request forgery (CSRF). The Visualforce Page Lightning component now supports Visualforce pages that have this setting enabled.

Where: This change applies to Lightning Experience and the Salesforce mobile app in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Fields: Time Field Type Generally Available and Prediction Values Display in Number Fields (Beta)

All editions get the time custom field type. Admins using Einstein Prediction Builder get more control over the field displaying the prediction value.

IN THIS SECTION:

[Track Time with the Time Field Type \(Generally Available\)](#)

The time field type tracks time that is not specific to a single date, such as preferred contact hours. Use it for time management, event planning, and project management. You can use the Time data type in formulas and for validation rules. This feature was a beta release in Spring '18 and is now generally available with some improvements and enhancements.

[Show Einstein Predictions Where You Want Them \(Beta\)](#)

Einstein Prediction Builder generates probabilities and predictions, like how likely a customer pays an invoice on time. Einstein Prediction Builder can add a number field to an object to display these predictions where you want them, or you can create the field yourself.

Track Time with the Time Field Type (Generally Available)

The time field type tracks time that is not specific to a single date, such as preferred contact hours. Use it for time management, event planning, and project management. You can use the Time data type in formulas and for validation rules. This feature was a beta release in Spring '18 and is now generally available with some improvements and enhancements.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Why: The time field type is a timestamp minus the date. Use it for tracking things like business operating hours. For example, you can display a hotel's available check-in and check-out times.

The screenshot shows a form titled 'Information' with three time-related fields:

- Hotel Name:** Cloud Inn
- Check-In Time:** 4:00 PM
- Check-Out Time:** 12:00 PM (with a dropdown menu open showing options: 11:45 AM, 12:00 PM (checked), 12:15 PM, 12:30 PM, 12:45 PM)

Improvements since the previous release:

- Lightning UI components support time fields.
- In Lightning Experience and the Salesforce mobile app, time fields display as picklists. Previously, users had to type in a time value.
- You can convert time fields to text or number fields.
- When you filter time values for reports, you no longer need to include seconds or milliseconds.
- Previously, subtraction of two time fields could result in a negative value. Now, subtraction is always a positive value on a 24-hour clock. For example, when calculating the number of hours a business is open, you use the following formula (also taking into account each hour is 3,600,000 milliseconds): $(\text{ClosedTime} - \text{OpenTime}) / 3600000$.

ClosedTime = 5 PM, OpenTime = 8 AM, ClosedTime - OpenTime = 9 hours

ClosedTime = 5 AM, OpenTime = 7 AM, ClosedTime - OpenTime = 22 hours

ClosedTime = 5 AM, OpenTime = 11 PM, ClosedTime - OpenTime = 6 hours

How: Select the Time field type when you create a custom field. That's it!

For more customization, use the Time data type in formulas and for validation rules. For example, you want to track recurring volunteer shifts. Create a custom field using the Time field type for the start of the shift. The field label is Shift Starts, and the API name is Shift_Start_Time.

All shifts are four hours, and you want to display when the shift ends. Add a custom field using the Formula field type that returns the Time data type. Use milliseconds for time in formulas (four hours equals 14,400,000 milliseconds), and you get the following formula for the Shift Ends field.

```
Shift_Start_Time__c + 14400000
```

Your fields look like the following.

Shift Name	Animal Care
Shift Starts	3:15 PM
Shift Ends	7:15 PM

Set a time field default value using a formula and the HH:MM:SS.MS format, such as `TIMEVALUE ("10:30:00.000")` for 10:30 AM.

Use the new `TIMEVALUE` and `TIMENOW` functions and the new `HOUR`, `MINUTE`, `SECOND`, and `MILLISECOND` functions for calculations related to time.

For example, if the Shift Ends field is another time field, the following validation rule ensures that a shift can't be less than four hours.

```
Shift_Ends_Time__c <= (Shift_Start_Time__c + 14400000)
```

Be aware of the following when using a time field type.

- You can't add the field to records in automated flows created in Cloud Flow Designer or processes designed in Process Builder.
- It isn't supported in Schema Builder.
- The time field type doesn't support the creation of custom indexes for SOQL queries.
- It isn't available for standard lookup relationships in external objects.

SEE ALSO:

[Salesforce Help: Time Custom Field](#)


[IdeaExchange: Custom Time Field](#)

Show Einstein Predictions Where You Want Them (Beta)

Einstein Prediction Builder generates probabilities and predictions, like how likely a customer pays an invoice on time. Einstein Prediction Builder can add a number field to an object to display these predictions where you want them, or you can create the field yourself.


Who: This feature is available to admins with the EinsteinBuilderFree license.

Where: This change applies to both Lightning Experience and Salesforce Classic. Available in Enterprise, Unlimited, and Developer editions. Prediction fields are available for all custom objects and some standard objects. See Salesforce Help for the list of supported standard objects.

 **Note:** As a beta feature, Einstein Prediction Builder is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Einstein Prediction Builder in the [Salesforce Einstein group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

Why: The prediction field setting gives admins more control over when to create the field. And, the Apex API and Metadata API allows developers to check for the setting with code.

How: When you create the number field yourself, select the **AI Prediction** checkbox. After the field is enabled, use Einstein Prediction Builder to establish the value you want to display in the field.

 **Note:** When Einstein Prediction Builder creates the field for you, the field is visible to all profiles.

Whether Einstein Prediction Builder creates the field for you, or you do it on your own, these fields have the following limitations.

- The number of decimal places and the character length of the number field must match the settings in Einstein Prediction Builder. Einstein Prediction Builder handles these settings for you when it creates the field. If you create the field, ensure that the number and length match the prediction in Einstein Prediction Builder.
- To create and grant permissions to the field, the Manage Profiles and Permission Sets permission is required. Typically, this permission is set as part of the Customize App permission, but large orgs might keep Manage Profiles and Permission Sets separate.
- The field value changes only when new predictions are made about the corresponding object. Value changes in this field do not trigger Process Builder or Apex triggers.
- You can't disable the field setting. If you have to replace it, delete it and create another field.
- You can't delete a prediction field if Einstein Prediction Builder is still referencing it.
- You can't convert number fields enabled as AI prediction fields to other field types.
- The Roll-Up Summary field type does not support AI prediction fields.
- The custom field setting is available in Salesforce Classic, but Einstein Prediction Builder is available only in Lightning Experience.
- Fields enabled as AI prediction fields included in packages are not uploaded, so they can't be distributed in packages.

SEE ALSO:

[Einstein Prediction Builder: Enjoy Custom AI Without Code \(Beta\)](#)

[Metadata API](#)

[Changed Apex Classes](#)

Salesforce Connect: Custom HTTP Headers, Triggers on External Objects (Beta), and More

We're adding some great new tools for interacting with your external data systems. Now you can define and activate custom HTTP headers to pass more request information to OData 2.0 and 4.0 external data sources for processing. With the OData 4.0 adapter for Salesforce Connect, now a public beta release, you can react to changes made to data that's stored outside Salesforce. And to top it off, the fields we added and updated for tracking Salesforce Connect callouts to external systems are generally available.

IN THIS SECTION:

[Pass More Context Information to External Systems with Custom HTTP Headers](#)

Now you can define and activate custom HTTP headers to pass more request information to OData 2.0 and 4.0 external data sources for processing. Custom HTTP headers provide context information from Salesforce, such as region, org details, or the role of the person viewing the external object.

[Use Triggers to Track Data Changes on External Objects with the OData 4.0 Adapter \(Beta\)](#)

No need to build your own business logic with triggers that react to data changes on external standard and custom objects. With the OData 4.0 adapter for Salesforce Connect, you can track changes made to data that's stored outside your Salesforce org. You can then set up your org to react to those changes to increase productivity or provide a better experience for your customers. Adding triggers to external objects was a pilot release in Winter '18 and is now in beta.

[Related Updates for Developers](#)

Pass More Context Information to External Systems with Custom HTTP Headers

Now you can define and activate custom HTTP headers to pass more request information to OData 2.0 and 4.0 external data sources for processing. Custom HTTP headers provide context information from Salesforce, such as region, org details, or the role of the person viewing the external object.


Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition. Available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: For each OData external data source, define up to 10 HTTP headers to request data. For example, to see who's making a callout to the external data source, use a formula that resolves to the name of the user.

Use Triggers to Track Data Changes on External Objects with the OData 4.0 Adapter (Beta)

No need to build your own business logic with triggers that react to data changes on external standard and custom objects. With the OData 4.0 adapter for Salesforce Connect, you can track changes made to data that's stored outside your Salesforce org. You can then set up your org to react to those changes to increase productivity or provide a better experience for your customers. Adding triggers to external objects was a pilot release in Winter '18 and is now in beta.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition. Available for an extra cost in Enterprise, Performance, and Unlimited editions.

 **Note:** As a beta feature, triggers on external objects is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for triggers on external objects in the Lightning Connect Trailblazer Community. For information on enabling this feature in your org, contact Salesforce.

Why: For example, your company has different IT systems to manage things like orders, shipments, inventory, and billing. When prices drop from your suppliers, Salesforce notifies you and then you can let valued customers know about the bargain prices.

For each external object that has triggers added, Salesforce creates a topic channel and an associated change event entity where change event notifications are published. You add a subscriber to each topic channel and process the data changes through the Streaming API. You can also add an Apex trigger that is called when change event notifications are published.

How: Enable triggers on external objects by selecting to track data changes for an object. After you enable change tracking, a publication channel is created under the topic for the external object. For example, `/data/<Object Name>__ChangeEvent` would appear as `data/Products__ChangeEvent`, where `Products` is the object name. Salesforce polls the external system at configurable intervals (5–30 minutes) for tracked changes.

Use Apex triggers to subscribe to change events. Or you can use a Bayeux client to subscribe to the Streaming API on the publication channel. After subscribing, observe change event notifications after you perform a DML operation on an external object. Changes to the external object from within Salesforce and changes made outside of Salesforce are tracked.

Related Updates for Developers

API

New object type, `CustomHTTPHeader`.

Metadata API

New field on the `ExternalDataSource` metadata type: [customHttpHeaders](#).

External Events

New fields on [External Cross-Org Callout](#), [External Custom Apex Callout](#), and [External OData Callout](#) events are generally available.

General Setup: Lightning Bolt Solutions and Enhancements for Actions and Approvals

Easily publish turnkey solutions that include Lightning apps, Lightning communities, and flows. For quick actions, you have more ways to set predefined values for picklist fields and translated success messages. The sender for approval request emails now support organization-wide addresses.

IN THIS SECTION:[Create Business Solutions with Lightning Bolt Solutions](#)

Build a Lightning Bolt Solution to jump-start new installations and publish customized business solutions. Whether it's for your own orgs or you're a consulting partner or ISV, a Lightning Bolt Solution lets you build and launch solutions quickly.

[Override the Sender for Approval Request Email Notifications](#)

By default, the sender for email notifications about approval requests is the user who submitted for approval. Now you can override the sender with an organization-wide address, like `approval@acmewireless.com`, from your process automation settings.

[Use a Formula to Set a Predefined Value for a Picklist Field on an Action](#)

We doubled the ways you can set a predefined value for a picklist field on a quick action. You can specify an item from the set of picklist values, or use a formula to set a second predefined value. If you're hesitating to move to Lightning Experience because you're using JavaScript to set predefined field values, that roadblock is now gone!

[Data Loader 43.0 Keeps Your Data More Secure](#)

Data Loader now keeps your passwords more secure through better encryption and a user-generated encryption key file. Data Loader also keeps sensitive files away from prying eyes and in a more secure location – your personal folder. There are changes to the Data Loader configuration process.

[Show Translated Custom Quick Action Success Messages Using the Translation Workbench](#)

Previously, if you created a translation for a custom quick action success message using the Translation Workbench, that translation didn't appear when it should have. We fixed that issue, and custom success message translations appear when they're supposed to.

[View Object Details for Standard Permission Sets](#)

If you have a permission set license, you can now view object permissions for the standard permission sets associated with your permission set license. This visibility can help you more easily understand what permissions an assignee to the permission set has. Previously, you could not view standard permission set object permissions. To view the permissions, use either the user interface or the Metadata API.

[Evaluate Your App's Performance with Optimizer \(Beta\)](#)

Discover ways to make your app's record pages perform better with a specialized version of Salesforce Optimizer. This pared-down version only looks at the app that it's launched from. It evaluates the structure of the app's record pages and the usage and placement of the components. The Optimizer report provides best practices and suggestions for improving performance and the end-user experience.

[Updated Currency Codes](#)

We support the updated currency codes for the Belarusian ruble—changed from BYR to BYN—and the Mauritania Ouguiya—changed from MRO to MRU. To preserve the history of a previous currency and use all these currency codes (BYR, BYN, MRO, MRU), enable multiple currencies.

[Peruvian Currency Format Updated](#)

Starting with Summer '18, Salesforce supports the updated currency format for the Peruvian sol. The currency format has changed from 1.234,56 to 1,234.56.

[Retrieve Custom Setting List Views Using the Metadata API](#)

Retrieve custom setting list views using the Metadata API so that when you retrieve packages, custom setting list views are included.

[Custom Buttons Used as Actions on Page Layouts Can No Longer Be Deleted](#)

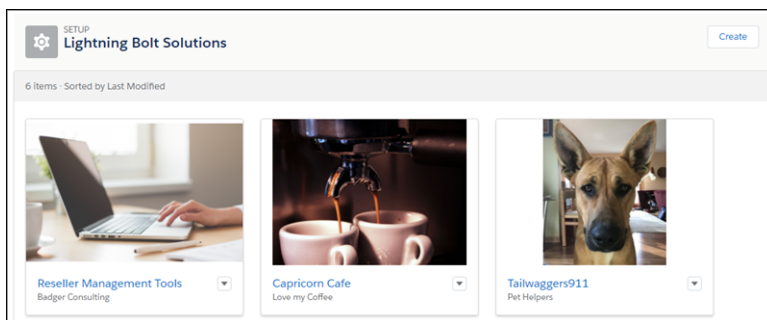
Because a page layout can be corrupted when you delete a custom button that was assigned as an action in the Salesforce Mobile and Lightning Experience Actions section, we now prevent the deletion.

Create Business Solutions with Lightning Bolt Solutions

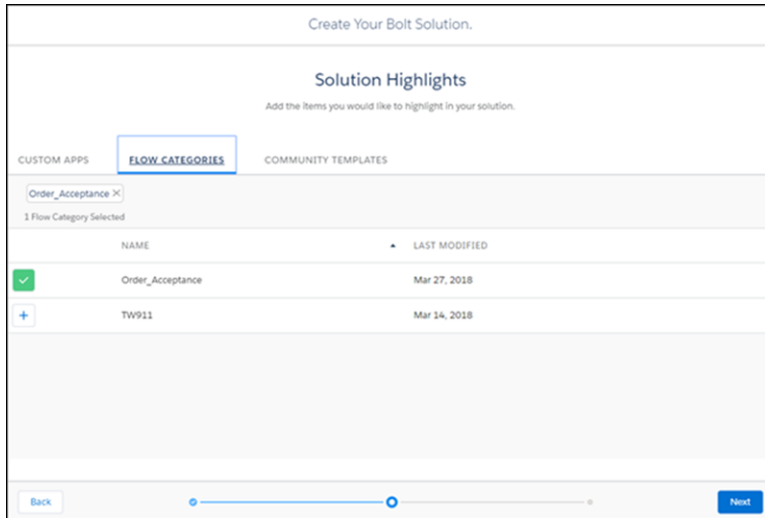
Build a Lightning Bolt Solution to jump-start new installations and publish customized business solutions. Whether it's for your own orgs or you're a consulting partner or ISV, a Lightning Bolt Solution lets you build and launch solutions quickly.

Where: This change applies to Lightning Experience in all editions.

Why: Use a Lightning Bolt Solution to create solutions to share or sell with other communities, orgs, or on AppExchange. A Lightning Bolt Solution is a powerful new framework to build and distribute industry-specific solutions. It speeds time-to-market so that you can rapidly deploy custom Lightning apps, business processes, and Lightning communities and portals.



How: Add one or more custom Lightning apps, flows, Lightning Community templates, components, or pages to your Lightning Bolt Solution. If you want to include flows, organize them first into flow categories, and add the categories to your solution. You can distribute apps and flows without a community template, or include one when you want to apply a certain look and feel. Package your solution to publish it in other orgs or on AppExchange.

**SEE ALSO:**

[Salesforce Help: Lightning Bolt Solutions: Build Once, Then Distribute and Reuse \(can be outdated or unavailable during release preview\)](#)

[Launch Business Solutions Quickly Using Lightning Bolt Solutions](#)

Override the Sender for Approval Request Email Notifications

By default, the sender for email notifications about approval requests is the user who submitted for approval. Now you can override the sender with an organization-wide address, like `approval@acmewireless.com`, from your process automation settings.

Where: This change applies to both Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, Contact Manager, and Developer editions.

SEE ALSO:

[IdeaExchange: Ability to Change the From Email Address in Approval Processes](#)

Use a Formula to Set a Predefined Value for a Picklist Field on an Action

We doubled the ways you can set a predefined value for a picklist field on a quick action. You can specify an item from the set of picklist values, or use a formula to set a second predefined value. If you're hesitating to move to Lightning Experience because you're using JavaScript to set predefined field values, that roadblock is now gone!

Where: This change applies to both Lightning Experience and Salesforce Classic. This change is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer editions.

How: You can use a formula to set a predefined value only for single-select picklist fields. When you set both kinds of predefined values, a valid formula value takes precedence over the specific value when the quick action is invoked.

Data Loader 43.0 Keeps Your Data More Secure

Data Loader now keeps your passwords more secure through better encryption and a user-generated encryption key file. Data Loader also keeps sensitive files away from prying eyes and in a more secure location – your personal folder. There are changes to the Data Loader configuration process.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.


How: From Setup, in the Quick Find box, enter *Data Loader*, and then select **Data Loader**. Download and install Data Loader for Mac or Windows.

If you use the Data Loader command-line interface, there are new and changed steps in the configuration process:

1. Generate an encryption key file from the command line. See [Data Loader Guide: Step One: Create the Encryption Key](#).
2. Generate a new encrypted password using the encryption key file. See [Data Loader Guide: Step Two: Create the Encrypted Password](#).
3. Update the process-conf.xml file with two required parameters. See [Data Loader Guide: Data Loader Process Configuration Parameters](#).
 - `<entry key="sfdc.password" value="xxxxx" />` Use your encrypted password.
 - `<entry key="process.encryptionKeyFile" value="c:\Users\{user}\.dataloader\dataLoader.key"/>` Enter your encryption key file directory.

Data Loader now stores the config.properties file in a more secure location:

- Windows: C:\Users\{user}\AppData\Local\salesforce.com\Data Loader {version}\conf
- Mac: /Users/{user}/Library/Preferences/salesforce.com/Data Loader {version}/conf

 **Note:** To use your previous config.properties file with Data Loader 43.0, copy and paste it to the new location.

SEE ALSO:

[Data Loader Guide](#)

Show Translated Custom Quick Action Success Messages Using the Translation Workbench

Previously, if you created a translation for a custom quick action success message using the Translation Workbench, that translation didn't appear when it should have. We fixed that issue, and custom success message translations appear when they're supposed to.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app. This change is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer editions.

View Object Details for Standard Permission Sets

If you have a permission set license, you can now view object permissions for the standard permission sets associated with your permission set license. This visibility can help you more easily understand what permissions an assignee to the permission set has. Previously, you could not view standard permission set object permissions. To view the permissions, use either the user interface or the Metadata API.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Contact Manager, Professional, Group, Enterprise, Performance, Unlimited, Developer, and Database.com editions. The availability of each permission set license depends on the edition requirements for permission sets and the related feature.

How: For example, here are the object permissions from the Survey Creator standard permission set.

Permission Set

Survey Creator

⋮
Clone
Manage Assignments

[Permission Set Overview](#) > **Object Settings** ▼


Object Settings

Object Name	Object Permissions
Scorecard Associations	No Access
Survey Invitations	Read, Create, Edit, Delete
Survey Responses	Read, Create, Edit, Delete
Surveys	Read, Create, Edit, Delete

Evaluate Your App's Performance with Optimizer (Beta)

Discover ways to make your app's record pages perform better with a specialized version of Salesforce Optimizer. This pared-down version only looks at the app that it's launched from. It evaluates the structure of the app's record pages and the usage and placement of the components. The Optimizer report provides best practices and suggestions for improving performance and the end-user experience.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, checking app performance with Salesforce Optimizer is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only based on generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

Who: To launch Optimizer, you need the Customize Application, Modify All Data, AND Manage Users permissions.

To receive the email that contains your Optimizer report, you need the API Enabled permission. And, in Setup, Email Delivery set to the access level All Email.

How: To check your app's performance, go to the App Manager in Setup. Edit a Lightning app, and on the App Performance (BETA) tab, click **Run Optimizer for this App**.

SEE ALSO:

[Salesforce Help: Improve Your Salesforce Implementation with Optimizer \(can be outdated or unavailable during release preview\)](#)

Updated Currency Codes

We support the updated currency codes for the Belarusian ruble—changed from BYR to BYN—and the Mauritania Ouguiya—changed from MRO to MRU. To preserve the history of a previous currency and use all these currency codes (BYR, BYN, MRO, MRU), enable multiple currencies.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Database.com, and Developer editions.

How: In Setup, enter *Company Information* in the Quick Find box, select **Company Information**, and click **Edit**. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Select **Activate Multiple Currencies**, and then save your changes.

SEE ALSO:

[Salesforce Help: Manage Multiple Currencies \(can be outdated or unavailable during release preview\)](#)

Peruvian Currency Format Updated

Starting with Summer '18, Salesforce supports the updated currency format for the Peruvian sol. The currency format has changed from 1.234,56 to 1,234.56.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Database.com, and Developer editions.

Retrieve Custom Setting List Views Using the Metadata API

Retrieve custom setting list views using the Metadata API so that when you retrieve packages, custom setting list views are included.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.



Tip: If you still use custom settings, consider checking out [custom metadata types](#). Custom metadata types are similar to custom settings. However, its records are metadata and not actual data. Use custom metadata types to save time during your development cycle.

Custom Buttons Used as Actions on Page Layouts Can No Longer Be Deleted

Because a page layout can be corrupted when you delete a custom button that was assigned as an action in the Salesforce Mobile and Lightning Experience Actions section, we now prevent the deletion.

Where: This change applies to Salesforce Classic and Lightning Experience and is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Contact Manager, and Developer editions.

AppExchange: New Filters and Profile Enhancements

Quickly identify the best solution for your business requirements with new filter options for clouds, features, and special credentials. We also made it easier to view and update your AppExchange profile.

IN THIS SECTION:

[Find AppExchange Solutions Faster with New Filters](#)

Looking for all the solutions available for Health Cloud? Curious if the solution you're considering is compatible with person accounts? We added more clouds and features to AppExchange's filters to help you find solutions faster. We also added filters for Pledge 1% membership and FedRAMP authorization to identify providers whose values and expertise align with your company's needs.

[Manage Your AppExchange Profile and Preferences](#)

You can now view and edit your AppExchange profile details when you try a solution, watch a demo, or request more information from a listing provider. We also made it easier to control your communication preferences about other products and services offered by the provider.

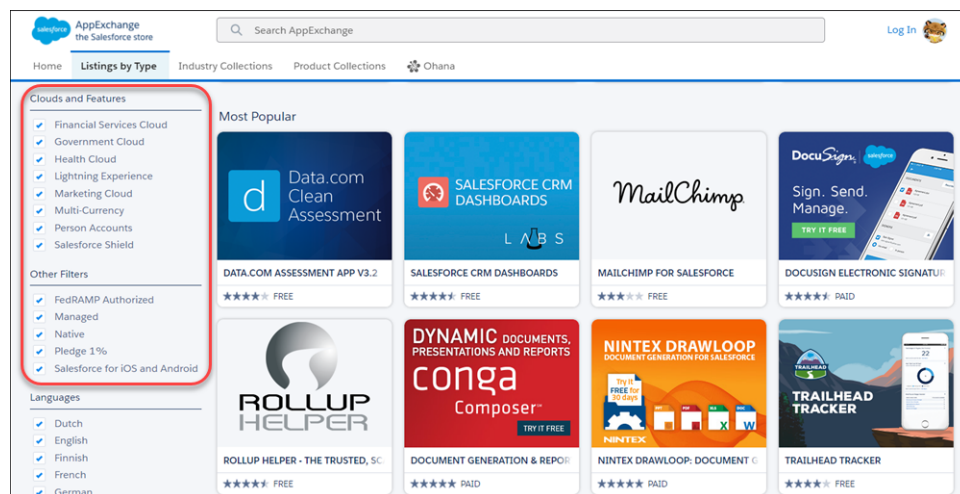
Find AppExchange Solutions Faster with New Filters

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Where: This change applies to the AppExchange website.

Why: New filters give you more flexibility when matching business requirements with AppExchange solutions. Now, you can filter to see:

- Solutions designed to work with Financial Services Cloud, Health Cloud, and Government Cloud.
- Solutions that support person accounts, multiple currencies, and Salesforce Shield.
- Providers who've pledged 1% of their equity, time, product, or profit to the community through the Pledge 1% program.
- Providers who are authorized by the Federal Risk and Authorization Management Program (FedRAMP).



Manage Your AppExchange Profile and Preferences

You can now view and edit your AppExchange profile details when you try a solution, watch a demo, or request more information from a listing provider. We also made it easier to control your communication preferences about other products and services offered by the provider.

Where: This change affects the AppExchange website.

How: When you log in to AppExchange and take a test drive, watch a demo, request more information, or click Get It Now, we display your profile (1). If anything is missing or out-of-date, you can make changes before submitting your information to the provider (2). You can also indicate whether you want information about other products and services offered by the provider (3).

You're almost ready for your test drive

Before we continue, the provider requests your contact information.

1 Here are the details we'll share from your profile **2** Edit Profile

* First Name Lincoln * Company Ursa Major Solar, Inc.

* Last Name Ulrich * Country USA

* Job Title Account Executive * State/Province New Mexico

* Email the.lincoln.ulrich@ [redacted]

Phone

I have read and agree to the [terms and conditions](#)

By sending this request, you agree to share your information with Salesforce and the provider of this listing. (Company Name).

Listing: (Listing Name)

3 I don't want the provider to contact me by email, phone, or SMS about other products or services I might like

Ask me about sharing my contact information every time I take a Test Drive or watch a demo ⓘ

You can update your preferences later in your [Salesforce community profile](#).

Cancel Submit

Security and Identity: New Verification and Login Methods, More Email and Field Encryption, Health Check Enhancements, and Easier My Domain Management

You can now control how long ID tokens and verification links are valid and let your customers log in using verification codes. Encrypt more fields, filter encrypted data, and take more control over your key material. Assess your Health Check score at a glance with a grade. Rename your subdomain without contacting Salesforce Customer Support.

IN THIS SECTION:

[Authentication and Identity: Enhanced Identity Verification Methods, Passwordless Login, and More Secure Community Sessions](#)

We added features to improve the user experience for your external identity communities. Give your customers the convenience of logging in with identity verification codes instead of passwords. Build dashboards for them to manage the phone numbers and email addresses that they use for verification. Set different community login policies to relax requirements for internal users. For access to a community or your org, control how long ID tokens and verification links are valid. Trigger custom app logic when users log out, for example, by revoking OAuth sessions. Also, your Auth. provider endpoints must start with http:// or https://.

[Salesforce Shield: Encrypt More Fields, Near-Real-Time Event Logs, and More Event Types and Fields](#)

Get near-real-time event data with hourly event logs, monitor long-running asynchronous callouts, and get more details about user activity in Lightning Experience. Encrypt a broader range of data in fields, use more features to access encrypted data, and opt out of key derivation with the Bring Your Own Key service.

[Security Health Check: Health Check Grades and New and Changed Settings](#)

You now see a grade next to your Health Check Score. We added and changed settings in Security Health Check.

[Other Security Changes: My Domain and Domain Management Improvements](#)

Rename your subdomain without contacting Salesforce Customer Support. And if you use an external service provider to serve your domain, you can point to their CNAME directly in Domain Management.

Authentication and Identity: Enhanced Identity Verification Methods, Passwordless Login, and More Secure Community Sessions

We added features to improve the user experience for your external identity communities. Give your customers the convenience of logging in with identity verification codes instead of passwords. Build dashboards for them to manage the phone numbers and email addresses that they use for verification. Set different community login policies to relax requirements for internal users. For access to a community or your org, control how long ID tokens and verification links are valid. Trigger custom app logic when users log out, for example, by revoking OAuth sessions. Also, your Auth. provider endpoints must start with `http://` or `https://`.

IN THIS SECTION:

[Make It Easy for Your External Users to Log In to Your Community with Passwordless Login](#)

Give your community members, customers, and other external users the convenience of logging in to your community with a verification code instead of a password. For example, have your external users log in with a code Salesforce sends in an email or text message. This feature is called passwordless login.

[Implement Passwordless Login and Verification Methods with Apex](#)

Create custom login pages to give users convenient access to your communities, for example, by entering a verification code sent to their email or phone. To implement the new verification methods and passwordless login pages, you use Apex and Visualforce to create custom login pages.

[Give Users Flexibility When Entering Phone Numbers](#)

Don't make users guess what format to use when entering phone numbers. Do country codes start with + signs? Does the nine-digit number require dashes? Give users some leeway on how they enter their phone number. Then use the `formatPhoneNumber` Apex method to convert the number to a phone number format required by Salesforce.

[Enable Users to Review and Manage Their Verification Methods](#)

Give users more control over the identity verification methods that they use to access your org. Use administrative tools to build custom registration screens and verification dashboards for internal and external users. Users can then review and manage their mobile phone numbers and email addresses that they use for verification.

[Set Different Login Policies for Salesforce and Community Users \(Beta\)](#)

If you set up a community in your org, you can specify different login policies for internal users when they log in to a community instead of the Salesforce app. For instance, don't enforce IP restrictions for internal users logging in to a community, but apply IP restrictions when they log in to the Salesforce app. By controlling access to the Salesforce app and communities separately, you can relax device activation and IP constraints for internal, trusted users to provide a better login experience.

[Track Logins for Internal Community Users](#)

The new Employee Login to Community login type enhances security and auditing by tracking when internal users log in to their communities. You can enable a device activation policy to require employees to verify their identity when logging in from a new browser or device. Then see who logged in by checking the login history for this login type.

[Set the Validity Period and Audiences for ID Tokens](#)

When you configure authentication settings for a connected app, you can specify for how long an ID token is valid after it's issued. You can also specify multiple audiences for the ID token.

[Subject Claim Added to Asset Token for OAuth 2.0 Asset Token Flow](#)

In the OAuth 2.0 asset token flow, the response from Salesforce now includes the subject claim (sub) in the asset token JWT payload. The subject claim identifies the 18-character, case-insensitive ID of the current user of the JWT. The sub claim is added to all new generated asset tokens.

[Set When Links Expire in Welcome Emails](#)

No more endless welcomes. Verification links with a shorter validity period provide greater security for your org. Configure welcome email links to expire after 1, 7 (the default), or 180 days. Previously, the default was six months. The default validity period also applies to welcome emails that you sent before Summer '18.

[Keep Links in Forgot Password Emails from Expiring Prematurely](#)

We've all forgotten a password and requested to reset it, right? Improve your users' experience, and let reset password links in forgot password emails stay active until a user confirms the password reset request. Sometimes email clients scan the email content and use the reset link to generate a preview. This action invalidates the link before the user clicks it. So previously, the links in forgot password emails expired immediately after the link was used.

[Administrator-Initiated Password Reset Links Expire After 24 Hours](#)

To improve authorization security, administrator-initiated password reset links in emails to internal and external users now expire after 24 hours. Previously, these links did not expire. This change also expires all password reset links in emails that you sent before Summer '18.

[Trailing Slash Removed from an ID Token's Issuer URL](#)

A trailing slash (/) is no longer added to the issuer URL for a community that does not have a root path prefix (/) in the ID token. This change conforms to the OpenID Connect Discovery standard and applies to all communities by default.

[Authentication Provider Endpoints Require HTTP or HTTPS](#)

Authentication provider endpoints must start with HTTP or HTTPS. Non-HTTP protocols, such as data://, feed://, or ftp://, are no longer supported for Auth. provider URLs.

[Register Callback URLs for OAuth 1.x](#)

When you set up authentication with OAuth 1.x, make sure that the callback URL that you register for the connected app matches your client app's callback URL. For example, use a value that identifies the app, such as https://MyCompany.MyApp. Salesforce validates that the connected app and client app use the same callback URL.

[Trigger Custom Application Logic When Users Log Out \(Beta\)](#)

To increase security, use Apex triggers to subscribe to logout events to run custom processes. For example, you can revoke all OAuth sessions for users when they log out of your org. Salesforce publishes logout events when the LogoutEventStream object is enabled. The LogoutEventStream object also has new fields: `SessionLevel` and `SourceIp`.

[Create Lightweight Contactless External Identity Users \(Beta\)](#)

Reduce the overhead of managing external identity users by creating users without contact information. You can add contacts later if you decide that you want them—like when you upgrade to a more full-featured community license. This feature, now in beta, has been enhanced since it was introduced as a pilot in the last release.

[Boost Customer Engagement by Extending Community Sessions for External Identity Users \(Beta\)](#)

Make it easy for your customers and partners to stay in your community with longer sessions and fewer logins. Allow users to remain logged in after they close their browser. And keep them logged in for up to seven days of inactivity. By default, community sessions for external identity users time out after 24 hours of inactivity. This feature hasn't changed since it was added in the last release and is still in beta.

[Renamed Option for Verifying Community External Users' Identity](#)

When external users access a Salesforce community from a new device or browser, you can require users to verify their identity as an extra measure of security. On an external user's profile, the option **Verify identity when external users access Salesforce from new browser or device (device activation)** has been renamed **Enable device activation**.

[View and Revoke Devices with Device Management \(Beta\)](#)

You can now see which devices are accessing your org and manage that access, all with an API or Apex call. If a user's device is lost or stolen, you can revoke access, which logs the device out of Salesforce.


Make It Easy for Your External Users to Log In to Your Community with Passwordless Login

Give your community members, customers, and other external users the convenience of logging in to your community with a verification code instead of a password. For example, have your external users log in with a code Salesforce sends in an email or text message. This feature is called passwordless login.

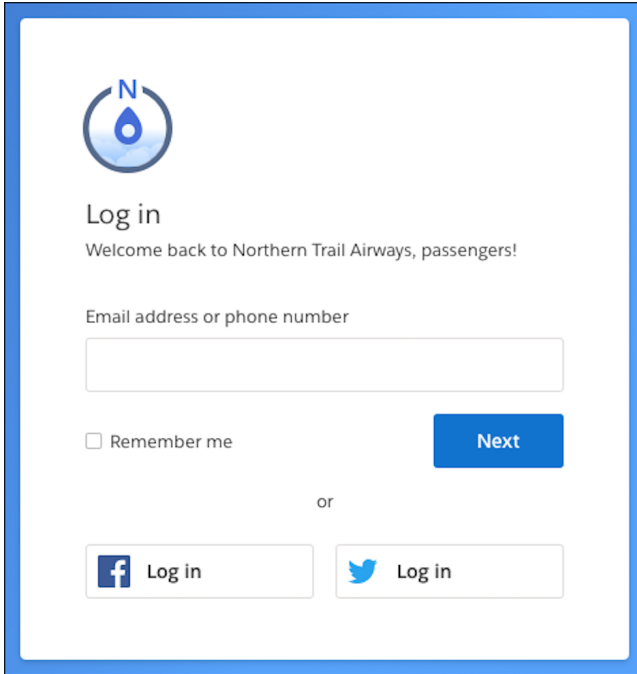
Where: This feature is available for Lightning communities and Salesforce Tabs + Visualforce accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available only for external users with the External Identity or any community license. Contact Salesforce Customer Support to use the SMS verification method (beta).

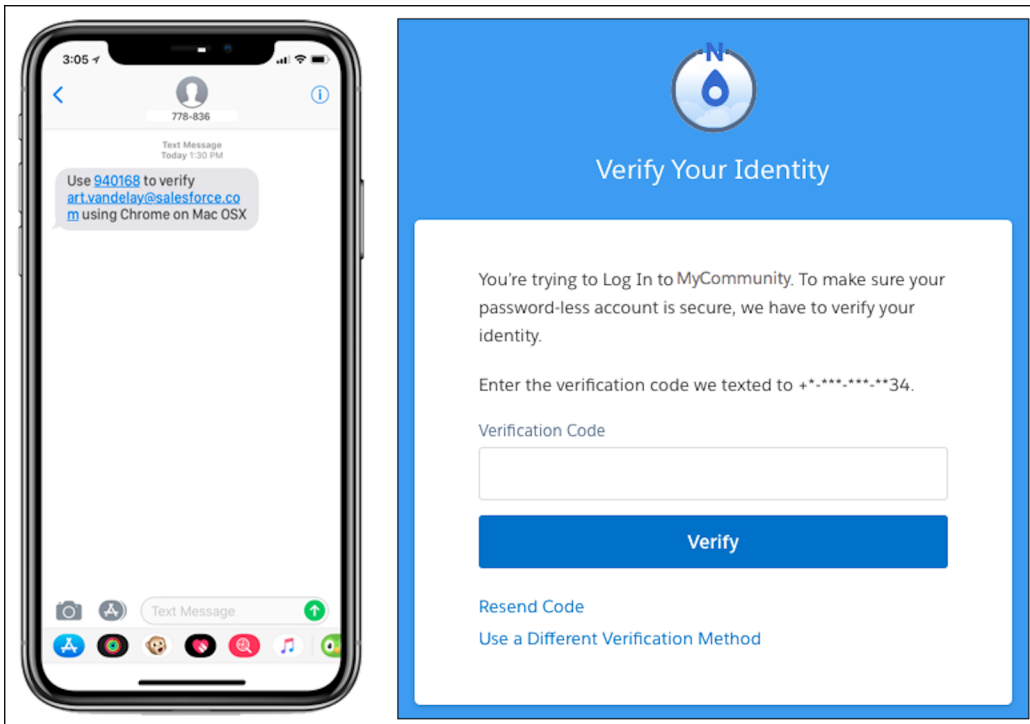
Why: Users are increasingly using their mobile devices to do their work. Some users, like retail customers and service reps, work solely on their mobile devices. Regardless of whether users are accessing a browser on their mobile device or desktop, remembering a password is inconvenient. Give your users the option to verify their identity another way. Instead of passwords, your external users can verify their identities with an email one-time password, Salesforce Authenticator, time-based one-time password (TOTP), or Universal 2nd Factor (U2F). Users can also verify their identities by text message (SMS), currently in beta.

 **Note:** SMS wasn't designed to support confidentiality of messages using encryption. In addition, an SMS verification code can be displayed on a locked device. As a result, an attacker could capture SMS content by intercepting text messages in transit or get access to a user's device. Generally, these attacks are specifically targeted and not as prone as password violations, but they can put your community at risk. When choosing your authentication technology, it's important to consider the data and business process that you want to protect, especially when deploying a single factor of authentication.


How: Here's a passwordless login scenario that uses an SMS text instead of a password. First, the custom login page prompts the user to sign in by entering either an email address or phone number.

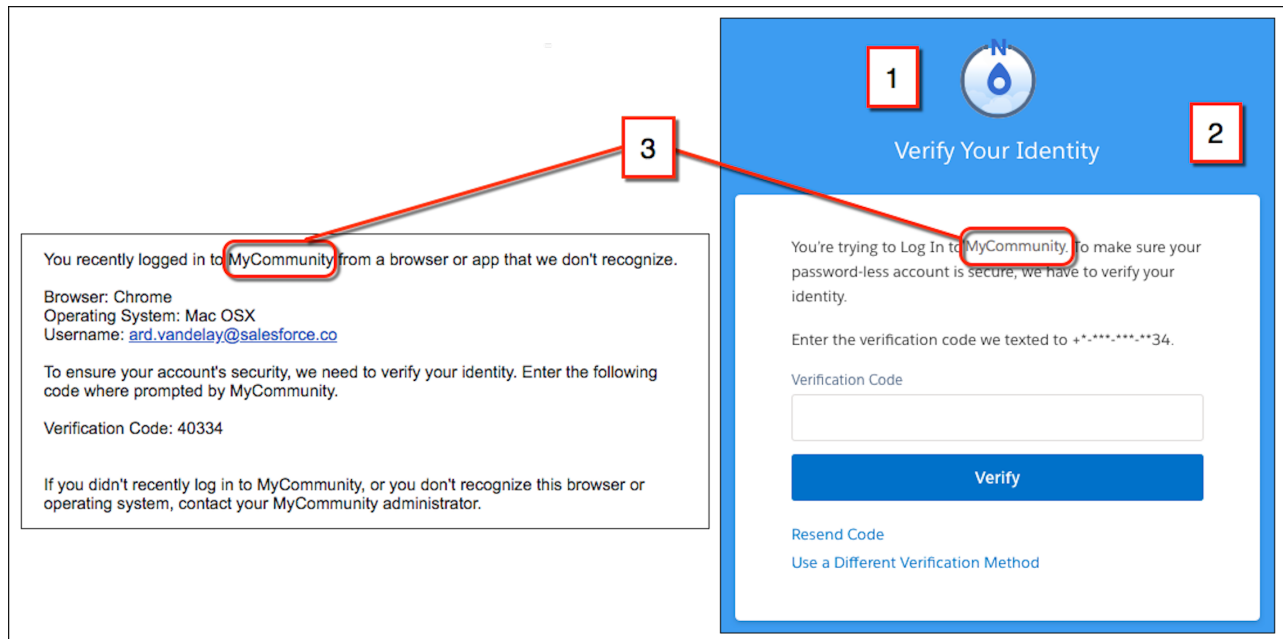



The user, who previously registered to receive verification codes by text, enters the phone number. The verification code is sent to the user's phone. After entering the verification code, the user is logged in to your community.



Salesforce takes care of the verification process. It generates the page that prompts the user to verify identity and the page containing the verification code. You can customize the user verification page by adding your logo (1) and changing the background color (2). Salesforce displays the name of your community in your verification messages (3).

 **Note:** As a security measure, when users add or update mobile numbers in Advanced User Details, they must log in again to verify their identity. As a result, unsaved changes in the app are lost. To disable this security measure, contact Salesforce Support.



 **Note:** This feature enables passwordless logins for external users. Meanwhile, our Lightning Login feature enables passwordless logins for internal users.

SEE ALSO:

[Salesforce External Identity Implementation Guide: Create a Passwordless Custom Login Page in Apex](#)

Implement Passwordless Login and Verification Methods with Apex

Create custom login pages to give users convenient access to your communities, for example, by entering a verification code sent to their email or phone. To implement the new verification methods and passwordless login pages, you use Apex and Visualforce to create custom login pages.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Use this feature with communities created for users with the External Identity or any community license.

How: Add Apex methods to register and deregister verification methods (1). Define the verification methods, and set the challenge order (2). Invoke the identity verification method, and log in the user upon successful verification (3).

```

System.UserManagement.registerVerificationMethod(Auth.VerificationMethod.TOTP, startUrl);
System.UserManagement.disconnectVerificationMethod(userId, Auth.VerificationMethod.TOTP);

// Add verification methods
public List<Auth.VerificationMethod> methods;

methods = new List<Auth.VerificationMethod>();
methods.add(Auth.VerificationMethod.SMS);
methods.add(Auth.VerificationMethod.U2F);
methods.add(Auth.VerificationMethod.SALESFORCE_AUTHENTICATOR);
methods.add(Auth.VerificationMethod.TOTP);
methods.add(Auth.VerificationMethod.EMAIL);

Site.passwordlessLogin(userId, methods, startURL);

```

When a user attempts to log in using a previously registered verification method, the user is sent a verification code. If the user enters the code correctly, the user is logged in to the community.

The Apex methods you use for identity verification and passwordless login include:

UserManagement.registerVerificationMethod

Registers an identity verification method, such as an email address or phone number.

UserManagement.deregisterVerificationMethod

Deregisters an existing identity verification method.

UserManagement.formatPhoneNumber

Formats a mobile phone number to ensure that it's formatted properly before updating it.

Site.passwordlessLogin

Logs in a user to a community using an identity verification method that the user previously registered.

For information about these methods, see the *Apex Developer Guide*.

SEE ALSO:

[Salesforce External Identity Implementation Guide: Create a Passwordless Custom Login Page in Apex](#)

Give Users Flexibility When Entering Phone Numbers

Don't make users guess what format to use when entering phone numbers. Do country codes start with + signs? Does the nine-digit number require dashes? Give users some leeway on how they enter their phone number. Then use the `formatPhoneNumber` Apex method to convert the number to a phone number format required by Salesforce.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Developers who use Apex to add business logic or customize the user interface programmatically.

Why: When you require users to enter phone numbers, such as for text verification, use `System.UserManagement.formatPhoneNumber` first to make sure that the mobile phone number is in the proper format. Then use the returned value from this method to update the user's `mobile` field. Updating the user record ensures that the mobile phone number is in the format required by Salesforce.

Here are some acceptable ways that users can enter their phone number:

- +1, (415) 555-1234 (with plus signs, parentheses, and dashes)
- 1,4155551234 (only numbers, no symbols)

- 1,415-555-1234 (extra spaces)

As long as the country code and phone number are separated, `System.UserManagement.formatPhoneNumber` returns a value in the proper format.

Here's the method signature:

```
System.UserManagement.formatPhoneNumber(countryCode, phoneNumber)
```

Now, consider the following examples.

- Correct examples:
 - `formatPhoneNumber('1', '4155551234');`
 - `formatPhoneNumber('+1', '(415) 555-1234');`
 - `formatPhoneNumber('1', '415-555-1234');`
- Incorrect example, because the country code and phone number aren't separated:
 - `formatPhoneNumber(null, '+1 415-555-1234');`
- Example that doesn't generate an error, but likely won't work as intended:
 - `formatPhoneNumber('+1', '+1 (415) 555-1234');`

Enable Users to Review and Manage Their Verification Methods

Give users more control over the identity verification methods that they use to access your org. Use administrative tools to build custom registration screens and verification dashboards for internal and external users. Users can then review and manage their mobile phone numbers and email addresses that they use for verification.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

How: In addition to building your own dashboards and tools, the Two-Factor Authentication Dashboard app on App Exchange offers the following features.

- See who is registered with the various identity verification methods. Perform administrative tasks, such as disconnect registrations and generate temporary two-factor authentication codes.
- Use dashboards and reports to monitor registration progress and audit verification activities within your org.
- Create a two-factor authentication campaign by integrating the Two-Factor Authentication Registration email template with the Mass User Email tool.

To support customer interfaces, we added the User Verified Mobile Number and User Verified Email fields. Under Identity Verification Methods, you see if users have registered and verified a mobile phone number, an email address, or both.

Also, the following fields were renamed.

- Has Verified Mobile Number is now Admin Trusted Mobile Number.
- Has One-Time Password App is now One-Time Password App.
- Has Salesforce Authenticator is now Salesforce Authenticator.
- Has Temporary Code is now Temporary Code.
- Has U2F Security Key is now U2F Security Key.

Identity Verification Methods

Report Generation Status: Complete

Report Options:

Summarize information by: --None--

Run Report Hide Details Customize Save As Printable View Export Details

Username	Admin Trusted Mobile Number	User Verified Mobile Number	User Verified Email	One-Time Password App	Salesforce Authenticator	Temporary Code	U2F Security Key
@.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
@.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
@	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


SEE ALSO:

[See How Your Users Are Verifying Their Identity](#)


Set Different Login Policies for Salesforce and Community Users (Beta)

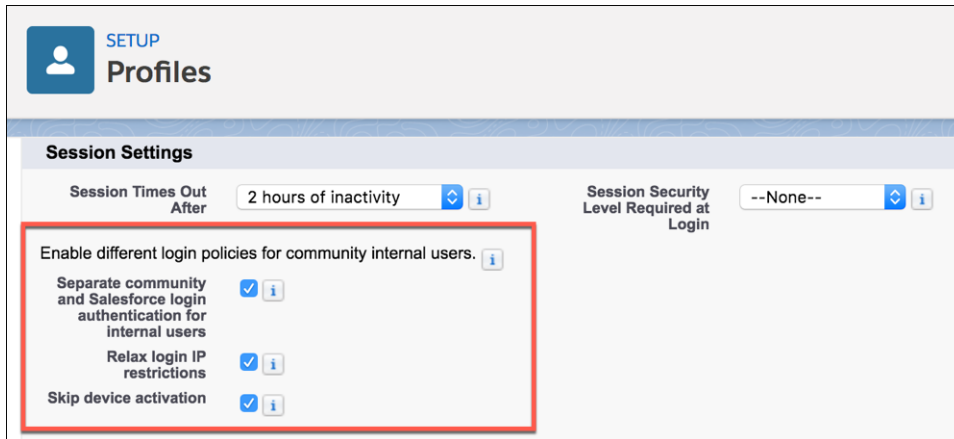
If you set up a community in your org, you can specify different login policies for internal users when they log in to a community instead of the Salesforce app. For instance, don't enforce IP restrictions for internal users logging in to a community, but apply IP restrictions when they log in to the Salesforce app. By controlling access to the Salesforce app and communities separately, you can relax device activation and IP constraints for internal, trusted users to provide a better login experience.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Separate Login Policies for Salesforce and Community Users is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Separate Login Policies for Salesforce and Community Users in the [Salesforce Identity group in the Trailblazer Community](#).

How: In Setup, in the Quick Find box, enter *Profiles*, and then edit an internal user's profile. Under Session Settings, select **Separate community and Salesforce login authentication for internal users**. To set less restrictive login policies, select **Relax login IP restrictions** or **Skip device activation**, or both.

 **Note:** For internal users who have these options defined in their profile, authentication with OAuth is not supported on community domains. Also, when internal users who have these options enabled navigate to community workspaces, they are prompted to log in to the community again. Users who have these options enabled and the required permissions can still create communities.



SEE ALSO:

[View and Edit Session Settings in Profiles](#)

Track Logins for Internal Community Users

The new Employee Login to Community login type enhances security and auditing by tracking when internal users log in to their communities. You can enable a device activation policy to require employees to verify their identity when logging in from a new browser or device. Then see who logged in by checking the login history for this login type.

Where: This feature is available for Lightning communities and Salesforce Tabs + Visualforce accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: This feature is available only to users with the External Identity or any community license. This change also applies to legacy portal licenses.

How: Look for the Employee Login to Community login type in your login history. From Setup, enter *Login History*, then select **Login History**.

Set the Validity Period and Audiences for ID Tokens

When you configure authentication settings for a connected app, you can specify for how long an ID token is valid after it's issued. You can also specify multiple audiences for the ID token.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

This change applies to applications using the OpenID Connect protocol for authentication.

When: This functionality is available on a rolling basis during the Summer '18 release. The new settings become available after all instances are on the Summer '18 release, because the data is stored in the replicated consumer table.

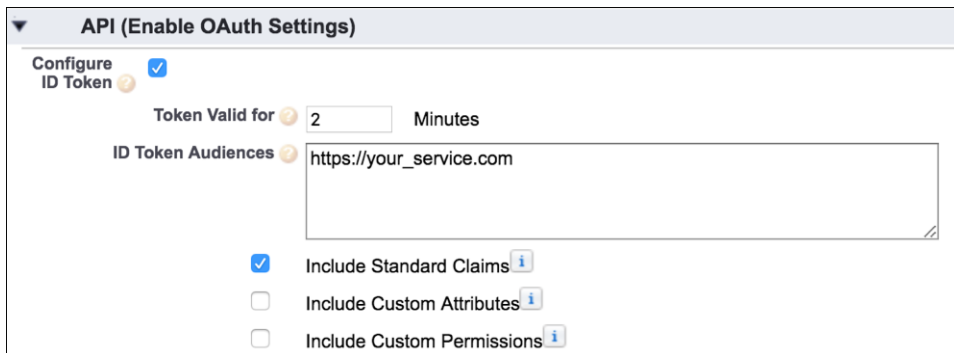
How: Configure the validity period and audiences of an ID token when you enable OAuth settings for a connected app. After you select **Configure ID Token**, configure the secondary settings that control the ID token contents in the access token and refresh token responses. Specify the following new settings.

Token Valid for

The length of time that the ID token is valid after it's issued. The period can be from 1 to 720 minutes. The default is 2 minutes.

ID Token Audiences

The intended consumers of the ID token. For example, the target service where you use the ID token, such as `https://your_service.com`.



The screenshot shows the 'API (Enable OAuth Settings)' configuration page. The 'Configure ID Token' section is checked. The 'Token Valid for' is set to 2 minutes. The 'ID Token Audiences' field contains the URL `https://your_service.com`. Below this, there are three checkboxes: 'Include Standard Claims' (checked), 'Include Custom Attributes' (unchecked), and 'Include Custom Permissions' (unchecked). Each checkbox has an information icon to its right.

SEE ALSO:

[Create a Connected App](#)

Subject Claim Added to Asset Token for OAuth 2.0 Asset Token Flow

In the OAuth 2.0 asset token flow, the response from Salesforce now includes the subject claim (sub) in the asset token JWT payload. The subject claim identifies the 18-character, case-insensitive ID of the current user of the JWT. The sub claim is added to all new generated asset tokens.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

SEE ALSO:

[OAuth 2.0 Asset Token Flow](#)

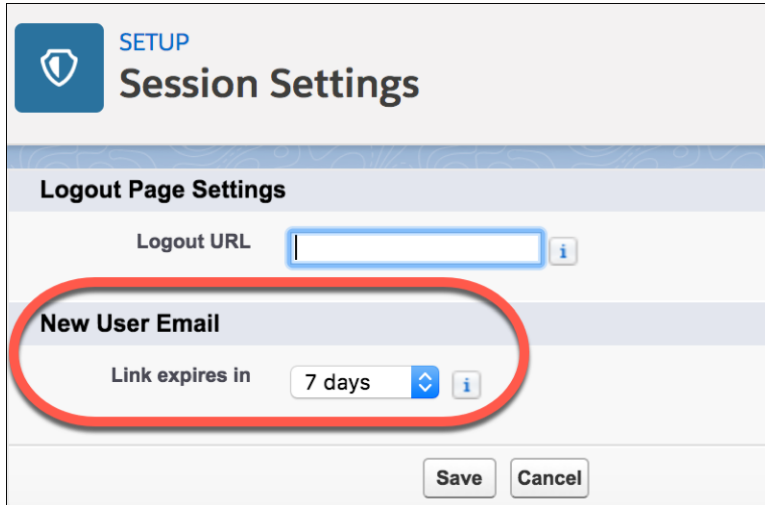
Set When Links Expire in Welcome Emails

No more endless welcomes. Verification links with a shorter validity period provide greater security for your org. Configure welcome email links to expire after 1, 7 (the default), or 180 days. Previously, the default was six months. The default validity period also applies to welcome emails that you sent before Summer '18.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Who: To modify session security settings, you need the Customize Application user permission.

How: On the Session Settings page in the New User Email section, set **Link expires in** to control for how long verification links in welcome emails are valid. When you update this setting, the change applies to links in welcome emails that were already sent. For example, you added a user and sent a welcome email two days ago when links expired in seven days. If you update the setting so that links expire in one day, the link in the email you sent two days ago is no longer valid.



The screenshot shows the Salesforce Setup interface for Session Settings. The page title is "Session Settings" under the "SETUP" header. There are two main sections: "Logout Page Settings" and "New User Email". The "Logout Page Settings" section has a "Logout URL" field with an information icon. The "New User Email" section has a "Link expires in" dropdown menu set to "7 days" and an information icon. At the bottom, there are "Save" and "Cancel" buttons.

SEE ALSO:

[Modify Session Security Settings](#)

[Expire Community Links in Welcome Emails](#)

Keep Links in Forgot Password Emails from Expiring Prematurely

We've all forgotten a password and requested to reset it, right? Improve your users' experience, and let reset password links in forgot password emails stay active until a user confirms the password reset request. Sometimes email clients scan the email content and use the reset link to generate a preview. This action invalidates the link before the user clicks it. So previously, the links in forgot password emails expired immediately after the link was used.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

How: To require user action before expiring a link in a forgot password email, on the Profiles page in the Password Policies section, select **Don't immediately expire links in forgot password emails**.

When a user clicks the link in a forgot password email, a web page opens where the user confirms the password reset request. The link in the email expires only after the user confirms the request. A user still has 24 hours to reset a forgotten password. Otherwise, the user must submit another request, for example, by going to <https://login.salesforce.com/secur/forgotpassword.jsp>.

SETUP Profiles

Password Policies

User passwords expire in	Never expires
Enforce password history	No passwords remembered
Minimum password length	5
Password complexity requirement	Must mix alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input checked="" type="checkbox"/>

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Here's the reset password confirmation page.

salesforce

Reset your password?

Let's get you set up with a new password.

[Reset Password](#)

SEE ALSO:

- [View and Edit Password Policies in Profiles](#)
- [Password Policy Fields in Profiles](#)

Administrator-Initiated Password Reset Links Expire After 24 Hours

To improve authorization security, administrator-initiated password reset links in emails to internal and external users now expire after 24 hours. Previously, these links did not expire. This change also expires all password reset links in emails that you sent before Summer '18.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

When: This functionality is available on a rolling basis during the Summer '18 release.

Trailing Slash Removed from an ID Token's Issuer URL

A trailing slash (/) is no longer added to the issuer URL for a community that does not have a root path prefix (/) in the ID token. This change conforms to the OpenID Connect Discovery standard and applies to all communities by default.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

How: These examples show an issuer URL with and without a trailing slash (/).

- Issuer URL before this change:
`https://mycommunity.force.com/`
- Issuer URL after this change:
`https://mycommunity.force.com`

Authentication Provider Endpoints Require HTTP or HTTPS

Authentication provider endpoints must start with HTTP or HTTPS. Non-HTTP protocols, such as `data://`, `feed://`, or `ftp://`, are no longer supported for Auth. provider URLs.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: To edit authentication provider settings, you need the Customize Application and Manage Auth. Provider user permissions.

Register Callback URLs for OAuth 1.x

When you set up authentication with OAuth 1.x, make sure that the callback URL that you register for the connected app matches your client app's callback URL. For example, use a value that identifies the app, such as `https://MyCompany.MyApp`. Salesforce validates that the connected app and client app use the same callback URL.

Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Trigger Custom Application Logic When Users Log Out (Beta)

To increase security, use Apex triggers to subscribe to logout events to run custom processes. For example, you can revoke all OAuth sessions for users when they log out of your org. Salesforce publishes logout events when the LogoutEventStream object is enabled. The LogoutEventStream object also has new fields: `SessionLevel` and `SourceIp`.

Where: This change is available in Lightning Experience and Salesforce Classic in all editions.

- 📌 **Note:** As a beta feature, the LogoutEventStream object is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only based on generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions,

Salesforce reservation of rights, obligations concerning the Services, and terms for related non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the LogoutEventStream object in the [Salesforce Identity group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.


How: The LogoutEventStream object records successful user logouts only from the UI. The `SourceIp` field provides the source IP address of the client logging out.

The `SessionLevel` field indicates the session-level security of the session that the user is logging out of. Session-level security controls user access to features that support it, such as connected apps and reporting. Possible values are LOW, STANDARD, and HIGH_ASSURANCE.

Create Lightweight Contactless External Identity Users (Beta)

Reduce the overhead of managing external identity users by creating users without contact information. You can add contacts later if you decide that you want them—like when you upgrade to a more full-featured community license. This feature, now in beta, has been enhanced since it was introduced as a pilot in the last release.

Where: This feature is available in Lightning Experience and Salesforce Classic and in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** This release contains a beta version of Contactless Users for External Identity Users, which means it's a high-quality feature with known limitations. Contactless Users for External Identity Users 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 based on generally available products and features.

Who: This feature is available only to users with the External Identity license, which applies to users with the Identity for Customers and Partners product. This feature is not available with any other community licenses. Contact Salesforce Customer Support to enable this feature.

Why: Typically, when Salesforce creates an external identity user, it adds a contact. But if your implementation doesn't require contact information for external users, consider going contactless. Without contacts, you don't have to worry about keeping user and contact records in sync. You can simply maintain a user database for identity purposes. For example, you can delay creating contacts for those who register for your community until after they're qualified.

How: You create a contactless external identity user programmatically with the Salesforce SOAP API User object.

```
User u = new User();
u.FirstName = 'James';
u.LastName = 'James';
u.Email = 'jjames@test.com';
u.Alias = 'James';
u.Username = 'jjames@test.com';
u.CommunityNickname = 'James';
u.LocaleSidKey = 'en_US';
u.TimeZoneSidKey = 'GMT';
u.ProfileID = '00exx000000jvN4'; // Profile that's associated with the EI license
u.LanguageLocaleKey = 'en_US';
u.EmailEncodingKey = 'UTF-8';
insert u;
```

To add a contact to the contactless external identity user, create a contact (1), and associate the contact with the user (2).

```

Account a = (SELECT Id FROM Account WHERE Id = '001xx000003DIyf');
Contact c = new Contact(); // Create contact 1
c.FirstName = 'James';
c.LastName = 'James';
c.AccountId = a.id;
insert c;
User u = (SELECT Id FROM User WHERE Id = '005xx000001TLL1f');
u.ContactId=c.id // Associate contact with user 2
update u;


```

To upgrade an external identity to a community license, make sure that the external identity has a contact. Then follow the instructions in Salesforce Help to upgrade to a community user license.

Boost Customer Engagement by Extending Community Sessions for External Identity Users (Beta)

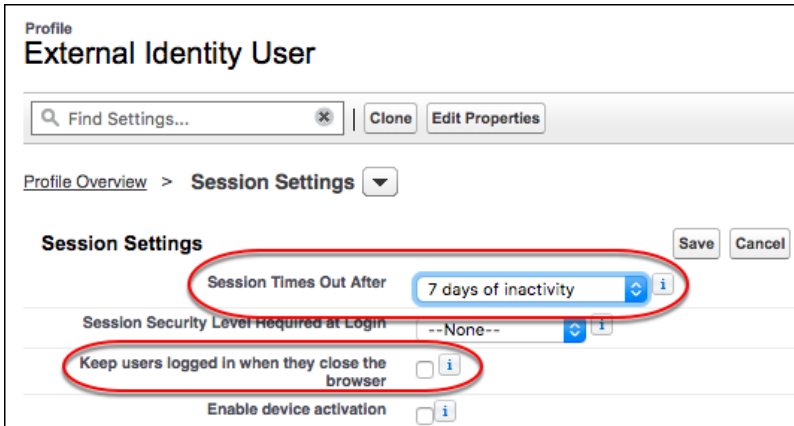
Make it easy for your customers and partners to stay in your community with longer sessions and fewer logins. Allow users to remain logged in after they close their browser. And keep them logged in for up to seven days of inactivity. By default, community sessions for external identity users time out after 24 hours of inactivity. This feature hasn't changed since it was added in the last release and is still in beta.

Where: This feature is available in Lightning Experience, Salesforce Classic, and in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** This release contains a beta version of Extended Sessions for External Identity Users, 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.

Who: This feature is available only to users with the External Identity license, which applies to users with the Identity for Customers and Partners product. This feature is not available with any other community licenses. Contact Salesforce Customer Support to enable this feature.

How: Modify the external identity session settings for the External Identity profile. Find these settings under the profile's session settings. Choose a timeout value from the **Sessions Times Out After** dropdown. If you select **Keep users logged in when they close the browser**, inform your users that they must log out to end their session.



Profile
External Identity User

Find Settings... | Clone Edit Properties

Profile Overview > Session Settings

Session Settings Save Cancel

Session Times Out After 7 days of inactivity ⓘ

Session Security Level Required at Login --None-- ⓘ

Keep users logged in when they close the browser ⓘ

Enable device activation ⓘ

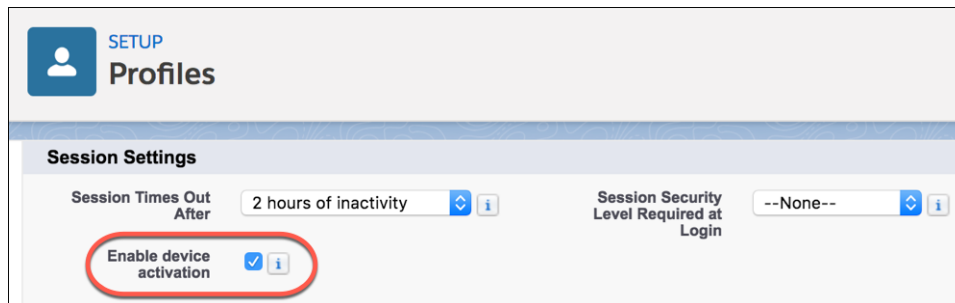
Renamed Option for Verifying Community External Users' Identity

When external users access a Salesforce community from a new device or browser, you can require users to verify their identity as an extra measure of security. On an external user's profile, the option **Verify identity when external users access Salesforce from new browser or device (device activation)** has been renamed **Enable device activation**.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: External users are users with Customer Community, Customer Community Plus, Partner Community, or External Identity licenses. This change also applies to legacy portal licenses.

How: In Setup, in the Quick Find box, enter *Profiles*, and then edit an external user's profile. Under Session Settings, select **Enable device activation** and save the profile.



SEE ALSO:

[View and Edit Session Settings in Profiles](#)

View and Revoke Devices with Device Management (Beta)

You can now see which devices are accessing your org and manage that access, all with an API or Apex call. If a user's device is lost or stolen, you can revoke access, which logs the device out of Salesforce.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Note: As a beta feature, Device Management is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

Who: To view devices that access Salesforce, you must have the View Devices permission enabled. To revoke device access, you must have the Manage Devices permission enabled.

Salesforce Shield: Encrypt More Fields, Near-Real-Time Event Logs, and More Event Types and Fields

Get near-real-time event data with hourly event logs, monitor long-running asynchronous callouts, and get more details about user activity in Lightning Experience. Encrypt a broader range of data in fields, use more features to access encrypted data, and opt out of key derivation with the Bring Your Own Key service.

IN THIS SECTION:

[Shield Platform Encryption: Activities Data, Custom Object Name, Filter-Preserving Encryption, and More Key Management Options](#)

Shield Platform Encryption customers can encrypt a broader range of data and use more features to access encrypted data. We offer compatibility with List Emails, Field Service Lightning, and Einstein Analytics. Encrypt your activities, emails, rich text area fields (pilot), and custom object name fields (beta). You can find exact and fuzzy matches with custom and standard matching rules (beta), and require high-assurance sessions for key management tasks. And choose whether to opt in to our filter-friendly encryption scheme or opt out of key derivation.

[Event Monitoring: Hourly Event Logs, Continuation Callout Summary Event Type, and More Data in Lightning Event Types](#)

Hourly event logs are now generally available to help you review org activity in near real time. A new event type helps you monitor long-running asynchronous callouts, and new Lightning event fields provide more detail about user activity in Lightning.

Shield Platform Encryption: Activities Data, Custom Object Name, Filter-Preserving Encryption, and More Key Management Options

Shield Platform Encryption customers can encrypt a broader range of data and use more features to access encrypted data. We offer compatibility with List Emails, Field Service Lightning, and Einstein Analytics. Encrypt your activities, emails, rich text area fields (pilot), and custom object name fields (beta). You can find exact and fuzzy matches with custom and standard matching rules (beta), and require high-assurance sessions for key management tasks. And choose whether to opt in to our filter-friendly encryption scheme or opt out of key derivation.

IN THIS SECTION:

[Encrypt Your List Emails](#)

Extend your security policies to sensitive information included in list emails. Shield Platform Encryption is now available for certain list email fields, giving sensitive information in your marketing campaigns an extra layer of protection.

[Encrypt Fields on Work Orders and Service Appointments](#)

Shield Platform Encryption is now available for Field Service Lightning data, giving you can another layer of security to the data that your field employees and partners gather and access.

[Encrypt Fields for Your Activities \(Generally Available\)](#)

Encrypt task comments and event descriptions, adding an extra layer of protection to your workflow.

[Encrypt Custom Object Names \(Beta\)](#)

Add an extra layer of protection to the data in your custom objects. Encryption for custom object name fields supports both deterministic and probabilistic encryption schemes.

[Encrypt Your Email to Case Feed and Email Messages \(Beta\)](#)

Emails and time management tools play an important role in your day-to-day workflow. For another layer of security and compliance controls, you can now encrypt Email and Email to Case messages. You control the life cycle of the keys used to encrypt your emails, helping you meet your compliance and regulatory obligations.

[Encrypt Data in Rich Text Area Fields \(Pilot\)](#)

Shield Platform Encryption now offers encryption for rich text area fields, adding a layer of security to a wider range of your data. You can encrypt rich text area fields in custom and standard objects.

[Get Exact, Case-Sensitive Matching with Shield Filter-Preserving Encryption \(Generally Available\)](#)

With the deterministic encryption scheme, you can add an extra layer of security to your data without giving up the ability to filter and execute unicity-related services. You can apply deterministic encryption on a field-by-field basis, giving you granular control over your data's security and functionality.

[Enable Encryption for Einstein Analytics Data \(Generally Available\)](#)

Slice and dice your data with peace of mind using Einstein Analytics Encryption. Now you can now add an extra layer of security to your Einstein Analytics datasets.

[Reference Encrypted Fields in Matching Rules Used in Duplicate Management \(Beta\)](#)

Shield Platform Encryption now supports fuzzy matches and compatibility with duplicate jobs to help you maintain a broader range of your data. In addition to custom matching rules, you can also reference encrypted fields with standard matching rules.

[Use Shield Platform Encryption with Change Data Capture \(Pilot\)](#)

Change Data Capture pilot provides near-real-time changes of Salesforce records and synchronizes corresponding records in an external data store. You can use Change Data Capture when Shield Platform Encryption is enabled. If a Salesforce record field is encrypted, changes to encrypted field values generate change events. Data in change event messages is delivered over a secure transport layer (HTTPS and TLS).

[Require High-Assurance Sessions for Key Management Tasks \(Generally Available\)](#)

Two-factor authentication is a powerful tool for keeping access to data and resources secure. You can now require two-factor authentication for key management tasks like generating, rotating, or uploading keys and certificates. When administrators try to manage encryption key, they must use a second form of authentication such as the Salesforce Authenticator app or a U2F security key. Breathe easy knowing that the security administrator handling your encryption key material is actually the person you hired (and trust) to do the job.

[Opt Out of Key Derivation with BYOK \(Generally Available\)](#)

Shield Platform Encryption's Bring Your Own Key (BYOK) service gives you more control of your uploaded key material. You can now opt out of key derivation on a key-by-key basis through the UI and API. When you opt out, you're in full control of your keys and have access to all key rotation features offered by the Shield Platform Encryption service. Because you can opt out on a key-by-key basis, you can still use the default BYOK service at any time. The default service combines your uploaded key material with our master secret to derive a unique data encryption key. When you opt out, you can upload a complete data encryption key that the Shield Key Management Service uses to encrypt and decrypt your data.

Encrypt Your List Emails

Extend your security policies to sensitive information included in list emails. Shield Platform Encryption is now available for certain list email fields, giving sensitive information in your marketing campaigns an extra layer of protection.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: You can encrypt these fields in list emails:

- From Name
- From Address
- Reply To Address fields

You can also encrypt the Email field in list email sent results. Only the From Name field supports deterministic encryption.

How: To encrypt these fields, add them to your Encryption Policy from Setup.

SEE ALSO:

[Keep List Email Under Lock and Key](#)

Encrypt Fields on Work Orders and Service Appointments

Shield Platform Encryption is now available for Field Service Lightning data, giving you can another layer of security to the data that your field employees and partners gather and access.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: The Field Service Lightning license is required to encrypt fields on the Service Appointments object.

Why: You can encrypt these fields on work orders, work order line items, and service appointments.

- Address (Street and City only)
- Description
- Subject

The deterministic encryption scheme is available for service appointment and work order Address and Subject fields, and work order line item Address and Subject fields.

How: To encrypt these fields, add them to your Encryption Policy from Setup.

SEE ALSO:

[Encrypt Data at Rest with Shield for Work Orders and Service Appointments](#)

Encrypt Fields for Your Activities (Generally Available)

Encrypt task comments and event descriptions, adding an extra layer of protection to your workflow.


Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: From the Encryption Policy page in Setup, select **Activity Description**. When you encrypt the Activity Description field, the Task Comments field is also encrypted.

Encrypt Custom Object Names (Beta)

Add an extra layer of protection to the data in your custom objects. Encryption for custom object name fields supports both deterministic and probabilistic encryption schemes.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Shield Platform Encryption for Custom Object Name is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only. It's offered as is, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Shield Platform Encryption for Custom Object Name in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Who: To enable encryption on custom object name fields, contact Salesforce. Administrators need the Customize Application permission.


How: In Lightning Experience, find the object in the Object Manager, and select **Fields & Relationships**. Select **Edit** from the field menu, and then select **Encrypt the contents of this field**.

In Salesforce Classic, navigate to the object in Setup, and select **Standard Fields**. Select **Edit** next to the custom object's name. Then select **Encrypt the contents of this field**, and click **Save**.

Encrypt Your Email to Case Feed and Email Messages (Beta)

Emails and time management tools play an important role in your day-to-day workflow. For another layer of security and compliance controls, you can now encrypt Email and Email to Case messages. You control the life cycle of the keys used to encrypt your emails, helping you meet your compliance and regulatory obligations.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Shield Platform Encryption for Email to Case and Email Messages is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only. It's offered as is, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Shield Platform Encryption for Email to Case and Email Messages in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Why: You can encrypt these data elements in the email message.

- From Name
- From Address
- To Address
- CC Address
- BCC Address
- Subject
- Text Body
- HTML Body
- Headers


You can also encrypt the Relation Address field on the Email Message Relation object.

How: To enable encryption for Email to Case and Email Messages, contact Salesforce. Then apply encryption to these fields on the Encryption Policy page in Setup. You can apply probabilistic or deterministic encryption to these fields.

Encrypt Data in Rich Text Area Fields (Pilot)

Shield Platform Encryption now offers encryption for rich text area fields, adding a layer of security to a wider range of your data. You can encrypt rich text area fields in custom and standard objects.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** We provide Shield Platform Encryption for Rich Text Area Fields to selected customers through a pilot program that requires agreement to specific terms and conditions. Shield Platform Encryption for Rich Text Area Fields 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.


Who: To join the Shield Platform Encryption for Rich Text Area Fields pilot, contact your account executive or Salesforce Customer Support. To enable encryption on rich text area fields, administrators need the Customize Application permission.

How: You can enable encryption when you create or edit a rich text area field.

In Lightning Experience, from the Object Manager, select your custom or standard object, and then select **Fields & Relationships**. When you create or edit a rich text area field, select **Encrypted** on the field detail page.

In Salesforce Classic, navigate to your object in Setup, and select **Fields**. Under the Custom Fields and Relationships section, click **New**, and select **Encrypted** on the field detail page.

All new data entered in the rich text area field is encrypted. To encrypt existing data, contact Salesforce to request the background encryption service.

 **Note:** Links in rich text area fields are encrypted. To encrypt images in rich text area fields, select **Encrypt Files and Attachments** from the Encryption Policy page in Setup.

Get Exact, Case-Sensitive Matching with Shield Filter-Preserving Encryption (Generally Available)

With the deterministic encryption scheme, you can add an extra layer of security to your data without giving up the ability to filter and execute unicity-related services. You can apply deterministic encryption on a field-by-field basis, giving you granular control over your data's security and functionality.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To use deterministic encryption, you must have the Customize Application and View Setup and Configuration permissions.

Why: The filter-preserving deterministic encryption scheme supports exact-match, case-sensitive comparisons in the following cases.

- Exact matching when filtering
- Case-sensitive comparisons of encrypted values in
 - Reports
 - Dashboards
 - List Views
 - SOQL and WHERE queries
 - External ID
 - Unique settings on custom fields
 - Custom indexes on standard and custom fields
 - Two-column indexes

Case-sensitive means that a SOQL query against the Lead object for which Company = 'Acme' returns only "Acme," and not "acme" or "ACME." Similarly, when the filter-preserving scheme tests for unicity (uniqueness), each version of Acme would be unique. Compound Name and Address fields aren't supported. For example, you can't concatenate FirstName and LastName in a single filter on Name. Instead, query FirstName and LastName using AND.

```
SELECT Id FROM Contact WHERE FirstName = 'William' AND LastName = 'Spock'
```

How: Before you enable deterministic encryption, make sure that you've already generated or uploaded an encryption key. Then enable Deterministic Encryption on the Advanced Settings page. Generate or upload key material specifically for the data you encrypt deterministically. You can mix and match deterministic and probabilistic encryption schemes on standard and custom fields.

Contact Salesforce Support to encrypt your existing data with the active Data in Salesforce (Deterministic) key material. If you change the encryption scheme for a field from Deterministic to Probabilistic, contact Salesforce to re-encrypt data in that field with your active Data in Salesforce key material.

SEE ALSO:

[Salesforce Help: Filter Encrypted Data with Deterministic Encryption \(can be outdated or unavailable during release preview\)](#)

Enable Encryption for Einstein Analytics Data (Generally Available)

Slice and dice your data with peace of mind using Einstein Analytics Encryption. Now you can now add an extra layer of security to your Einstein Analytics datasets.

Where: This change applies to Salesforce Classic, Lightning Experience, and all version of the mobile app in enterprise, performance, unlimited, and developer editions.

Who: Einstein Analytics Encryption requires both Shield Platform Encryption and Einstein Analytics Platform licenses. Requires the Manage Encryption Keys permission.

Why: Einstein Analytics Encryption services are built natively into the Einstein Analytics platform, giving your data an extra layer of security. Einstein Analytics Encryption encrypts data at rest with probabilistic encryption that follows the Advanced Encryption Standard (AES), with 256-bit keys using CTR mode for every write. All operations, including sort and group-by, work the same as without encryption.

How: You can enable Einstein Analytics Encryption from the Platform Encryption pages in Setup. First generate an Analytics-type tenant secret on the Key Management page. Then check the **Encrypt Einstein Analytics** box on the Encryption Policy page.

SEE ALSO:


[Salesforce Help: Einstein Analytics Encryption \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Encrypt Einstein Analytics Data \(can be outdated or unavailable during release preview\)](#)

Reference Encrypted Fields in Matching Rules Used in Duplicate Management (Beta)

Shield Platform Encryption now supports fuzzy matches and compatibility with duplicate jobs to help you maintain a broader range of your data. In addition to custom matching rules, you can also reference encrypted fields with standard matching rules.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.


 **Note:** As a beta feature, Shield Platform Encryption for Matching Rules is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only. It's offered as is, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Shield Platform Encryption for Matching Rules in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Why: Use encryption for matching rules to keep your data clean and uncluttered by returning case-insensitive (fuzzy) and case-sensitive (exact) matches on encrypted data. For example, if you encrypted the Name field and referenced it in a matching rule, the rule can identify "Kate" and "kate" as matches, as well as "Kate" and "Katherine." Encryption for matching rules used in duplicate management doesn't support probabilistically encrypted data.

How: To add encryption to fields referenced in custom matching rules, activate deterministic encryption on the Platform Encryption Advanced Settings page. Then contact Salesforce to enable encryption compatibility with duplicate management.

You must temporarily deactivate your existing custom rules that reference the fields that you want to encrypt. If you don't deactivate the rules, you can't save your encryption settings. On the Encryption Policy page, select the fields to encrypt, apply deterministic encryption to those fields, and save. Then reactivate your custom rules.

Standard matching rules are automatically deactivated when encryption is added to a field referenced by that rule. After you get the email verifying that encryption is enabled, reenable the rules that reference that field.

 **Important:** To ensure accurate matching results, existing beta customers must deactivate all matching rules that reference encrypted fields and then reactivate them. If your custom matching rule fails on reactivation, contact Salesforce for help reactivating your match index.


SEE ALSO:

[Salesforce Help: Apply Encryption to Fields Used in Matching Rules \(can be outdated or unavailable during release preview\)](#)

Use Shield Platform Encryption with Change Data Capture (Pilot)

Change Data Capture pilot provides near-real-time changes of Salesforce records and synchronizes corresponding records in an external data store. You can use Change Data Capture when Shield Platform Encryption is enabled. If a Salesforce record field is encrypted, changes to encrypted field values generate change events. Data in change event messages is delivered over a secure transport layer (HTTPS and TLS).

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This change is provided only in sandbox.

 **Note:** We provide this 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. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document 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 features.

Who: This feature is available to customers who are part of the Change Data Capture Pilot.

How: To join the Change Data Capture Pilot, contact Salesforce.

SEE ALSO:

[Keep Your External Data Up to Date with Change Data Capture \(Pilot\)](#)

Require High-Assurance Sessions for Key Management Tasks (Generally Available)

Two-factor authentication is a powerful tool for keeping access to data and resources secure. You can now require two-factor authentication for key management tasks like generating, rotating, or uploading keys and certificates. When administrators try to manage encryption key, they must use a second form of authentication such as the Salesforce Authenticator app or a U2F security key. Breathe easy knowing that the security administrator handling your encryption key material is actually the person you hired (and trust) to do the job.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: When you assign users the Manage Encryption Key permission, you can require two-factor authentication when performing specific tasks.

On the Identity Verification page in Setup, locate Session Security Level Policies. Next to Manage Encryption Keys, select **Raise session to high-assurance** from the dropdown. Make sure that you provide security administrators a way to get a time-based, one-time password. This password is their second authentication factor. Otherwise, they can't complete encryption key-related tasks.

SEE ALSO:

[Salesforce Help: Two-Factor Authentication](#)

Opt Out of Key Derivation with BYOK (Generally Available)

Shield Platform Encryption's Bring Your Own Key (BYOK) service gives you more control of your uploaded key material. You can now opt out of key derivation on a key-by-key basis through the UI and API. When you opt out, you're in full control of your keys and have access to all key rotation features offered by the Shield Platform Encryption service. Because you can opt out on a key-by-key basis, you can still use the default BYOK service at any time. The default service combines your uploaded key material with our master secret to derive a unique data encryption key. When you opt out, you can upload a complete data encryption key that the Shield Key Management Service uses to encrypt and decrypt your data.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Who: To opt out of key derivation, customers must have the Manage Encryption Keys permission.

How: Contact Salesforce to enable this feature. Then on the Platform Encryption Advanced Settings page in Setup, enable **Allow BYOK to Opt Out of Key Derivation**. From then on, you can select or deselect the **Use Salesforce key derivation** option when you upload key material. You can also opt out on a key-by-key basis when you upload your key through the API.

SEE ALSO:

[Salesforce Help: Opt-Out of Key Derivation with BYOK \(can be outdated or unavailable during release preview\)](#)
[Changed Objects](#)

Event Monitoring: Hourly Event Logs, Continuation Callout Summary Event Type, and More Data in Lightning Event Types

Hourly event logs are now generally available to help you review org activity in near real time. A new event type helps you monitor long-running asynchronous callouts, and new Lightning event fields provide more detail about user activity in Lightning.

IN THIS SECTION:

[Get Hourly Event Logs to Improve Activity Visibility \(Generally Available\)](#)

You now receive event log files in hourly increments for recent activity, along with event log files after 24 hours of activity. Hourly event log files provide accelerated data, giving you quicker visibility into security anomalies and custom code performance issues.

[Measure Performance of Asynchronous Callouts in Event Log Files](#)

The Continuation Callout Summary event type in the EventLogFile object captures information about all the asynchronous callouts performed during a transaction, their response status codes, execution times, and URL endpoints. An asynchronous callout is a callout that is made from a Visualforce page for which the response is returned through a callback method. An asynchronous callout is also called a **continuation**.

[Track External Object Data Callouts with Event Log Files \(Generally Available\)](#)

The fields we added and updated for tracking Salesforce Connect callouts to external systems are now generally available. For each callout, you can check whether it was a query or write operation, when the call occurred, and which user accessed the external data.

[Track User Actions in Lightning Experience More Comprehensively with New Fields](#)

To give you a more precise view of user behavior in Lightning Experience and the Salesforce app, we added new fields to Lightning Error, Lightning Interaction, and Lightning Page View event types. For field details, see EventLogFile in [Changed Objects](#).

[Query Field Retired in API Event Type](#)

To enhance data protection, we retired the QUERY field from the API event type in the EventLogFile standard object.

[Unique ID Field Added to Insecure External Assets Event Type](#)

To make debugging insecure external assets easier, we've added the `UNIQUE_ID` field to the Insecure External Assets event type in the EventLogFile standard object. The `UNIQUE_ID` is a random 32-character ID of the event log file in which the insecure external asset event data is found.

[Friendlier Login Timeout Experience for Users](#)

If a login security policy request can't be handled quickly enough, the login attempt is blocked. Now users are redirected back to the login page so they can try again.

[Updated Resource Options for Transaction Security Entity Event Type](#)

The Entity event type no longer supports ClientBrowser, AuthSession, and LoginIP resources. These resources can prevent security policies from triggering, so we removed them from Setup and the API. If you have security policies that reference these resources, update those policies. Otherwise, they can't trigger or take the defined actions. The entity event type still supports authentication providers and Chatter resources.

[New Name for Event Monitoring Analytics App Setup](#)

Other Einstein Analytics apps plan to integrate with Event Monitoring in the future, so we changed the option text in Setup to reflect that.

Get Hourly Event Logs to Improve Activity Visibility (Generally Available)

You now receive event log files in hourly increments for recent activity, along with event log files after 24 hours of activity. Hourly event log files provide accelerated data, giving you quicker visibility into security anomalies and custom code performance issues.


Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions. Hourly files are available in the API but not in the Event Monitoring Analytics app, unless you contact Salesforce.

Who: To query or view hourly event log files, you must have API Enabled, View Event Log Files, and View All Files permissions.

Why: Suppose you're a security analyst monitoring for anomalous user behavior. By pulling in more frequent updates into your security system, you can be alerted within hours of a suspicious event, rather than 1–2 days later.

How: You automatically receive event log files approximately every hour in addition to 24-hour log files. Get hourly event log files by querying in the same way you query 24-hour log files, except set the `Interval` field to **Hourly**. For details, see the *REST API Developer Guide*. Keep in mind that:

- Hourly event log file integration with the Event Monitoring Analytics app is beta functionality available upon request. When hourly event log files are enabled in the Event Monitoring Analytics app, daily event log file data is unavailable. Data is refreshed once a day in the app, regardless of whether daily or hourly log files are used.

 **Note:** As a beta feature, hourly event log file integration with the Event Monitoring Analytics app is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

- Depending on event delivery and final processing time, an event is expected to take three to six hours from the time of the event to be available in the log file. However, it can take longer.
- If event transmission failures take too long to recover from, log files are retransmitted to ensure that they are delivered at least once. As a result, latent log files can sometimes contain duplicate event data. When your application consumes latent log files, make sure that your application handles duplicate event delivery.
- During Salesforce site switches, instance refreshes, or unplanned system outages, data loss can occur. For example, if Salesforce moves your production org instance, your event log files might have a gap in data. Salesforce makes commercially reasonable efforts to preserve event log file data integrity and avoid data loss. When Salesforce performs a site switch or instance refresh, it uses an automated process to replicate event logs.
- Hourly event log files are provided for you to review events in your orgs on an accelerated basis. However, it's possible that you don't get all event log data in hourly event log files, especially during site switches, instance refreshes, or unplanned system outages. For complete data, use the daily log files.

SEE ALSO:

[REST API Developer Guide: Generate Hourly Event Log Files \(can be outdated or unavailable during release preview\)](#)

Measure Performance of Asynchronous Callouts in Event Log Files

The Continuation Callout Summary event type in the EventLogFile object captures information about all the asynchronous callouts performed during a transaction, their response status codes, execution times, and URL endpoints. An asynchronous callout is a callout that is made from a Visualforce page for which the response is returned through a callback method. An asynchronous callout is also called a **continuation**.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

Why: For example, you can analyze Apex continuation data to measure performance (or execution time) of your long-running asynchronous callouts.

How: If you're an Event Monitoring customer, you automatically receive Continuation Callout Summary event log data when your users execute long-running asynchronous callouts.

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: Continuation Callout Summary Event Type \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: Make Long-Running Callouts from a Visualforce Page](#)

Track External Object Data Callouts with Event Log Files (Generally Available)

The fields we added and updated for tracking Salesforce Connect callouts to external systems are now generally available. For each callout, you can check whether it was a query or write operation, when the call occurred, and which user accessed the external data.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer edition. Available for an extra cost in Enterprise, Performance, and Unlimited editions. These events are available in the API but not in the Event Monitoring Analytics app.

Why: Now you can audit the historical activity of your org's access to external object data.

How: Use the new and updated fields in External Cross-Org Callout, External Custom Apex Callout, and External OData Callout event types. For more information, see EventLogFile in [Changed Objects](#).

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: External Cross-Org Callout Event Type](#)

[Object Reference for Salesforce and Lightning Platform: External Custom Apex Callout Event Type](#)

[Object Reference for Salesforce and Lightning Platform: External OData Callout Event Type](#)

Track User Actions in Lightning Experience More Comprehensively with New Fields

To give you a more precise view of user behavior in Lightning Experience and the Salesforce app, we added new fields to Lightning Error, Lightning Interaction, and Lightning Page View event types. For field details, see EventLogFile in [Changed Objects](#).

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

Why: For example, you can now see users' URL path which can be decoded to identify the page users were on and what they were doing there. As another example, you can see the specific record ID and type that your user viewed or downloaded in Lightning Experience to help you in a data loss investigation.

How: If you're an Event Monitoring customer, you automatically get these fields in event log data when your users work in Lightning Experience or the Salesforce app.

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: Lightning Error Event Type \(can be outdated or unavailable during release preview\)](#)

[Object Reference for Salesforce and Lightning Platform: Lightning Interaction Event Type \(can be outdated or unavailable during release preview\)](#)

[Object Reference for Salesforce and Lightning Platform: Lightning Page View Event Type \(can be outdated or unavailable during release preview\)](#)

[Changed Objects](#)

Query Field Retired in API Event Type

To enhance data protection, we retired the QUERY field from the API event type in the EventLogFile standard object.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: API Event Type \(can be outdated or unavailable during release preview\)](#)

[Changed Objects](#)

Unique ID Field Added to Insecure External Assets Event Type

To make debugging insecure external assets easier, we've added the `UNIQUE_ID` field to the Insecure External Assets event type in the EventLogFile standard object. The `UNIQUE_ID` is a random 32-character ID of the event log file in which the insecure external asset event data is found.

Where: This change applies to Enterprise, Performance, Unlimited, and Developer editions.

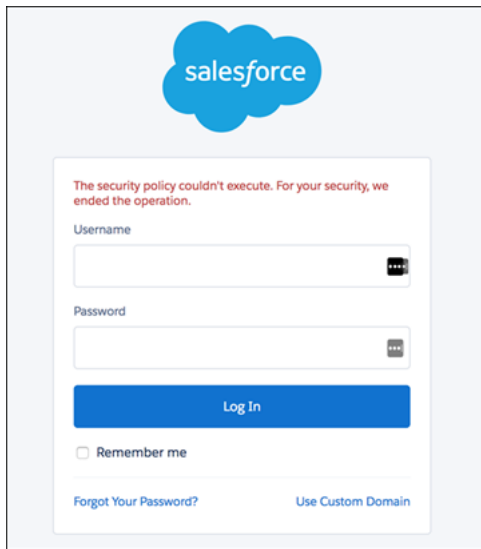
How: `UNIQUE_ID` is used by Salesforce Customer Support to troubleshoot any issues that occur.

Friendlier Login Timeout Experience for Users

If a login security policy request can't be handled quickly enough, the login attempt is blocked. Now users are redirected back to the login page so they can try again.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: Policies are metered to ensure that loads are balanced across the system. Previously, if login policies were blocked due to metering, users were redirected to a rather unfriendly browser page. Your users deserve better. Now they get a friendlier message on the login page that describes what's happening.



SEE ALSO:

[Salesforce Help: Transaction Security Metering](#)

Updated Resource Options for Transaction Security Entity Event Type

The Entity event type no longer supports ClientBrowser, AuthSession, and LoginIP resources. These resources can prevent security policies from triggering, so we removed them from Setup and the API. If you have security policies that reference these resources, update those policies. Otherwise, they can't trigger or take the defined actions. The entity event type still supports authentication providers and Chatter resources.

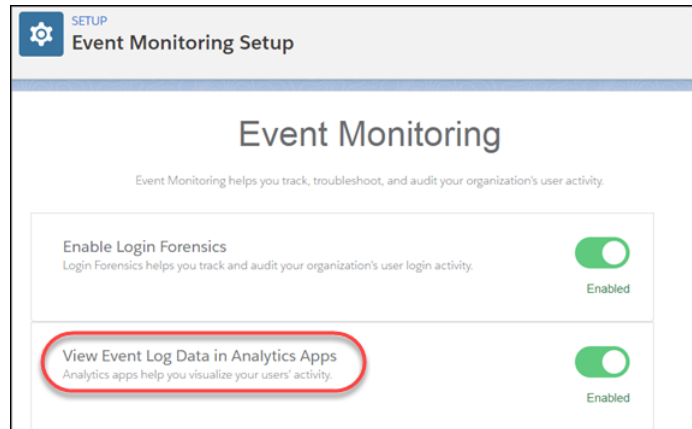
Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

New Name for Event Monitoring Analytics App Setup

Other Einstein Analytics apps plan to integrate with Event Monitoring in the future, so we changed the option text in Setup to reflect that.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: If you're an Event Monitoring customer, here's what you see now when you view the Event Monitoring Setup page. In Setup, in the Quick Find box, enter *Event Monitoring*, and then click **Event Monitoring Setup**.

**SEE ALSO:**

[Salesforce Help: Enable Analytics and Event Monitoring Integration with Analytics \(can be outdated or unavailable during release preview\)](#)

[REST API Developer Guide: Using Event Monitoring](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Security Health Check: Health Check Grades and New and Changed Settings

You now see a grade next to your Health Check Score. We added and changed settings in Security Health Check.

IN THIS SECTION:

[Assess Your Security with Health Check Grades](#)

In addition to a score, Security Health Check now provides a grade to more easily assess your org's overall security status. It's not always about getting to 100%. Sometimes a grade of Excellent is good enough.

[Health Check Has New and Changed Security Settings](#)

To improve security and make it easier to identify potential risks, we added two settings to Security Health Check. We also changed the name and risk of one setting.

Assess Your Security with Health Check Grades

In addition to a score, Security Health Check now provides a grade to more easily assess your org's overall security status. It's not always about getting to 100%. Sometimes a grade of Excellent is good enough.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Look for the grade next to your Health Check Score.



What scores do the grades correspond to?

90% and above = Excellent

80%–89% = Very Good

70%–79% = Good

55%–69% = Poor

54% and below = Very Poor

Health Check Has New and Changed Security Settings

To improve security and make it easier to identify potential risks, we added two settings to Security Health Check. We also changed the name and risk of one setting.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How:

We added the following high-risk setting:

- Number of expired certificates

We added the following informational setting:

- Enable HSTS for all Sites and Communities with the default force.com subdomain that require a secure connection (HTTPS)

We moved the Certificate Expiration setting from low-risk to informational, and changed its name to Days until certificate expiration.

SEE ALSO:

[Salesforce Help: Custom Baseline File Requirements \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: How Is the Health Check Score Calculated? \(can be outdated or unavailable during release preview\)](#)

Other Security Changes: My Domain and Domain Management Improvements

Rename your subdomain without contacting Salesforce Customer Support. And if you use an external service provider to serve your domain, you can point to their CNAME directly in Domain Management.

IN THIS SECTION:

[Rename Your My Domain When You Want](#)

If you have an existing My Domain subdomain, you can now rename it without contacting Salesforce Customer Support. My Domain lets you highlight your brand, so we're making it easier to change it when your company's name or branding changes.

[Stabilize the Hostname for My Domain URLs in Sandboxes \(Critical Update\)](#)

This critical update removes instance names from URLs. Prior to Summer '18, My Domain URLs in sandboxes included the instance name of the org. After this update, My Domain URLs for sandboxes exclude instance names.

[Specify External Hostname Values in Salesforce](#)

If you serve a custom domain with an external content delivery network (CDN) provider or your own server, you can point to it directly from Salesforce. When you add a custom domain to your org, Salesforce also creates an internal canonical name (CNAME), so you'll have a unique, consistent, and reliable DNS entry point to your org. The internal CNAME points to the external hostname.

Rename Your My Domain When You Want


If you have an existing My Domain subdomain, you can now rename it without contacting Salesforce Customer Support. My Domain lets you highlight your brand, so we're making it easier to change it when your company's name or branding changes.

Where: This change applies to Lightning Experience, Salesforce Classic, and all editions, except the Developer Edition.

Who: Renaming a My Domain is not available in trial or sandbox orgs.

How:

1. From Setup, enter *My Domain* in the Quick Find box, then select **My Domain**.
2. Under My Domain Settings, select **Edit**. Enter a new domain name.
3. Select **Check for availability**, and if the domain is available, select **Save**.

 **Note:** After you rename your My Domain subdomain, your previous My Domain is immediately deactivated. We recommend that you change the domain outside of normal business hours because this change briefly interrupts your Salesforce users. Before changing your My Domain, consider how to communicate this change to your users.

Stabilize the Hostname for My Domain URLs in Sandboxes (Critical Update)

This critical update removes instance names from URLs. Prior to Summer '18, My Domain URLs in sandboxes included the instance name of the org. After this update, My Domain URLs for sandboxes exclude instance names.

Where: This change applies to Lightning Experience, Salesforce Classic, and in Professional, Enterprise, Performance, Unlimited, and Database.com editions.

How: If you have existing sandbox orgs, activate the critical update on your production org, and in each sandbox org. Activating this critical update on a production org only applies the update to new and refreshed sandbox orgs.

Specify External Hostname Values in Salesforce

If you serve a custom domain with an external content delivery network (CDN) provider or your own server, you can point to it directly from Salesforce. When you add a custom domain to your org, Salesforce also creates an internal canonical name (CNAME), so you'll have a unique, consistent, and reliable DNS entry point to your org. The internal CNAME points to the external hostname.

Where: This change applies to Lightning Experience and Salesforce Classic in the Enterprise, Performance, and Unlimited editions.

How: From Setup, enter *Domains* in the Quick Find box, then select **Domains**. Add or edit any existing domain that uses an external host or CDN and specify the external hostname.

Salesforce IoT: Troubleshoot Orchestrations with Trackers, Monitor Orchestrations with Activity Log

Use Salesforce IoT Explorer Edition to process events from connected devices in near real time and create meaningful interactions with your customers. This release includes a new Tracker feature to help you troubleshoot issues with new orchestrations. It also includes an Activity Log for monitoring live orchestrations to make sure that everything is working right.

IN THIS SECTION:

[Troubleshoot Orchestrations with Trackers Before You Activate in Production](#)

Use trackers to identify and troubleshoot issues with your orchestrations before you activate them. A tracker provides a detailed history of recent orchestration activities and events by key so that you can identify and fix issues. You can validate your workflows so that you know that your processing logic works as you planned.


[Monitor Orchestrations for Continued Performance with Activity Log](#)

To help you monitor orchestrations and solve problems in production, the Activity Log provides detailed listings of orchestration actions and events. The listing can include events such as an orchestration instance going into an error state. It also shows routine actions such as when an orchestration was activated or deactivated. For example, let's say you have two orchestrations that monitor the temperature of the same swimming pool. You can track all activities to ensure that both are operating properly, and fix issues as they come up.

Troubleshoot Orchestrations with Trackers Before You Activate in Production

Use trackers to identify and troubleshoot issues with your orchestrations before you activate them. A tracker provides a detailed history of recent orchestration activities and events by key so that you can identify and fix issues. You can validate your workflows so that you know that your processing logic works as you planned.

Where: This change applies to Lightning Experience. Trackers are available in Enterprise, Performance, Unlimited, and Developer editions.

How: To set up a Tracker, from Setup, enter *IoT* in the Quick Find box, then select **Orchestrations**. Select an orchestration, and click . Enter a key value, and click **Start Tracker**.

Monitor Orchestrations for Continued Performance with Activity Log

To help you monitor orchestrations and solve problems in production, the Activity Log provides detailed listings of orchestration actions and events. The listing can include events such as an orchestration instance going into an error state. It also shows routine actions such as when an orchestration was activated or deactivated. For example, let's say you have two orchestrations that monitor the temperature of the same swimming pool. You can track all activities to ensure that both are operating properly, and fix issues as they come up.

Where: This change applies to Lightning Experience. Activity Log is available in Enterprise, Performance, Unlimited, and Developer editions.

How: To access the Activity Log, from Setup, enter *IoT* in the Quick Find box, then select **Activity Log**.

Development: Creating Your Own Salesforce App

More intelligence, new and improved components and APIs, and sweet tools for development. Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages.

IN THIS SECTION:

[Lightning Components: User-Level Debug Mode, New Navigation APIs, and Component Library is GA](#)

Enable debug mode for individual users without affecting the performance of Salesforce for other users of your org. The new navigation APIs give you more control when navigating to a component. The Component Library is now generally available.

[Einstein Platform Services: Image Recognition and Natural Language Processing](#)

Not a data scientist nor machine-learning expert but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train your own custom classifiers to solve a vast array of specialized image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind that text. Make your apps smarter and look like a genius at the same time.

[Visualforce: Lightning Experience Styling and Enhanced Security](#)

Develop apps to customize your org using Visualforce. Changes in this release help you develop apps with the look of Lightning Experience and improve your pages' security.

[Apex](#)

Apex now provides a `switch` statement, methods to help you get the developer name for record types more easily, and many other enhancements.

[Metadata](#)

Access more metadata types and Tooling API objects in API version 43.0. Enable users to modify metadata without giving them access to org data, too. Use custom metadata records to update shared values in multiple validation rules at once. Retrieve custom metadata type list views using Metadata API.

[API](#)

Access more of your organization's information in API version 43.0 using simple, powerful, and secure application programming interfaces.

[Debugging: Two New Debuggers, Updated Debug Log Formatting and Limits, and Logging Changes for Flows and Processes](#)

ISV Customer Debugger is available in Visual Studio Code, and we added Apex Replay Debugger, which simulates a debugging session using debug logs. We made some subtle but important changes to debug log lines. You can now store larger logs, but we added some limits to protect everyone from service degradation. Logging for flows and processes is now more robust.

[Salesforce Extensions for VS Code: Two New Debuggers](#)

In addition to the enhancements we've made in weekly releases, Salesforce Extensions for VS Code v43 includes two major enhancements: ISV Customer Debugger (formerly available only in Force.com IDE) and Apex Replay Debugger. These features are available when Salesforce Extensions for VS Code v43 is released on June 9, 2018.

[Salesforce CLI: Plug-In Development Support, Streamlined Packaging Commands, and Enhanced Debug Logging](#)

Use the Salesforce command-line interface (CLI) to easily create environments for development and testing, synchronize source code, run tests, and control the full application life cycle. These new and changed features are available when Salesforce CLI v43 is released on June 9, 2018.

[Scratch Orgs: New Features Available](#)

We're offering some new features for scratch orgs.

[Work with Health Cloud Managed Packages in Scratch Orgs](#)

By default, we have provisioned Enterprise and Developer edition scratch orgs with 10 Health Cloud permission set licenses. These licenses let you install and work with Health Cloud managed packages.

[Enterprise Messaging: Apex Testing Enhancements for Platform Events, High-Volume Platform Events \(Pilot\), and Change Data Capture \(Pilot\)](#)

Use events to simplify communication between business systems. This release includes Apex test support for flow and process event subscribers and on-demand test event delivery. Deliver millions of events efficiently with High-Volume Platform Events. Replicate Salesforce records to your external systems with Change Data Capture.

[Packaging: Not Just for Partners Anymore](#)

A package encapsulates all the changes that you're tracking between life-cycle stages in a versioned, distributable artifact. You can create first-generation and second-generation packages.

[ISVforce: Enhanced AppExchange Publishing Experience](#)

Distribute apps, Lightning components, and other solutions on AppExchange with the help of ISVforce tools. Get more flexibility when publishing Lightning Bolt Solutions, which now support custom apps, process flows, community templates, and pages. Use the Publishing Console to share your solution's logo and tile images with our marketing team.

Lightning Components: User-Level Debug Mode, New Navigation APIs, and Component Library is GA

Enable debug mode for individual users without affecting the performance of Salesforce for other users of your org. The new navigation APIs give you more control when navigating to a component. The Component Library is now generally available.

For more information, refer to the [Lightning Components Developer Guide](#).

IN THIS SECTION:

[Postponed "Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing" Critical Update](#)

This critical update, released in Spring '18, was scheduled for auto-activation in Summer '18, but has been postponed to Spring '19.

[Enable Debug Mode for Only the Users Who Need It](#)

When debugging Lightning component JavaScript code, enable debug mode only for the users who are actively debugging to not affect the performance of Salesforce for other users of your org. Salesforce is slower when running in debug mode. Now you can debug problems that appear in your production environment without worrying that other users will complain or even notice.

[New Lightning Navigation APIs for Lightning Components](#)

With the `lightning:isUrlAddressable` interface, you now control which Lightning components can be opened programmatically. You can also now easily capture URL parameters using the `v.pageReference` attribute and use the parameter values in your component. With the `lightning:navigation` component, define a `pageReference` object for navigating to a custom component that implements `lightning:isUrlAddressable` and set any attributes the component allows.

[Lightning Component Library Is Generally Available](#)

Tired of switching back and forth between the Developer Guide and the Component Library? Now, there's one single source of truth for reference documentation. Find the documentation you need for components, interfaces, and events in the Component Library. We removed this information from the Lightning Components Developer Guide. Reference documentation for system tags is still available in the Lightning Components Developer Guide.

[Component CSS Class Names Updated](#)

CSS class names used by Lightning components have changed to match the Block-Element-Modifier (BEM) notation that Salesforce Lightning Design System (SLDS) now uses. This change could impact custom components in your org.

[slds-form_inline Style Removed](#)

The `slds-form_inline` (formerly `slds-form--inline`) style was removed. When applied, the style made the element's width unchangeable. If you use `slds-form_inline` or `slds-form--inline` in your CSS, you'll see problems now that the style is removed.

[Lightning Container Components Have New Security Enhancements](#)

The `<lightning:container>` component checks that the component's namespace matches its static resource's namespace. The component also generates a confirmation token to ensure that raw `<iframe>` elements aren't used.

[Changes in Locker Service](#)

The Locker Service architectural layer enhances security by isolating individual Lightning components in their own containers and enforcing good coding practices. The framework uses Content Security Policy (CSP) to control the source of content that can be loaded on a page. Locker Service compatibility is improved in this release.

[Returning Blobs from the Server No Longer Causes Generic Errors](#)

Returning a blob used to cause a generic error that was hard to debug. Now, a blob returns the string, `"Blob (sizeofBlobInBytes) "`. To access the actual blob contents on the client, return a value as a JSON-serializable type, such as a string or integer, instead. On the client, you can convert the returned value to your preferred data structure in JavaScript.

[New and Changed Lightning Components](#)

Build user interfaces quickly with a bevy of new components.

[New and Changed Lightning Events](#)

Lightning events facilitate communication between components and increase interactivity in your apps.

[New and Changed Lightning Interfaces](#)

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

[Deprecated JavaScript API Methods](#)

These methods in `AuraLocalizationService` are deprecated.

Postponed “Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing” Critical Update

This critical update, released in Spring '18, was scheduled for auto-activation in Summer '18, but has been postponed to Spring '19.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the mobile app.

SEE ALSO:

[Spring '18 Release Notes: Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing \(Critical Update\)](#)

Enable Debug Mode for Only the Users Who Need It

When debugging Lightning component JavaScript code, enable debug mode only for the users who are actively debugging to not affect the performance of Salesforce for other users of your org. Salesforce is slower when running in debug mode. Now you can debug problems that appear in your production environment without worrying that other users will complain or even notice.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the mobile app.

Who: Any Salesforce user can enable debug mode for themselves. Salesforce admins and developers with access to Lightning components can enable debug mode as needed for any user in their org for debugging tasks.

In previous releases, debug mode was an org-wide setting. If you wanted to troubleshoot a problem for one user, the whole org needed to run in debug mode. For this reason, we recommended using debug mode only in Developer Edition and sandbox orgs.

In this release, you can enable debug mode for individual users, without affecting the performance of Salesforce for other users of your org. This change lets you debug problems that only appear in your production environment, without worrying that other users will complain, or even notice.

How: To enable debug mode for users in your org, go to the new Debug Mode Users page in Setup. Find the relevant users in the list, check the box next to their name, and click **Enable**. To turn debugging off, click **Disable**.

SETUP
User Debug Mode

User Debug Mode [Help for this Page](#)

Enable debug mode to make it easier to debug JavaScript code.

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**

<input type="checkbox"/>	Full Name ↑	Debug Mode	Alias	Username	Last Login	Role	Profile
<input type="checkbox"/>	Chatter Expert	<input type="checkbox"/>	Chatter	chatty_00drm0000005tv02ai_e628ifuqsbuu@chatter.salesforce.com			Chatter Free User
<input type="checkbox"/>	Jones, Mary	<input type="checkbox"/>	mjone	mjones@universalsamples.org			Standard User
<input type="checkbox"/>	Lime, Harry	<input checked="" type="checkbox"/>	HLime	malderete@universalsamples.org	3/7/2018, 1:39 PM		System Administrator

SEE ALSO:

[Lightning Components Developer Guide: Enable Debug Mode for Lightning Components](#)

New Lightning Navigation APIs for Lightning Components

With the `lightning:isUrlAddressable` interface, you now control which Lightning components can be opened programmatically. You can also now easily capture URL parameters using the `v.pageReference` attribute and use the parameter values in your component. With the `lightning:navigation` component, define a `pageReference` object for navigating to a custom component that implements `lightning:isUrlAddressable` and set any attributes the component allows.

Where: This change applies to orgs with Lightning components in Lightning Experience and all versions of the mobile app. These resources aren't supported in other containers, such as Lightning Components for Visualforce, Lightning Out, or Communities. This is true even if you access these containers inside Lightning Experience or the Salesforce mobile app.


Why: In standard navigation Lightning apps, you can use the `lightning:navigation` component to navigate to a custom component that implements `lightning:isUrlAddressable`. Using `lightning:navigation` with `pageReference` provides the following benefits over the now deprecated `force:navigateToComponent` for standard navigation Lightning apps.

- Gives you control over whether a component can be opened programmatically, and which attributes can be dynamically set when the component is opened.
- Control and manage which URL parameters are used in your component.
- Future-proofs your apps from changes in URL format.
- Generates a user-friendly URL for these components.

A page reference is associated with a particular type, which provides a set of attributes that are applicable for all pages of that type. The following types are supported.

- Knowledge Article Page
- Lightning Component (must implement `lightning:isUrlAddressable`)

- Named Page
- Navigation Item Page
- Object Page
- Record Page
- Record Relationship Page

 **Note:** The `lightning:isUrlAddressable` interface enables you to generate a user-friendly URL for a Lightning component with the pattern `/cmp/componentName` instead of the base-64 encoded route you get with `force:navigateToComponent`. We recommend that you use `lightning:isUrlAddressable` instead of `force:navigateToComponent`, which is now deprecated.

In Lightning console apps, you can open custom components that implement `lightning:isUrlAddressable` via `openSubtab()`, even from utilities.

See [Open Custom Lightning Components in Workspace Tabs and Subtabs](#).

SEE ALSO:

[Lightning Components Developer Guide: pageReference Types](#)
[New and Changed Lightning Events](#)

Lightning Component Library Is Generally Available

Tired of switching back and forth between the Developer Guide and the Component Library? Now, there's one single source of truth for reference documentation. Find the documentation you need for components, interfaces, and events in the Component Library. We removed this information from the Lightning Components Developer Guide. Reference documentation for system tags is still available in the Lightning Components Developer Guide.

Where: You can find the Component Library at developer.salesforce.com/docs/component-library. The Component Library is also available as an authenticated experience at `https://<myDomain>.lightning.force.com/componentReference/suite.app`, where `<myDomain>` is the name of your custom Salesforce domain.

Documentation for system tags, such as `<aura:component>`, and much more is in the Lightning Components Developer Guide at developer.salesforce.com/docs/atlas.en-us.lightning.meta/lightning/.

In Spring '18, we announced that reference documentation for interfaces is available in the Component Library. In Summer '18, you also get reference documentation for events in the Component Library.

Component CSS Class Names Updated

CSS class names used by Lightning components have changed to match the Block-Element-Modifier (BEM) notation that Salesforce Lightning Design System (SLDS) now uses. This change could impact custom components in your org.

Where: This change affects custom Lightning components with component-specific CSS that implements any SLDS class that contains a double dash in its name. This change applies to Lightning Experience in all editions.

Why: Class names with a double dash now use a single underscore in place of the double dash. The CSS class `slds-p-around--small` becomes `slds-p-around_small`, for example. If you have created custom CSS in your components that reference an SLDS class that contains a double dash, update your selectors to use a single underscore.

SEE ALSO:

[Salesforce Lightning Design System FAQ](#)

`slds-form_inline` Style Removed

The `slds-form_inline` (formerly `slds-form--inline`) style was removed. When applied, the style made the element's width unchangeable. If you use `slds-form_inline` or `slds-form--inline` in your CSS, you'll see problems now that the style is removed.

Where: This change affects Lightning components that support the `label-hidden` variant: `lightning:input`, `lightning:combobox`, `lightning:dualListbox`, `lightning:radioGroup`, `lightning:select`, and `lightning:textarea`. The style is no longer applied when you use the `label-hidden` variant, but you shouldn't notice a difference in the rendering of the components in most cases.

Why: The `slds-form_inline` style was mistakenly applied by the `label-hidden` variant.

The style wasn't intended to be used directly in custom components, but was sometimes used to set a fixed width of a component. Instead, you can use the styles described in <https://lightningdesignsystem.com/utilities/sizing/>.

Lightning Container Components Have New Security Enhancements

The `<lightning:container>` component checks that the component's namespace matches its static resource's namespace. The component also generates a confirmation token to ensure that raw `<iframe>` elements aren't used.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

How: For instance, if the `<lightning:container>` component has the namespace "vendor1," the static resource's namespace must also be "vendor1." If the namespaces are different, an error message appears.

```
<aura:component>
  <lightning:container
    src="{!$Resource.vendor1__resource + '/code_belonging_to_vendor1'}"
    onmessage="{!c.vendor1__handles}"/>
</aura:component>
```

Raw `<iframe>` elements are not permitted in Lightning container components. This rule is enforced by the required query parameter `_CONFIRMATIONTOKEN`, which generates a unique ID for each user session. Instead, use the `$Resource` global value provider to build the resource URL for the `<lightning:container>` component.

```
<aura:component>
  <lightning:container
    src="{!$Resource.vendor2__resource + '/index.html' }"/>
</aura:component>
```

SEE ALSO:

[Lightning Components Developer Guide: Lightning Container Component Security Requirements](#)

Changes in Locker Service

The Locker Service architectural layer enhances security by isolating individual Lightning components in their own containers and enforcing good coding practices. The framework uses Content Security Policy (CSP) to control the source of content that can be loaded on a page. Locker Service compatibility is improved in this release.

`eval()` Is Now Available

The `eval()` function is now available in Locker Service, even when Strict CSP is enabled. This addition improves support for third-party libraries that evaluate code dynamically.

Limitation: In Locker Service, `eval()` always works in the global scope of the namespace. The `eval()` function can't access the local variables within the scope in which it's called. Normally, `eval()` has two modes of execution. When you invoke `eval()` directly, it works in the local scope. When you invoke it via a reference, it works in the global scope. Locker Service supports only the latter.

For example, suppose that you execute the following code.

```

window.foo = 1;
function bar() {
  var foo = 2;
  return eval("foo");
}

```

A call to `bar()` returns 2 when evaluation is performed in the local scope, and returns 1 when it's performed in the global scope. If you must use variables from the local scope, refactor your code. Use a `Function()`, declare the local variables as parameters, pass them as arguments, and add a return statement.

```

window.foo = 1;
function bar() {
  var foo = 2;
  return Function("foo", "return foo")(foo);
}

```

Performance Optimizations

Code executing inside Locker Service now runs faster, thanks to a new system of static references that allow the browser's just-in-time optimizer to accelerate execution.

Cleaner Debugging

Previously, the process of sandboxing code in Locker Service introduced various wrappers around the code. Those wrappers were visible and confusing to users during debugging. The updated engine no longer needs wrappers, and your code looks the same whether Locker Service is on or off.

Returning Blobs from the Server No Longer Causes Generic Errors

Returning a blob used to cause a generic error that was hard to debug. Now, a blob returns the string, `"Blob (sizeofBlobInBytes) "`. To access the actual blob contents on the client, return a value as a JSON-serializable type, such as a string or integer, instead. On the client, you can convert the returned value to your preferred data structure in JavaScript.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the mobile app.

How: You can return a blob from a server-side controller by:

- Returning an object that contains a blob object, such as `ContentNote`
- Returning the results of a SOQL query that references a blob field
- Returning an Apex object containing a field of type `Blob`

In all cases, the value returned is the string describing its size.

New and Changed Lightning Components

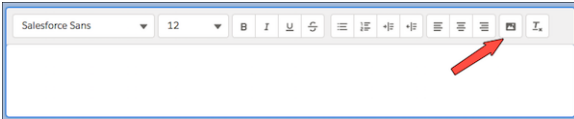
Build user interfaces quickly with a bevy of new components.

New Components

The following components are new and require API version 43.0 and later.

lightning:insertImageButton

Adds an insert image button to the toolbar of the `lightning:inputRichText` rich text editor. The button opens the native file browser so that you can select an image to upload and inserts the image inline in the text area. You can use this component only as a subcomponent within the `lightning:inputRichText` component.




lightning:navigation

Generates a URL for the given `pageReference` object, which describes a page's type, attributes, and state. For more information, see [New Lightning Navigation APIs for Lightning Components](#).

lightning:navigationItemAPI

Provides access to methods for programmatically controlling navigation items in Lightning console apps in which navigation items display in an item menu. This component provides access to the following Lightning Console JavaScript API methods:


- `focusNavigationItem()`
- `getNavigationItems()`
- `getSelectedNavigationItem()`
- `refreshNavigationItem()`

 **Note:** This component provides similar functionality to some of the Salesforce Console Integration Toolkit JavaScript APIs available in Salesforce Classic.

For more information, see [Salesforce Console API](#).

lightning:nextBestActions (Pilot)

Executes a recommendation strategy, and displays the resulting propositions. Each proposition launches a screen flow. For more information, see [Einstein Next Best Action: Use Strategies to Recommend Actions and Offers \(Pilot\)](#).

 **Note:** We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

lightning:quickActionAPI

Provides access to methods for interacting with the quick actions on a Lightning page. Use this component to call the Lightning Quick Action JavaScript APIs. This component provides similar functionality to the Salesforce Classic Publisher JavaScript APIs. For more information, see [Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs](#).

lightning:recordForm

Streamlines creating a form to add, view, or update a record. This component makes it easier to create record forms than building them manually with `lightning:recordEditForm` and `lightning:recordViewForm`. Set the `mode` attribute to `view`, `edit`, or `readonly` to specify the type of form. This form was created by specifying `mode="edit"` to add a record.

The screenshot shows a Lightning record form with the following fields:

- Salutation:** A dropdown menu with "--None--" selected.
- First Name:** A text input field.
- Last Name:** A text input field.
- Email:** A text input field.
- Business Phone:** A text input field.
- Title:** A text input field.
- Account ID:** A text input field with a search icon and the placeholder text "Search Accounts...".

At the bottom of the form, there are two buttons: "Cancel" and "Save".

lightningsnapin:minimizedAPI

Enables customization of the user interface for the minimized snap-in in Snap-ins Chat.

lightningsnapin:settingsAPI

Enables access to the Live Agent button ID and Live Agent deployment ID for use in the custom pre-chat and minimized components for Snap-ins Chat.

Components Now Generally Available

The following components which were beta in previous releases are now generally available:

- `lightning:comboBox`
- `lightning:fileUpload`
- `lightning:formattedDateTime`
- `lightning:formattedNumber`
- `lightning:input`
- `lightning:relativeDateTime`

Changed Components

The following components have changed.

lightning:container

This component now checks that its namespace matches its static resource's namespace. The component also generates a confirmation token to ensure that raw `<iframe>` elements aren't used. For more information, see [Lightning Container Components Have New Security Enhancements](#).

lightning:datatable

This component now supports mass inline editing, so you can edit content in multiple table cells and save the changes in one step. The component verifies that you want to update multiple items before it applies your changes.

Columns now support horizontal alignment with the `cellAttributes` property.

The following attributes are new.

- `errors`—Specifies an object containing information about cell-level, row-level, and table-level errors. Error messages are displayed in the table accordingly.

- `oncellchange`—The action triggered when a cell's value changes after an inline edit. Returns the `draftValues` object.
- `oncancel`—The action triggered when clicking **Cancel** in the table footer during an inline edit.
- `onsave`—The action triggered when clicking **Save** in the table footer during an inline edit. Returns the `draftValues` object.

The following column property is new.

- `editable`—Specifies whether a column supports inline editing. The default is `false`.

The following values for the `type` column property are new.

- `boolean`—Displays a checkbox in the column of a Boolean data type.
- `date-local`—Displays a date field only, not a date and time field.

The following attribute for the `cellAttributes` column property is new.

- `alignment`—Specifies where to align data horizontally in a column. Allowed values are `center`, `right`, or `left`.

lightning:flow

The `onstatuschange` attribute returns `activeStages` and `currentStage`. These additional parameters, which were beta in Spring '18, are now generally available.

lightning:icon

You can now use your own custom icons in addition to the icons at <https://lightningdesignsystem.com/icons>. Use the new `src` attribute to specify the path to the resource for a custom icon such as an SVG sprite. For example, you could specify:

```
src="path/to/customSvgSprite.svg#my-icon"
```

lightning:input

The following types now implement Lightning Design System styling.

- `color`
- `date`
- `datetime`
- `time`

The `datetime` input type supports a new `timezone` attribute, which enables you to specify a time zone that's different from your Salesforce time zone setting.

The `date`, `datetime`, and `time` types now format the date based on the user's locale setting in Salesforce. Prior to the Summer '18 release, the component formatted based on the user's browser locale. On mobile devices, the component uses the native date and time pickers as before, but on desktop the component uses the Lightning date and time pickers.

lightning:inputAddress

The following attribute is new.

- `fieldLevelHelp`—Help text detailing the purpose and function of the address compound field.

lightning:inputName

The following attribute is new.

- `fieldLevelHelp`—Help text detailing the purpose and function of the name compound field.

lightning:inputRichText

This component now supports pasting inline images that you copied from a browser window into the text editor. In Chrome and Safari on macOS, you can also paste inline images copied from the desktop.

On all platforms, you can use the new `lightning:insertImageButton` as a child component. This component adds a button to the editor's toolbar to enable uploading an image from the desktop.

The following attributes are new.

- `label`—Text label for the rich text editor.
- `labelVisible`—Specifies whether the label is visible or detected only by screen readers. The default is `false`.

lightning:tree

The following attribute is new.

- `metatext`—Text to provide users with supplemental information and aid with identification or disambiguation.

lightning:utilityBarAPI

This component has a new method.

- `onUtilityClick()`—Registers an event handler for the utility. This event handler is called when the utility is clicked.

For more information, see [Salesforce Console API](#).

lightning:workspaceAPI

This component has new methods.

- `refreshTab()`—Refreshes a workspace tab or a subtab specified by `tabId`. Keep in mind that the first subtab has the same `tabId` as the workspace tab.
- `disableTabClose()`—Prevents a workspace tab or subtab from closing. This method removes the close button from a tab or subtab, and disables the keyboard shortcuts that close tabs and subtabs.

For more information, see [Salesforce Console API](#).

New and Changed Lightning Events

Lightning events facilitate communication between components and increase interactivity in your apps.

New Events

The following event is new.

forceCommunity: deflectionSignal

A `lightningcommunity: deflectionSignal` event is fired when a community user is going through a process to solve an issue, and then views a deflection item that could potentially resolve their issue early. For example, a user is filling out a form to create a case in a community when they see a recommended useful article. The article proves helpful, and the community user no longer needs to file a case with support. This event is available only in Lightning communities.

Deprecated Events

These application events can be fired by every component in your app. Unless your component is running in complete isolation in a standalone app and not included in complex apps, such as Lightning Experience or the Salesforce mobile app, the container app can trigger your event handler multiple times. This behavior makes it difficult to handle each event appropriately.

The following system events are deprecated.

aura: doneRendering

Use the [render event](#) on your application or component instead.

aura: doneWaiting

To determine when an action is complete, use the response status in an action's callback instead.

aura: waiting

Execute logic after queuing an action instead of using this event. A component is waiting for a response for an action until the action's callback is invoked.

The `force:navigateToComponent` event is deprecated. This event base64 encodes the component, which leaves it susceptible to cross-site scripting attacks. Instead, implement the `lightning:isUrlAddressable` interface on the target component and navigate to the component using the `lightning:navigation` component with the `standard__component` page type. This process generates a route in the format `/cmp/{componentName}?myAttr=attrValue`. This workflow opens tabs and subtabs to custom components without exposing security concerns.

New and Changed Lightning Interfaces

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

New Interfaces

The following interfaces are new.

lightning:availableForFlowActions

Enables using a component's client-side controller as an action in a flow. For more information, see [Perform Local Actions in Flows by Using Lightning Components \(Generally Available\)](#).

lightning:hasPageReference

Enables a component to include a `pageReference` object as an attribute. This interface is used by `lightning:isUrlAddressable`.

lightning:isUrlAddressable

Enables navigating directly to a component from a URL. For more information, see [New Lightning Navigation APIs for Lightning Components](#).

lightningsnapin:minimizedUI

Enables using a component as a custom Lightning page template for the snap-in when it's minimized. For use with Snap-ins Chat only.

Deprecated JavaScript API Methods

These methods in `AuraLocalizationService` are deprecated.

- `getLocalizedDateTimeLabels()`
- `isPeriodTimeView()`
- `toISOString()`

Einstein Platform Services: Image Recognition and Natural Language Processing

Not a data scientist nor machine-learning expert but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train your own custom classifiers to solve a vast array of specialized image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind that text. Make your apps smarter and look like a genius at the same time.

IN THIS SECTION:

[Get Twice as Many Free Predictions](#)

The free tier of service now includes 2,000 free predictions each calendar month (increased from 1,000 free predictions). You can use predictions interchangeably across Einstein Vision and Language.

[Reset Your Einstein Platform Services Private Key](#)

When you sign up for an Einstein account, you get a private key in the form of a .pem file. You use this key to generate an access token which is required to make API calls. But sometimes things happen. If you lose your private key, you can request a new one.

[Use a Refresh Token to Generate an Access Token](#)

You can use a refresh token instead of your private key to generate an access token. A refresh token is a JWT token that never expires. You can't use a refresh token to make an authenticated API call.

[Einstein Vision: Deleting Image Datasets and Image Models](#)

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

[Einstein Language: Deleting Text Datasets and Text Models](#)

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

Get Twice as Many Free Predictions

The free tier of service now includes 2,000 free predictions each calendar month (increased from 1,000 free predictions). You can use predictions interchangeably across Einstein Vision and Language.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

SEE ALSO:

[Einstein Platform Services Developer Guide: Rate Limits](#)

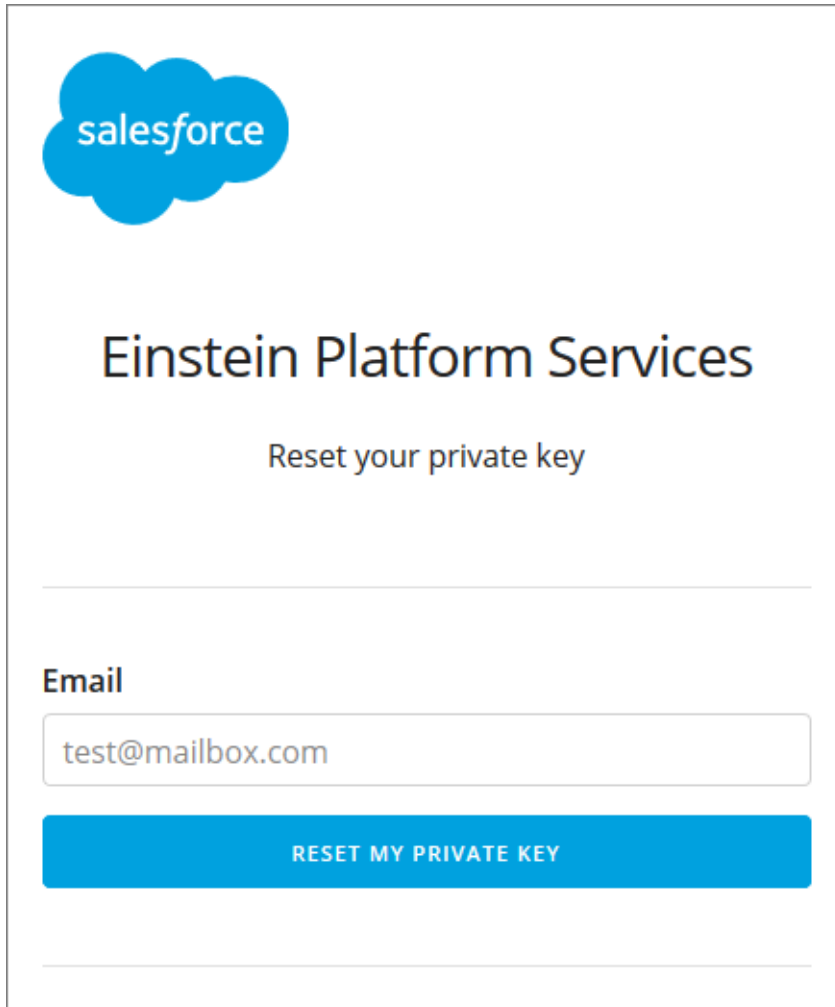
[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Reset Your Einstein Platform Services Private Key

When you sign up for an Einstein account, you get a private key in the form of a .pem file. You use this key to generate an access token which is required to make API calls. But sometimes things happen. If you lose your private key, you can request a new one.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: Navigate to the reset page at <https://api.einstein.ai/reset>. Enter the email address associated with your Einstein Platform Services account, and follow the instructions.



Resetting your key generates a new key, but you still have access to your datasets and models. However, your previous key no longer works.

SEE ALSO:

[Einstein Platform Services Developer Guide: Reset Your Private Key](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Use a Refresh Token to Generate an Access Token

You can use a refresh token instead of your private key to generate an access token. A refresh token is a JWT token that never expires. You can't use a refresh token to make an authenticated API call.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

Why: Use a refresh token for apps that don't have access to the private key, such as mobile apps. A third-party system can generate the refresh token using the private key and provide it to the mobile app. The app then uses the refresh token to generate an access token, which is then used to make calls to an Einstein Platform Services API.

How: To get an access token using a refresh token, you must first get the refresh token using the private key contained in the .pem file. You then use the refresh token to generate an access token. Here's the process to get a refresh token.

- Read in the private key.
- Create the JWT payload, which looks similar to this JSON.

```
{
  "sub": "<EMAIL_ADDRESS>",
  "aud": "https://api.einstein.ai/v2/oauth2/token",
  "exp": <EXPIRATION_SECONDS_IN_UNIX_TIME>
}
```

- Sign the JWT payload with a private key to generate an assertion.
- Call the API, and pass in the assertion string along with the `scope=offline` parameter. Here's an example using cURL.

```
curl -H "Content-type: application/x-www-form-urlencoded" -X POST
https://api.einstein.ai/v2/oauth2/token -d
"grant_type=urn:ietf:params:oauth:grant-type:jwt-bearer&assertion=<ASSERTION_STRING>&scope=offline"
```

- The call returns with a response that looks like this JSON. The token values are shortened for readability.

```
{
  "access_token": "SPFPQ5IBLB6DPE6FKPWHMIWW4MCRICX4M4KQ...",
  "refresh_token": "FL4GSVQS4W5CKSFRVZBLPIVZZJ2K4VIFPLG...",
  "token_type": "Bearer",
  "expires_in": "120"
}
```

Now that you have a refresh token, you can use it to get an access token. Call the `/v2/oauth2/token` endpoint, and pass the refresh token along with these parameters.

- `grant_type`—Specify the string `refresh_token`.
- `refresh_token`—The refresh token you created.
- `valid_for`—Number of seconds until the access token expires. The default is 60 seconds. The maximum value is 2592000 seconds (30 days).

Here's an example cURL call with a shortened refresh token.

```
curl -H "Content-type: application/x-www-form-urlencoded" -X POST
https://api.einstein.ai/v2/oauth2/token -d
"grant_type=refresh_token&refresh_token=FL4GSVQS4W5CKSFRVZBLPIVZZJ2K4VIFPLGZ45SJ...&valid_for=60"
```

The response looks like this JSON.

```
{
  "access_token": "LA5JPHC6J2FOVPXVU36HW7WUF3GNNZC5PINC6NX272CEFCWGNIBB...",
  "token_type": "Bearer",
  "expires_in": "60"
}
```

SEE ALSO:

[Einstein Platform Services Developer Guide: Generate an OAuth Token Using a Refresh Token](#)

[Einstein Platform Services Developer Guide: Generate an OAuth Token](#)

[Einstein Platform Services Developer Guide: Generate an OAuth Access Token](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Einstein Vision: Deleting Image Datasets and Image Models

Einstein Vision enables you to tap into the power of AI and train deep-learning models to recognize and classify images at scale. You can use pre-trained classifiers or train your own custom classifiers to solve unique use cases.

IN THIS SECTION:

[Deleting an Image Dataset Returns a New Status Code and Response](#)

The delete dataset API call no longer returns a 204 status code for a successful dataset deletion. Instead, the API returns a 200 status code, indicating that the dataset deletion response was successfully received, but the deletion has yet to be completed. Deleting a dataset no longer deletes the associated models. You must explicitly delete models.

[Explicitly Delete an Image Model to Remove It](#)

Deleting a dataset no longer deletes the models associated with the dataset. Instead, use this new API endpoint to delete a model.

[Get the Status of an Image Dataset or Model Deletion](#)

When you delete an image dataset or model, the deletion doesn't occur immediately. To confirm whether a dataset or model has been deleted, use this new API endpoint.

SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Deleting an Image Dataset Returns a New Status Code and Response

The delete dataset API call no longer returns a 204 status code for a successful dataset deletion. Instead, the API returns a 200 status code, indicating that the dataset deletion response was successfully received, but the deletion has yet to be completed. Deleting a dataset no longer deletes the associated models. You must explicitly delete models.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: In addition to the new status code, the call returns a JSON response with a deletion ID. You can use this ID to query the status of the deletion. The response looks similar to this JSON.

```
{
  "id": "Z2JTFBF3A7XKIJC5QEJXMO4HSY",
  "organizationId": "108",
  "type": "DATASET",
  "status": "QUEUED",
  "progress": 0,
  "message": null,
  "object": "deletion",
  "deletedObjectId": "1003360"
}
```

SEE ALSO:

[Einstein Platform Services Developer Guide: Delete a Dataset](#)

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Explicitly Delete an Image Model to Remove It

Deleting a dataset no longer deletes the models associated with the dataset. Instead, use this new API endpoint to delete a model.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: This cURL call deletes the model.

```
curl -X DELETE -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache" -H "Content-Type: multipart/form-data" https://api.einstein.ai/v2/vision/models/<MODEL_ID>
```

The response looks similar to this JSON.

```
{
  "id": "2GAUJLAG3L5WFQE6GYTOM4O2IM",
  "organizationId": "108",
  "type": "MODEL",
  "status": "QUEUED",
  "progress": 0,
  "message": null,
  "object": "deletion",
  "deletedObjectId": "P3NDGNJFA5JG5J7RW54WUZDWGI"
}
```

After you delete a model, use the `id` to check the status of the deletion.

SEE ALSO:

[Einstein Platform Services Developer Guide: Delete a Model](#)

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Get the Status of an Image Dataset or Model Deletion

When you delete an image dataset or model, the deletion doesn't occur immediately. To confirm whether a dataset or model has been deleted, use this new API endpoint.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: This cURL call gets the deletion status. When you make a call to delete a dataset or model, the response contains an `id` field. Replace the `<DELETION_ID>` value with this field value.

```
curl -X GET -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache" https://api.einstein.ai/v2/vision/deletion/<DELETION_ID>
```

The response looks similar to this JSON.

```
{
  "id": "C453RKMRAVUCXFJB4ZXGN3PKY4",
  "organizationId": "108",
  "type": "DATASET",
  "status": "SUCCEEDED",
  "progress": 1,
  "message": null,
  "object": "deletion",
}
```



```

    "deletedObjectId": "1003528"
  }

```

Valid status values are:

- **QUEUED**—Object deletion hasn't started.
- **RUNNING**—Object deletion is in progress.
- **SUCCEEDED**—Object deletion is complete.
- **SUCCEEDED_WAITING_FOR_CACHE_REMOVAL**—The object was deleted, but it can take up to 30 days to delete related files that are cached in the system.

SEE ALSO:

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Einstein Language: Deleting Text Datasets and Text Models

Use the Einstein Language APIs to build natural language processing into your apps and unlock powerful insights within text. The language APIs include the Einstein Intent API and the Einstein Sentiment API.

IN THIS SECTION:

[Deleting a Text Dataset Returns a New Status Code and Response](#)

The delete dataset API call no longer returns a 204 status code for a successful dataset deletion. Instead, the API returns a 200 status code, indicating that the dataset deletion response was successfully received, but the deletion has yet to be completed. Deleting a dataset no longer deletes the associated models. You must explicitly delete models.

[Explicitly Delete a Text Model to Remove It](#)

Deleting a dataset no longer deletes the models associated with the dataset. Instead, use this new API endpoint to delete a model.

[Get the Status of a Text Dataset or Model Deletion](#)

When you delete an image dataset or model, the deletion doesn't occur immediately. To confirm whether a dataset or model has been deleted, use this new API endpoint.

SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language](#)

[Salesforce Einstein: Forecasting, Bots, Discovery Recommendations, and Other Genius Enhancements](#)

Deleting a Text Dataset Returns a New Status Code and Response

The delete dataset API call no longer returns a 204 status code for a successful dataset deletion. Instead, the API returns a 200 status code, indicating that the dataset deletion response was successfully received, but the deletion has yet to be completed. Deleting a dataset no longer deletes the associated models. You must explicitly delete models.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: In addition to the new status code, the call returns a JSON response with a deletion ID. You can use this ID to query the status of the deletion. The response looks similar to this JSON.

```

{
  "id": "S3C540PF3UMROLXCR2C3FZA3ZU",

```

```

    "organizationId": "108",
    "type": "DATASET",
    "status": "QUEUED",
    "progress": 0,
    "message": null,
    "object": "deletion",
    "deletedObjectId": "1000518"
  }

```

SEE ALSO:

[Einstein Platform Services Developer Guide: Delete a Dataset](#)

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Explicitly Delete a Text Model to Remove It

Deleting a dataset no longer deletes the models associated with the dataset. Instead, use this new API endpoint to delete a model.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: This cURL call deletes the model.

```

curl -X DELETE -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache" -H
"Content-Type: multipart/form-data" https://api.einstein.ai/v2/language/models/<MODEL_ID>

```

The response looks similar to this JSON.

```

{
  "id": "FMEMQAUE3I2HHU5AS6RTTGNXKI",
  "organizationId": "108",
  "type": "MODEL",
  "status": "QUEUED",
  "progress": 0,
  "message": null,
  "object": "deletion",
  "deletedObjectId": "WEQ6PHPBGFYVX5C7QDP6XU3NXY"
}

```

After you delete a model, use the `id` to check the status of the deletion.

SEE ALSO:

[Einstein Platform Services Developer Guide: Delete a Model](#)

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Get the Status of a Text Dataset or Model Deletion

When you delete an image dataset or model, the deletion doesn't occur immediately. To confirm whether a dataset or model has been deleted, use this new API endpoint.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

How: This cURL call gets the deletion status. When you make a call to delete a dataset or model, the response contains an `id` field. Replace the `<DELETION_ID>` value with this field value.

```
curl -X GET -H "Authorization: Bearer <TOKEN>" -H "Cache-Control: no-cache"
https://api.einstein.ai/v2/language/deletion/<DELETION_ID>
```

The response looks similar to this JSON.

```
{
  "id": "FMEMQAUE3I2HHU5AS6RTTGXKI",
  "organizationId": "108",
  "type": "MODEL",
  "status": "SUCCEEDED_WAITING_FOR_CACHE_REMOVAL",
  "progress": 1,
  "message": "The model WEQ6PHPBGFYVX5C7QDP6XU3NXY has been deleted. It may take up to
an additional 30 days to delete some related files cached in the system",
  "object": "deletion",
  "deletedObjectId": "WEQ6PHPBGFYVX5C7QDP6XU3NXY"
}
```

Valid status values are:

- `QUEUED`—Object deletion hasn't started.
- `RUNNING`—Object deletion is in progress.
- `SUCCEEDED`—Object deletion is complete.
- `SUCCEEDED_WAITING_FOR_CACHE_REMOVAL`—The object was deleted, but it can take up to 30 days to delete related files that are cached in the system.

SEE ALSO:

[Einstein Platform Services Developer Guide: Get Deletion Status](#)

Visualforce: Lightning Experience Styling and Enhanced Security

Develop apps to customize your org using Visualforce. Changes in this release help you develop apps with the look of Lightning Experience and improve your pages' security.

For more information on features affected by these enhancements, refer to the [Visualforce Developer's Guide](#).

IN THIS SECTION:

[Apply Lightning Experience Stylesheets to Visualforce Pages \(Generally Available\)](#)

We're happy to announce that the Lightning Experience Stylesheets feature introduced in Winter '18 is now generally available. Style your Visualforce pages with the look of Lightning Experience when viewed in Lightning Experience or the Salesforce app. This attribute doesn't change the styling when the page is viewed in Salesforce Classic.

[Lightning Experience Stylesheets Are Updated](#)

The Visualforce page `<body>` element now includes the CSS scoping class `slds-vf-scope` when `lightningStylesheets="true"` in the `<apex:page>` tag. The scoping class matches your content to the Lightning Experience UI. When the `lightningStylesheets` attribute is set to `true`, it overrides the `standardStylesheets` attribute.

[Lightning Experience Stylesheets Support Custom Theming](#)

The `lightningStylesheets` attribute can incorporate your organization's theme in your Visualforce pages. Style your page with Salesforce's built-in themes or custom themes you create yourself.

[Quickly Identify the Salesforce Theme That Users See in JavaScript](#)

If you use a lot of JavaScript in your pages and apps, identifying the Salesforce user experience helps you manage navigation in your JavaScript code. Detecting the Salesforce theme used to require multiple steps and utility functions. The streamlined process involves one new function: `UITheme.getUITheme()`.

[Enable Clickjack Protection for Visualforce Pages in the Salesforce Classic Console](#)

If you disabled clickjack protection due to issues with Visualforce in the Salesforce Classic Console, including Salesforce Health Cloud, enable clickjack protection for your Visualforce pages. Previously, to use Visualforce pages in the Salesforce Classic Console, you had to disable clickjack protection for all Visualforce pages.

Apply Lightning Experience Stylesheets to Visualforce Pages (Generally Available)

We're happy to announce that the Lightning Experience Stylesheets feature introduced in Winter '18 is now generally available. Style your Visualforce pages with the look of Lightning Experience when viewed in Lightning Experience or the Salesforce app. This attribute doesn't change the styling when the page is viewed in Salesforce Classic.

Where: This feature is available in Lightning Experience and all versions of the Salesforce app in all editions.

How: To style your Visualforce page, set `lightningStylesheets="true"` in the `<apex:page>` tag.

SEE ALSO:

[Lightning Experience Stylesheets Support Custom Theming](#)

[Visualforce Developer Guide: Style Existing Visualforce Pages with Lightning Experience Stylesheets](#)

Lightning Experience Stylesheets Are Updated

The Visualforce page `<body>` element now includes the CSS scoping class `slds-vf-scope` when `lightningStylesheets="true"` in the `<apex:page>` tag. The scoping class matches your content to the Lightning Experience UI. When the `lightningStylesheets` attribute is set to `true`, it overrides the `standardStylesheets` attribute.

Where: This feature is available in Lightning Experience and all versions of the Salesforce app in all editions.

How: If you set `applyBodyTag` or `applyHtmlTag` to `false`, you must manually add the scoping class `slds-vf-scope`. For example:

```
<apex:page lightningStylesheets="true" applyHtmlTag="false" applyBodyTag="false">
<body class="slds-vf-scope">
    <!-- Your Lightning-styled Visualforce content -->
</body>
```

```
</apex:page>
```

SEE ALSO:

[Apply Lightning Experience Stylesheets to Visualforce Pages \(Generally Available\)](#)

[Lightning Experience Stylesheets Support Custom Theming](#)

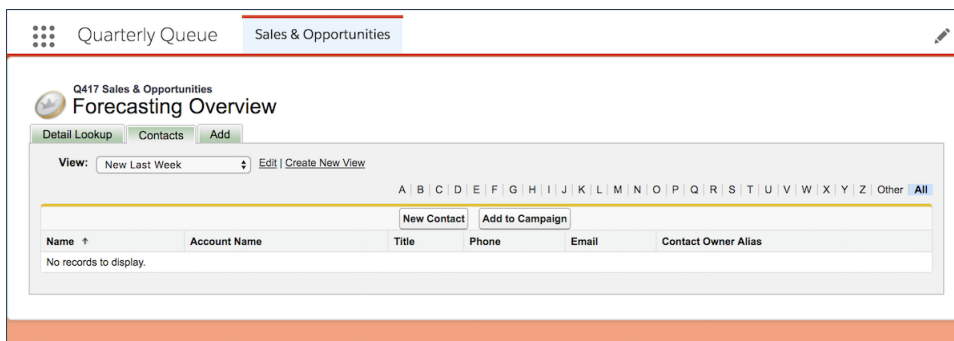
[Visualforce Developer Guide: Style Existing Visualforce Pages with Lightning Experience Stylesheets](#)

Lightning Experience Stylesheets Support Custom Theming

The `lightningStylesheets` attribute can incorporate your organization's theme in your Visualforce pages. Style your page with Salesforce's built-in themes or custom themes you create yourself.

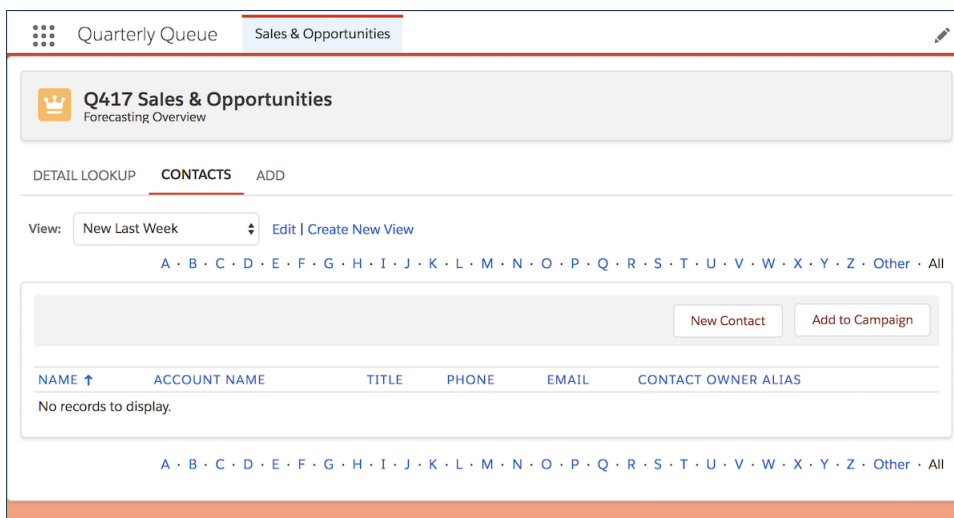
Where: This feature is available in Lightning Experience and all versions of the Salesforce app in all editions.

Why: Themes let you celebrate your org's special events and qualities. Supporting your org's theme setting in your Visualforce pages keeps the excitement consistent across your org's pages. Here's an example of a Visualforce page with standard styles, used within Lightning Experience with a custom theme.



It works, but it's just not...*you*.

With theme support added to `lightningStylesheets`, every page is dressed up for the party.



Codey Canyon red is what *everyone* is wearing this season.

How: To configure themes, from Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**.

Once you've selected an alternate theme or created a custom theme, you can use it with any Visualforce page. To do so, set `lightningStylesheets="true"` in the `<apex:page>` tag and update the page's API level to 43.0 or later.

SEE ALSO:

[Apply Lightning Experience Stylesheets to Visualforce Pages \(Generally Available\)](#)

[Visualforce Developer Guide: Style Existing Visualforce Pages with Lightning Experience Stylesheets](#)

[Salesforce Help: Brand Your Org in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Quickly Identify the Salesforce Theme That Users See in JavaScript

If you use a lot of JavaScript in your pages and apps, identifying the Salesforce user experience helps you manage navigation in your JavaScript code. Detecting the Salesforce theme used to require multiple steps and utility functions. The streamlined process involves one new function: `UITheme.getUITheme()`.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

How: `UITheme.getUITheme()` returns a string that indicates the current user's interface theme.

```
function isLightningDesktop() {
    return UITheme.getUITheme === "Theme4d";
}
```

SEE ALSO:

[Visualforce Developer Guide: Determining the Salesforce Style That Users See in JavaScript](#)

Enable Clickjack Protection for Visualforce Pages in the Salesforce Classic Console

If you disabled clickjack protection due to issues with Visualforce in the Salesforce Classic Console, including Salesforce Health Cloud, enable clickjack protection for your Visualforce pages. Previously, to use Visualforce pages in the Salesforce Classic Console, you had to disable clickjack protection for all Visualforce pages.

Where: This change applies to Salesforce Classic in all editions.

Why: No additional settings have been added to Setup, but the existing settings now provide better coverage for Salesforce Classic Console users. If you already have clickjack protection enabled, your organization automatically receives the improved security.

How: In most situations, you can simply enable clickjack protection for your Visualforce pages. From Setup, enter *Session Settings* in the Quick Find box, then select **Session Settings**. Enable the **Enable clickjack protection for customer Visualforce pages with standard headers** and **Enable clickjack protection for customer Visualforce pages with headers disabled** settings.

 **Note:** You need the "Customize Application" permission to change these settings.

However, you could have a problem if your network infrastructure includes certain proxy servers, most commonly a cloud access security broker (CASB) such as CipherCloud. If your proxy server isn't configured correctly, it can block access to Visualforce pages in the Salesforce Classic Console when clickjack protection is enabled.

If your proxy server is altering the URLs for requests to Salesforce, disable clickjack protection for Visualforce pages. Then configure your network infrastructure to correctly rewrite all URLs, including URLs in the `X-Frame-Options` HTTP header. After configuring your network infrastructure, re-enable clickjack protection for your Visualforce pages.

Apex

Apex now provides a `switch` statement, methods to help you get the developer name for record types more easily, and many other enhancements.

For more information on these enhancements, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[Simplify Your Code with the Apex Switch Statement](#)

Apex now provides a `switch` statement that tests whether an expression matches one of several values and branches accordingly.

[Get the Developer Name for Record Types More Easily](#)

We added Apex methods to help you get the developer name for record types more easily. Previously, the developer name was accessible only via SOQL on the `RecordType SObject`, and not via describe information.

[The SOQL Count\(\) Function Doesn't Count \(As Much\) Toward Limits](#)

Apex limits the total number of rows that you can retrieve with SOQL queries. We improved the way queries that contain the `SOQL COUNT()` and `COUNT(fieldName)` functions are counted toward this limit.

[Clear Messages on Visualforce Pages While Testing](#)

Use the new `System.Test.clearApexPageMessages()` method to clear the messages on a Visualforce page while executing Apex test methods.

[Compile on Deploy \(Generally Available\)](#)

Each org's Apex code is now automatically recompiled before completing a metadata deploy, package install, or package upgrade. This change in behavior improves performance following metadata deploys and package updates. Previously, a deploy, install, or upgrade could leave an org with invalidated code, causing reduced performance while Apex was recompiled.

[Opt Out of Collecting Code Coverage Information During Test Runs](#)

Speed up Apex test runs by opting out of collecting code coverage information when you want faster feedback on pass or fail status rather than coverage data. When you opt out, no data about Apex test coverage is stored.

[Use the New Apex Access Modifier for Packaging \(Beta\)](#)

Apex method accessibility within second-generation packaging (beta) has changed. Now, Apex interfaces, classes, methods, and properties aren't accessible to other packages that they share a namespace with, unless explicitly annotated. The behavior of Apex that is marked global is unchanged. The modifier applies only to packages that have a namespace.

[Apex Code Size Limit Increased](#)

The maximum amount of Apex code that you can use in an org has been doubled, from 3 MB to 6 MB. If your org was previously approved for an increase above 6 MB, it remains unchanged.

[Apex Exception Email Recipients Can Receive Process and Flow Error Emails](#)

Previously, the Apex Exception Email page was used only for Apex exceptions. Now you can also use it for process and flow error emails.

[Apex: New and Changed Classes, Enums, and Interfaces](#)

These classes, enums, and interfaces are new or have changed.

[ConnectApi \(Chatter in Apex\): New and Changed Classes and Enums](#)

Create custom experiences in Salesforce using Chatter in Apex. You can now set a feed element to closed, anonymize a comment verification, and include links to records in posts and comments.

Simplify Your Code with the Apex Switch Statement

Apex now provides a `switch` statement that tests whether an expression matches one of several values and branches accordingly.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How:

The syntax is:

```
switch on expression {
  when value1 { // when block 1
    // code block 1
  }
  when value2 { // when block 2
    // code block 2
  }
  when value3 { // when block 3
    // code block 3
  }
  when else { // when else block, optional
    // code block 4
  }
}
```

The `when` values can be single values, multiple values, or SObject types. For example:

```
when value1 {
}
```

```
when value2, value3 {
}
```

```
when TypeName VariableName {
}
```

The `switch` statement evaluates the expression and executes the code block for the matching `when` value. If no value matches, the code block for the `when else` block is executed. If there isn't a `when else` block, no action is taken.

 **Note:** There is no fall-through. After the code block is executed for a particular `when` block, the `switch` statement exits.

SEE ALSO:

[Apex Developer Guide: Switch Statements](#)

[IdeaExchange: Add "Switch" or "Case" Statement to Apex](#)

Get the Developer Name for Record Types More Easily

We added Apex methods to help you get the developer name for record types more easily. Previously, the developer name was accessible only via SOQL on the RecordType SObject, and not via describe information.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

You can use the following methods to get the developer name.

- `Schema.DescribeSObjectResult.getRecordTypeInfoByDeveloperName()`

- `Schema.RecordTypeInfo.getDeveloperName()`

SEE ALSO:

[IdeaExchange: Get RecordTypeInfo by API name method](#)

The SOQL Count() Function Doesn't Count (As Much) Toward Limits

Apex limits the total number of rows that you can retrieve with SOQL queries. We improved the way queries that contain the SOQL `COUNT()` and `COUNT(fieldName)` functions are counted toward this limit.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: Previously, each individual record matched by the SOQL `COUNT()` and `COUNT(fieldName)` functions counted toward the query row limit. So requesting a count could have a significant impact on governor limits, especially when working with many records. Now, if a query using one of these functions returns an integer, it only counts as one query row toward the governor limit. If a query using one of these functions returns an array of `AggregateResult` objects, only the total number of `AggregateResult` objects counts toward the limit.

For example, consider the following query.

```
Integer countOfContacts = [SELECT COUNT() FROM Contact WHERE Account.Name = 'Edge
Communications'];
```

Previously, the number of records matched by this query counted toward the limit. Now this query counts as only one query row toward the limit.

The following query uses the `COUNT(fieldName)` function. Previously, the number of rows returned counted toward the limit, but now this query counts as a single query row.

```
AggregateResult ar = [SELECT COUNT(AccountId) rowcount FROM Contact]; // Count contacts
with an account only
Integer rowCount = (Integer)ar.get('rowcount');
```

If a query that uses the `COUNT(fieldName)` function contains a `GROUP BY` clause, only the number of resulting `AggregateResult` objects count toward the limit. For example, in the query in the following example, only one item per aggregated result is counted toward the limit.

```
List<AggregateResult> res = [SELECT COUNT(id) FROM Contact GROUP BY AccountId];
System.assertEquals(res.size(), Limits.getQueryRows());
```

Previously, all the records matched by this query counted toward the query row limit.

SEE ALSO:

[IdeaExchange: Count the SOQL count\(\) query as a single row query](#)

Clear Messages on Visualforce Pages While Testing

Use the new `System.Test.clearApexPageMessages()` method to clear the messages on a Visualforce page while executing Apex test methods.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: You can use the `System.Test.clearApexPageMessages()` method to test the success or failure of each call to controller methods. Using this function along with the `ApexPages.hasMessages()` and `ApexPages.getMessages()` methods allows you to test Visualforce controllers more easily.

SEE ALSO:

[IdeaExchange: Add support for clearing PageMessages via Apex](#)

Compile on Deploy (Generally Available)

Each org's Apex code is now automatically recompiled before completing a metadata deploy, package install, or package upgrade. This change in behavior improves performance following metadata deploys and package updates. Previously, a deploy, install, or upgrade could leave an org with invalidated code, causing reduced performance while Apex was recompiled.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Compile on deploy is enabled automatically for production orgs to ensure that users don't experience reduced performance immediately following a deployment, and you can't disable it. For sandbox, developer, trial, and scratch orgs, this feature is disabled by default, but you can enable it in Setup, under Apex Settings.

This feature causes deployments to the org to invoke the Apex compiler and save the resulting bytecode as part of the deployment. A minimal increase in deployment times can occur, but Apex doesn't need to be recompiled on first run. So the slight increase in deployment time can prevent performance issues on first run.

Consider enabling this feature in sandboxes or scratch orgs shared by multiple users for functional testing or used by continuous integration processes.

SEE ALSO:

[IdeaExchange: Run Compile All Classes after package installation and upgrades](#)

Opt Out of Collecting Code Coverage Information During Test Runs

Speed up Apex test runs by opting out of collecting code coverage information when you want faster feedback on pass or fail status rather than coverage data. When you opt out, no data about Apex test coverage is stored.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.


How: To opt out of collecting code coverage information during test runs, do one of the following.

- From Setup, search for *Apex Test Execution*. Choose **Select Tests**, and select **Skip Code Coverage**.
- From the Developer Console, select **Test > New Run > Settings > Skip Code Coverage**.

Use the New Apex Access Modifier for Packaging (Beta)

Apex method accessibility within second-generation packaging (beta) has changed. Now, Apex interfaces, classes, methods, and properties aren't accessible to other packages that they share a namespace with, unless explicitly annotated. The behavior of Apex that is marked global is unchanged. The modifier applies only to packages that have a namespace.


Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Second-Generation Packaging is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as

is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for second-generation packaging in the [Packaging 2 Beta group](#) in the Trailblazer Community.

To enable this beta feature, which includes managed packages and unlocked packages, [enable Packaging 2](#) in your Dev Hub org.

How: The new `@namespaceAccessible` annotation marks public or protected Apex as available to other packages that share a namespace. If you use this annotation in Apex that isn't packaged, it has no impact, so it can be deployed to development orgs. Restrictions on package-level Apex visibility are currently enforced when Apex is invoked from another Apex class or trigger. However, when Apex is invoked from Visualforce or Lightning controllers, the `@namespaceAccessible` annotation on Apex classes used across packages is not enforced: the enforcement will be implemented in a future release.

 **Note:** You can add or remove the `@namespaceAccessible` annotation at any time, even on managed and released Apex code. Make sure that you don't have dependent packages relying on the functionality of the annotation before adding or removing it.

This example shows an Apex class marked with the `@namespaceAccessible` annotation. The class is accessible to other packages within the same namespace. The first constructor is also visible within the namespace, but the second constructor isn't.

```
// A namespace-visible Apex class
@namespaceAccessible
public class MyClass {
    private Boolean bypassFLS;

    // A namespace-visible constructor that only allows secure use
    @namespaceAccessible
    public MyClass() {
        bypassFLS = false;
    }

    // A package private constructor that allows use in trusted contexts,
    // but only internal to the package
    public MyClass (Boolean bypassFLS) {
        this.bypassFLS = bypassFLS;
    }
}
```

Apex Code Size Limit Increased

The maximum amount of Apex code that you can use in an org has been doubled, from 3 MB to 6 MB. If your org was previously approved for an increase above 6 MB, it remains unchanged.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[IdeaExchange: Apex usage limit 3,000,000 characters can be increased](#)

Apex Exception Email Recipients Can Receive Process and Flow Error Emails

Previously, the Apex Exception Email page was used only for Apex exceptions. Now you can also use it for process and flow error emails.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Control Who Receives Flow and Process Error Emails](#)

Apex: New and Changed Classes, Enums, and Interfaces

These classes, enums, and interfaces are new or have changed.

IN THIS SECTION:

[New Apex Classes](#)

These classes are introduced in this release.

[Changed Apex Classes](#)

These existing classes have new or changed methods or constants.

[New Apex Enums](#)

These enumerations are introduced in this release.

[Changed Apex Interface](#)

This section lists existing interfaces that have been updated.

New Apex Classes

These classes are introduced in this release.

TestBroker Class in the EventBus Namespace

The new `EventBus.TestBroker` class contains a method that delivers platform event messages in an Apex test.

deliver()

Delivers platform event messages to the test event bus. Use this method to deliver test event messages multiple times and verify that event subscribers have processed the test events each step of the way.

UserManagement Class in the System Namespace

The new `System.UserManagement` class contains methods to manage end users, for example, to register verification methods or handle requests for Salesforce to forget them.

deregisterVerificationMethod(userId, method)

Deregisters an identity verification method. Use this method to allow users to delete an existing verification method.

formatPhoneNumber(countryCode, phoneNumber)

Formats a mobile phone number for a user. Call this method to ensure that the phone number is formatted properly before updating a user's mobile phone number.

obfuscateUser(userId)

Scrambles users' data on their request when they no longer want their personal data recognized in Salesforce. When you invoke the method for the user, the data becomes anonymous, and you can never recover it.

obfuscateUser(userId, username)

Scrambles users' data on their request when they no longer want their personal data recognized in Salesforce. When you invoke the method for the user, the data becomes anonymous, and you can never recover it. Use this method to set the username to a specific value after it's scrambled.

registerVerificationMethod(method, startUrl)

Registers an identity verification method. Verification methods include a time-based one-time password, email or text one-time password, Salesforce Authenticator, or U2F. End users register their verification methods.

Changed Apex Classes

These existing classes have new or changed methods or constants.

Schema.DescribeFieldResult Class

New Method

isAiPredictionField() (Beta)

Returns a Boolean indicating whether the field is enabled to display Einstein prediction data.

New Method

isFormulaTreatNullNumberAsZero()

Returns `true` if `null` is treated as zero in a formula field, `false` otherwise.

Schema.DescribeSObjectResult Class

New Method

getRecordTypeInfoByDeveloperName()

Returns a map that matches developer names to their associated record type.

Schema.RecordTypeInfo Class

New Method

getDeveloperName()

Returns the developer name for this record type.

System.Site Class

New Method

passwordlessLogin(userId, methods, startUrl)

Logs in a user to a community using an identity verification method, such as email or text, instead of a password. Passwordless login is a convenient, mobile-friendly way to welcome users into your community. Give your community users an alternative to requiring passwords when they log in.

System.Test Class

New Method

clearApexPageMessages()

Clear the messages on a Visualforce page while executing Apex test methods.

New Method

getEventBus()

Returns an instance of the test event bus broker, which lets you operate on platform event messages in an Apex test. For example, you can call `Test.getEventBus().deliver()` to deliver event messages.

SEE ALSO:

[Show Einstein Predictions Where You Want Them \(Beta\)](#)

New Apex Enums

These enumerations are introduced in this release.

Auth.VerificationMethod Enum

This enum has the following values, which correspond to identity verification methods.

- EMAIL
- SALESFORCE_AUTHENTICATOR
- SMS
- TOTP
- U2F

System.TriggerOperation Enum

This enum has the following values, which correspond to trigger events.

- AFTER_DELETE
- AFTER_INSERT
- AFTER_UNDELETE
- AFTER_UPDATE
- BEFORE_DELETE
- BEFORE_INSERT
- BEFORE_UPDATE

SEE ALSO:

[IdeaExchange: A Trigger Context Enum to represent the current operation and before/after state](#)

Changed Apex Interface

This section lists existing interfaces that have been updated.

QuickAction.QuickActionDefaultsHandler Interface

Changed Methods

The `QuickAction.QuickActionDefaultsHandler` interface lets you specify the default values for the standard Email action in the case feed. This interface now works in Lightning Experience. For support details, see the *Apex Developer Guide*.

ConnectApi (Chatter in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Chatter in Apex. You can now set a feed element to closed, anonymize a comment verification, and include links to records in posts and comments.

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, you can 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](#)

These classes are new or have changes this release.

[New and Changed Chatter in Apex Input Classes](#)

These input classes are new or have changes this release.

[New and Changed Chatter in Apex Output Classes](#)

These output classes are new or have changes this release.

[New and Changed Chatter in Apex Enums](#)

These enums are new or have changes this release.

New and Changed Chatter in Apex Classes

These classes are new or have changes this release.

Chatter Feeds

These new and existing methods are in the `ConnectApi.ChatterFeeds` class.

Set a feed element to closed

- `setFeedElementIsClosed(communityId, feedElementId, isClosed)`

Users can't edit (specifically the feed item body or title), comment on, or delete a closed feed element. If the closed feed element is a poll, users can't vote on it. Users can't edit (specifically the comment body) or delete a comment on a closed feed element or select or remove it as best answer.

Admins and moderators can edit and delete closed feed elements and comments on closed feed elements. Admins and moderators can select or remove the best answer status on comments on closed feed elements.

Include a link to a record in a feed post

Use this existing method with the new `ConnectApi.EntityLinkSegmentInput`.

- `postFeedElement(communityId, feedElement)`

Include a link to a record in a comment

Use this existing method with the new `ConnectApi.EntityLinkSegmentInput`.

- `postCommentToFeedElement(communityId, feedElementId, comment, feedElementFileUpload)`

Mark a comment as verified by an anonymous user

If a user previously verified a comment and then requested the activity to be deleted, use this method to maintain the verification and anonymize the value of the `lastVerifiedByUser`.

- `setCommentIsVerifiedByAnonymized(communityId, commentId, isVerified, isVerifiedByAnonymized)`

Next Best Actions (Pilot)

- 📌 **Note:** We provide Einstein Next Best Action 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. Einstein Next Best Action 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 Einstein Next Best Action in the [IdeaExchange](#).

Get a proposition

- `getProposition(propositionId)`

Get recommendations for a strategy

- `getRecommendations(strategyName, maxResults, contextRecordId)`

Record user reactions to recommendations

- `setRecommendationReaction(reaction)`

Users

This existing method is in the `ConnectApi.ChatterUsers` class.

Purge likes on posts and comments for a user

- `purgeUserActivities(communityId, userId)`

New and Changed Chatter in Apex Input Classes

These input classes are new or have changes this release.

Chatter Feeds**`ConnectApi.MessageSegmentInput`**

This class is a superclass of `ConnectApi.EntityLinkSegmentInput`.

`ConnectApi.EntityLinkSegmentInput`

This new input class is a subclass of `ConnectApi.MessageSegmentInput`. It has one property.

- `entityId`—ID of the entity to link to.

Next Best Actions (Pilot)**`ConnectApi.NBARReactionInput`**

This new input class has these properties.

- `contextRecordId`—ID of the context record. For example, if the next best action is on a case detail page, the ID of the case.
- `executionId`—ID of the original recommendation strategy execution.
- `onBehalfOfId`—ID of the user or entity for which the reaction took place.
- `reactionType`—Type of reaction to a recommendation. Values are:
 - Accepted
 - Rejected
- `strategyName`—Name of the recommendation strategy.
- `targetActionId`—ID of the target action.
- `targetActionName`—Name of the target action.
- `targetId`—ID of the recommendation that is being reacted to.

New and Changed Chatter in Apex Output Classes

These output classes are new or have changes this release.

Chatter Feeds

ConnectApi.CloseCapability

This new output class is a subclass of `ConnectApi.FeedElementCapability`. It has these properties.

- `canContextUserUpdateIsClosed`—Specifies whether the context user has permission to set the feed element to closed (`true`) or not (`false`).
- `isClosed`—Specifies whether the feed element is closed (`true`) or not (`false`).

ConnectApi.FeedElementCapabilities

This output class has this new property.

- `close`—If a feed element has this capability, users with permission can close it.

ConnectApi.VerifiedCapability

This response body has this new property.

- `isVerifiedByAnonymized`—Specifies whether the comment is marked as verified by an anonymous user (`true`) or not (`false`).

Files Connect

ConnectApi.AbstractRepositoryFile

This output class has this new property.

- `contentBody`—Text of the file's content if available, otherwise `null`.

Next Best Actions (Pilot)

ConnectApi.AbstractNBARecommendation

This new output class is a superclass of `ConnectApi.NBARecommendationProposition`. It has these properties.

- `actionReference`—Reference to the action to perform, for example, to a flow to launch.
- `description`—Description of the recommendation.
- `id`—ID of the recommended entity.
- `name`—Name of the recommended entity.
- `url`—URL to the recommended entity.

ConnectApi.NBARreaction

This new output class has these properties.

- `contextRecord`—Reference to the context record.
- `createdBy`—Reference to the reaction creator.
- `createdDate`—Reaction creation date.
- `id`—Reaction record ID.
- `onBehalfOf`—Reference to the user or record that is indirectly reacting to the recommendation.
- `reactionType`—Type of reaction to a recommendation. Values are:
 - Accepted
 - Rejected

- `strategy`—Strategy that recommended the target record.
- `targetAction`—Target action that is recommended.
- `targetRecord`—Reference to the target record.

ConnectApi.NBARecommendationProposition

This new output class is a subclass of `ConnectApi.AbstractNBARecommendation`. It has no additional properties.

ConnectApi.NBARecommendations

This new output class has these properties.

- `debug`—Runtime debug information recorded during recommendation strategy execution.
- `errors`—Runtime errors that occurred during recommendation strategy execution.
- `executionId`—ID of the recommendation strategy execution.
- `onBehalfOfId`—ID of the user or entity for which the recommendation strategy was executed.
- `recommendations`—List of recommendations returned by a recommendation strategy.

ConnectApi.Proposition

This new output class has these properties.

- `actionReference`—Reference to the action to perform, for example, to a flow to launch.
- `description`—Description of the proposition.
- `id`—ID of the proposition.
- `name`—Name of the proposition.
- `url`—URL to the proposition.

ConnectApi.RecordSnapshot

This new output class has these properties.

- `id`—ID of the record.
- `nameAtSnapshot`—Name of the record when the ID was recorded.

New and Changed Chatter in Apex Enums

These enums are new or have changes this release.

For information about these enums, see `ConnectApi` Enums in *Apex Developer Guide*.

ConnectApi.FeedElementCapabilityType

This enum has one new value.

- `close`—Users can't edit, comment on, or delete closed feed elements. If the feed element is a poll, users can't vote on it.

ConnectApi.NBAReactionType

This new enum has these values.

- `Accepted`
- `Rejected`

ConnectApi.SocialNetworkProvider

This enum has one new value.

- `InstagramBusiness`

Metadata

Access more metadata types and Tooling API objects in API version 43.0. Enable users to modify metadata without giving them access to org data, too. Use custom metadata records to update shared values in multiple validation rules at once. Retrieve custom metadata type list views using Metadata API.

IN THIS SECTION:

[Determine Metadata Coverage at a Glance](#)

The Metadata Coverage report shows you whether types are supported in the Metadata API, Source Tracking, and Unlocked Packaging metadata channels. This dynamically generated report is your best source for metadata-coverage information. It shows coverage information for the latest API version that your org supports.

[Enable Access to Metadata Without Enabling Access to Data, Too \(Beta\)](#)

If a user requires access to metadata but not to data, enable the new Modify Metadata permission to give the access the user needs without providing access to org data. Users can create, edit, and delete org metadata but not org data. Users must have appropriate access rights to the metadata they're trying to modify. Modify Metadata is enabled automatically when the Deploy Change Sets permission is selected.

[Untangle Your Dependencies with MetadataComponentDependency Queries \(Pilot\)](#)

Use the new Tooling API object MetadataComponentDependency to view the dependency relationships between the metadata components in your org.

[Custom Metadata Types: Updating Multiple Validation Rules at Once, Retrieving Custom Metadata Type List Views Via Metadata API](#)

Custom metadata types continue to get better. Now you can update multiple validation rules at once, and retrieve list views via the Metadata API.

[New Change Set Components](#)

The components available for a change set vary by edition. These components are now available for change sets.

[When Change Sets Become Unavailable](#)

A change set deployed from a source sandbox that you recently deleted or refreshed can temporarily appear available for deployment in the target org. The length of time that the change set appears deployable in the target org depends on how long it takes internal database cleanup processes to complete. When you delete or refresh the source sandbox, expect that the change set is no longer available for deployment in the target org.

[Metadata API](#)

Metadata API includes new and changed types and fields.

[Tooling API](#)

Tooling API includes new and changed objects, a changed SOAP call, and a changed REST resource.

SEE ALSO:

[API](#)

Determine Metadata Coverage at a Glance

The Metadata Coverage report shows you whether types are supported in the Metadata API, Source Tracking, and Unlocked Packaging metadata channels. This dynamically generated report is your best source for metadata-coverage information. It shows coverage information for the latest API version that your org supports.


Where: To access the Metadata Coverage report, go to `https://yourOrgUrl/mdcoverage/report.jsp`.

Enable Access to Metadata Without Enabling Access to Data, Too (Beta)

If a user requires access to metadata but not to data, enable the new Modify Metadata permission to give the access the user needs without providing access to org data. Users can create, edit, and delete org metadata but not org data. Users must have appropriate access rights to the metadata they're trying to modify. Modify Metadata is enabled automatically when the Deploy Change Sets permission is selected.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions.

Some metadata types currently require the Modify All Data permission. If a user doesn't also have the Modify All Data permission, updates of these metadata types fail. The Modify Metadata permission is beta when enabled without also enabling the Modify All Data permission.


 **Note:** As a beta feature, the Modify Metadata permission is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Modify Metadata permission by posting in Collaboration or Ideas in the [Trailblazer Community](#).

Why: For example, to deploy change sets, users previously had to have both the Deploy Change Sets permission and the Modify All Data permission. Users now need only the Deploy Change Sets permission and the Modify Metadata permission to deploy a change set.

Untangle Your Dependencies with MetadataComponentDependency Queries (Pilot)

Use the new Tooling API object MetadataComponentDependency to view the dependency relationships between the metadata components in your org.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** We provide MetadataComponentDependency 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. MetadataComponentDependency 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 MetadataComponentDependency in the [Dependency API Pilot](#) group in the Trailblazer Community.

Who: If you want to query MetadataComponentDependency in scratch orgs, provide your Dev Hub's org ID when you ask to join the MetadataComponentDependency pilot. If your Dev Hub is approved for the pilot, all your scratch orgs can automatically query MetadataComponentDependency. (A Dev Hub is required only if you want to use scratch orgs.)

We especially encourage our tooling partners to apply to join the MetadataComponentDependency pilot.

Why: Many orgs are cluttered with custom objects and fields that are no longer in use. Use MetadataComponentDependency queries to determine whether your obsolete components are referenced by page layouts, formulas, and so on, so you can decide whether they're safe to delete.

Finding dependencies among components also helps you break up your metadata into packages. Working with a set of packages rather than with one monolithic org makes it easier to manage change. For example, using packages makes it easier to use a version control system and a continuous integration system.

How: Use SOQL queries to list the relationships between the metadata components in your org. The query results include one row for each relationship.

SEE ALSO:

[Tooling API: MetadataComponentDependency \(Pilot\)](#)

Custom Metadata Types: Updating Multiple Validation Rules at Once, Retrieving Custom Metadata Type List Views Via Metadata API

Custom metadata types continue to get better. Now you can update multiple validation rules at once, and retrieve list views via the Metadata API.

IN THIS SECTION:

[Update Multiple Validation Rules with Custom Metadata Type Records \(Generally Available\)](#)

With custom metadata type records available to reference in validation rules, you don't need to hard code values. Reference the records directly within the validation rules to avoid adding the same values to each rule. The ability to reference custom metadata type records helps subscriber orgs, too. Previously, when you added a validation rule to a managed package, a subscriber could not edit it. Now you can define the logic and leave customization to a subscriber.

[Retrieve Custom Metadata Type List Views Using Metadata API](#)

Retrieve custom metadata type list views using Metadata API so that when you retrieve packages, custom metadata type list views are included.

Update Multiple Validation Rules with Custom Metadata Type Records (Generally Available)

With custom metadata type records available to reference in validation rules, you don't need to hard code values. Reference the records directly within the validation rules to avoid adding the same values to each rule. The ability to reference custom metadata type records helps subscriber orgs, too. Previously, when you added a validation rule to a managed package, a subscriber could not edit it. Now you can define the logic and leave customization to a subscriber.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Professional Edition orgs can create, edit, and delete custom metadata records only from types in installed packages.

Why: Consider a validation rule that limits the discount on a brand to 10%. You decide to change the discount, so the validation rules that use this value need updating. Rather than update multiple rules that check the discount amount, reference a custom metadata record within the validation rules. Then, you can update the discount amount in the custom metadata record without modifying the validation rule.

DiscountLimits

DiscountLimits Edit Save Save & New Cancel

Information

Label Sale Discount

DiscountLimits Name Sale_Discount

maxDiscount 15

Save Save & New Cancel

Retrieve Custom Metadata Type List Views Using Metadata API

Retrieve custom metadata type list views using Metadata API so that when you retrieve packages, custom metadata type list views are included.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Professional Edition orgs can create, edit, and delete custom metadata records only from types in installed packages.

SEE ALSO:

[Metadata API Developer Guide: Custom Metadata Types](#)

New Change Set Components

The components available for a change set vary by edition. These components are now available for change sets.

Bot

Represents a definition of an Einstein Bot configuration that can have one or more versions. Only one version can be active.

BotVersion

Represents the configuration details for a specific Einstein Bot version, including dialogs, intents, entities, and slots. Both Bot and BotVersion components are selected when you add Bots to a change set.

CMSCoconnectSource

Represents the connection information for external content management systems that feed content to Communities.

MI Domain (Beta)

Represents an Einstein Intent Set.

EDITIONS

Available in **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Database.com** Editions

Snap-in Deployment

Represents a Snap-ins for Web deployment. A Snap-ins deployment is a configuration of either Snap-ins Chat or Snap-ins Appointment Management (Beta).

When Change Sets Become Unavailable

A change set deployed from a source sandbox that you recently deleted or refreshed can temporarily appear available for deployment in the target org. The length of time that the change set appears deployable in the target org depends on how long it takes internal database cleanup processes to complete. When you delete or refresh the source sandbox, expect that the change set is no longer available for deployment in the target org.

Where: This behavior applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions.

Metadata API

Metadata API includes new and changed types and fields.

New Metadata Types

Bot

Represents a definition of an Einstein Bot configuration that can have one or more versions. Only one version can be active.

BotVersion

Represents the configuration details for a specific Einstein Bot version, including dialogs, intents, entities, and slots.

CMSCoconnectSource

Represents the connection information for external content management systems that feed content to Communities.

EmbeddedServiceFieldService

Represents a setup node for creating a Snap-ins Appointment Management (beta) deployment.

FlowCategory

Represents a list of flows that are grouped by category. Flows aren't added directly to a Lightning Bolt Solution. Instead, add the category the flows are in to the Lightning Bolt Solution.

LightningBolt

Represents the definition of a Lightning Bolt Solution, which can include custom apps, flow categories, and Lightning Community templates.

MIDomain

Represents an Einstein Intent Set.

Updated Metadata Types and Fields

These metadata types have changed or have fields that have been added or changed.

AuthProvider

The following read-only fields are new.

LinkKickoffUrl

Provides the URL for linking existing Salesforce users to a third-party account.

OAuthKickoffUrl

Provides the URL for obtaining OAuth access tokens for a third party.

SsoKickoffUrl

Provides the URL for performing single sign-on into Salesforce from a third party by using its third-party credentials.

CustomApplication

The following fields are new.

isNavAutoTempTabsDisabled

Indicates whether the navigation automatically creates temporary tabs settings.

isNavPersonalizationDisabled

Indicates whether navigation personalization is disabled.

The following field has changed.

formFactors

The `Sma11` value is now supported for Lightning apps to indicate a phone using the Salesforce mobile app.

CustomField

The following field is new.

isAIPredictionField (Beta)

Checks if a field can display Einstein prediction values. Use Einstein Prediction Builder to determine the data to display and the target field.

ConnectedAppOAuthConfig

The following fields are new.

idTokenConfig

Specifies the ID token configuration for the connected app OAuth settings.

idTokenAudience

Audience that the OAuth ID token is intended for.

idTokenIncludeAttributes

Indicates whether attributes are included in the OAuth ID token.

idTokenIncludeCustomPerms

Indicates whether custom permissions are included in the OAuth ID token.

idTokenIncludeStandardClaims

Indicates whether standard claims about the authentication event are included in the OAuth ID token.

idTokenValidity

Number of minutes after which the OAuth ID token must not be accepted for processing. The default value is 2 minutes.

EmbeddedServiceBranding

The following fields are new.

Height

Height of the snap-in.

Width

Width of the snap-in.

EmbeddedServiceConfig

The following fields are new.

authMethod

Type of login method selected for this Snap-ins deployment.

customMinimizedComponent

The custom Lightning component that's used for the minimized snap-in in this Snap-ins deployment.

shouldHideAuthDialog

Indicates whether the prompt that the customer log in again during a flow should be hidden. When it's hidden, the customer is taken directly to your login page.

EmbeddedServiceLiveAgent

The following fields are new.

isOfflineCaseEnabled

Indicates whether offline support is enabled for this Snap-ins Chat deployment.

isQueuePositionEnabled

Indicates whether queue position (displaying the chat visitor's place in line while they wait for an agent) is enabled for this Snap-ins Chat deployment.

offlineCaseBackgroundImg

Offline support case form background image for this snap-in,

The `EmbeddedServiceQuickAction` field has a new field type `quickActionType`.

ExternalDataSource

The following field is new.

customHttpHeaders

Represents custom HTTP headers used with OData 2.0 or OData 4.0 connectors.

Flow

The `stages` field, which was beta in Spring '18, is now generally available.

The following fields are updated.

operator (FlowAssignmentItem subtype)

These enumeration values are added: `AddAtStart`, `AssignCount`, `RemoveAfterFirst`, `RemoveAll`, `RemoveBeforeFirst`, `RemoveFirst`, `RemovePosition`, and `RemoveUncommon`.

The `Add` operator now supports collection variables in the `value` field.

actionType (FlowActionCall subtype)

The `component` enumeration value is added.

dataType (FlowScreenField subtype)

`DateTime` is now a valid enumeration value.

ForecastingSettings

These values are added to the `name` field in `ForecastingTypeSettings`: `OpportunityQuantityProductDate`, `OpportunityQuantityScheduleDate`, `OpportunityRevenueProductDate`, and `OpportunityRevenueScheduleDate`.

InstalledPackage

The following field is new.

activateRSS

Determines the state of Remote Site Settings (RSS) and Content Security Policy (CSP) at the time of installing the package and must be set to either of these values.


true

Keep the `isActive` state of any RSS or CSP in the package.

false

Override the `isActive` state of any RSS or CSP in the package and set it to `false`.

The default value is `false`.

 **Note:** Regardless of what `activateRSS` is set to, a retrieve of `InstalledPackage` always returns `<activateRSS xsi:nil="true"/>`. Therefore, before you deploy a package, inspect the information you have retrieved from `InstalledPackage` and set `activateRSS` to the desired value.

Network

The following field is new.

lockoutTemplate

Communicates with users when they get locked out of their org because of too many failed login attempts.

ProfilePasswordPolicy

The following field is new.

forgotPasswordRedirect

Indicates whether reset password links in forgot password emails stay active until a user confirms the password reset request.

QuickAction

The `formula` field in the `FieldOverride` subtype is now supported for single-select picklist fields.

Translations

The following field is added to the `FlowTranslation` subtype.

stages

A list of stage translations for the flow version.

Updated Field Types

This field type has changed.

SharingModel

Two field values have been added.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

SEE ALSO:

[Show Einstein Predictions Where You Want Them \(Beta\)](#)

Tooling API

Tooling API includes new and changed objects, a changed SOAP call, and a changed REST resource.

The [Tooling API Developer's Guide](#) contains all Tooling API information.

IN THIS SECTION:

[Tooling API New and Changed Objects](#)

Tooling API includes new and changed objects.

[Tooling API Changed Calls and Resources](#)

Tooling API includes a changed SOAP call and a changed REST resource.

Tooling API New and Changed Objects

Tooling API includes new and changed objects.

New Objects

ColorDefinition

Represents color metadata for a tab.

EmbeddedServiceFieldService

Represents a setup node for creating a Snap-ins Appointment Management (beta) deployment.

ExternalServiceRegistration

Represents the External Service configuration for an org. Available in API version 39.0 and later.

IconDefinition

Represents an icon, such as used for a tab.

MetadataComponentDependency (Pilot)

Represents dependency relationships between the metadata components in your org.

TabDefinition

Represents a tab, and returns all tabs available in the org.

Changed Objects

ApexExecutionOverlayAction

The following field has changed.

ExecutableEntityId

This previously required field is now required only if `ExecutableEntityName` is not provided. If both `ExecutableEntityName` and `ExecutableEntityId` are provided, `ExecutableEntityId` takes precedence.

The following field is new.

ExecutableEntityName

The Apex typeRef of the class or trigger being executed. A type lookup is done and, if the typeRef is valid, `ExecutableEntityId` is set to the ID of the class or trigger.

For a trigger, the typeRef must begin with the SFDC trigger prefix `__sfdc_trigger/`. For example, `__sfdc_trigger/YourTriggerName` or `__sfdc_trigger/YourNamespace/YourTriggerName`.

For a class, use the format `YourClass, YourClass$YourInnerClass` or `YourNamespace/YourClass$YourInnerClass`.

This field is required if `ExecutableEntityId` is not provided. If both `ExecutableEntityName` and `ExecutableEntityId` are provided, `ExecutableEntityId` takes precedence.

ApexTestQueueItem

The following field is new.

ShouldSkipCodeCoverage

Indicates whether to opt out of collecting code coverage information during Apex test runs.

CustomApplication

The following fields are new.

IsNavAutoTempTabsDisabled

Indicates whether the navigation automatically creates temporary tabs settings.

IsNavPersonalizationDisabled

Indicates whether navigation personalization is disabled.

EmbeddedServiceConfig

The following fields are new.

AuthMethod

Type of login method selected for this Snap-ins deployment.

CustomMinimizedComponentId

The custom Lightning component that's used for the minimized snap-in for this Snap-ins Chat deployment.

ManageableState

Indicates the manageable state of the specified component that is contained in a package.

NamespacePrefix

The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix.

ShouldHideAuthDialog

Specifies whether the prompt that the customer login again during a flow is hidden (`true`) or not (`false`). When it's hidden, the customer is taken directly to your login page.

EmbeddedServiceLiveAgent

The following fields are new.

Enabled

Indicates whether this Snap-ins Chat Live Agent deployment is enabled (`true`).

IsOfflineCaseEnabled

Specifies whether offline support is enabled for this Snap-ins deployment (`true`) or not (`false`).

IsQueuePositionEnabled

Specifies whether queue position (displaying the customer's place in line while they wait for an agent) is enabled for this Snap-ins Chat deployment (`true`) or not (`false`).

LiveAgentChatUrl

The rest endpoint for Live Agent chats.

LiveAgentContentUrl

The rest endpoint for Live Agent content.

ManageableState

Indicates the manageable state of the specified component that is contained in a package.

NamespacePrefix

The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix.

OfflineCaseBackgroundImg

URL of the image used for the background for the offline support case form in Snap-ins Chat.

PrechatJson

JSON object of all the fields of the selected pre-chat form in Live Agent setup.

These fields were previously marked as unusable and are now available:

- AvatarImg
- FontSize
- HeaderBackgroundImg
- PrechatBackgroundImg
- SmallCompanyLogoImg
- WaitingStateBackgroundImg

EmbeddedServiceQuickAction

The following field has been added.

QuickActionType

Quick action type. One of the following values:

- `Prechat`—Pre-chat
- `OfflineCase`—Offline support (Cases)

EntityDefinition

The following field is new.

developerName

The developer name of the record type.

PackageInstallRequest

The following field is new.

EnableRss

Specifies whether the package can send and receive Remote Site Settings (RSS) and Content Security Policy (CSP) data from third-party websites (`true`) or not (`false`).

Package2

The following field is new.

IsDeprecated

Specifies whether this package has been marked as deprecated (`true`) or not (`false`).

Package2Version

The following field is new.

IsReleased

This field replaces `IsBeta`. It indicates whether the package version is released (`true`) or in beta (`false`).

The following field is removed.

IsBeta

`IsReleased` replaces this field.

Tooling API Changed Calls and Resources

Tooling API includes a changed SOAP call and a changed REST resource.

Changed SOAP Calls**runTestsAsynchronous()**

The following parameter is new.

skipCodeCoverage

This parameter indicates whether to opt out of collecting code coverage information during Apex test runs.

Changed REST Resources**/runTestsAsynchronous/**

The following parameter is new.

skipCodeCoverage

This parameter indicates whether to opt out of collecting code coverage information during Apex test runs.

API

Access more of your organization's information in API version 43.0 using simple, powerful, and secure application programming interfaces.



Note: Looking for updates for Metadata API and Tooling API? Both APIs are in the new [Metadata](#) section of these release notes.

IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[SOQL](#)

Salesforce Object Query Language (SOQL) includes updates to `toLabel(fields)`.

[SOSL](#)

Salesforce Object Search Language (SOSL) includes new support for searching through list views.

[REST API](#)

REST API includes new and changed resources.

[SOAP API](#)

SOAP API includes new, changed, and deprecated calls.

[Chatter REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. You now can set a feed element to closed, anonymize a comment verification, and include links to records in posts and comments. You can also allow unauthenticated users to see an asset file and get up to 100 asset files at a time.

[Reports and Dashboards REST API](#)

Reports and Dashboards REST API enhancements include new resources and properties. Turn on the Lightning Experience joined reports beta to start returning joined reports from `/analytics/reports`. Get information about subfolders.

[User Interface API](#)

Build Salesforce UI for native mobile apps and custom web apps using the same API that Salesforce uses to build Lightning Experience and Salesforce for Android, iOS, and mobile web. In addition to building custom user interfaces for records, actions, and favorites, now you can build user interfaces for list views and Salesforce apps.

[Bulk API](#)

Bulk API includes changes to the handling of limits and to the PK Chunking request header.

[Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs](#)

Use the `lightning:quickActionAPI` component in your custom components to interact with quick actions on the page. The component calls the Lightning Quick Action JavaScript API methods and provides similar functionality to the Salesforce Classic Publisher JavaScript APIs, also known as the Case Feed Publisher APIs. If you used the Salesforce Classic Publisher JavaScript APIs, your Visualforce components and pages now work automatically in Lightning Experience. No need to rewrite your code.

[Salesforce Console API](#)

More of the Salesforce Console Integration Toolkit JavaScript APIs are available in the Lightning Console JavaScript API. Work with the navigation item in a console app, refresh a console tab, and register an event handler for a utility. Live Agent and Omni-Channel also have new methods and events.

[\\$CustomMetadata Global Variable](#)

`$CustomMetadata` is a global variable in validation rule formulas to dynamically reference custom metadata types using the syntax `$CustomMetadata.type.record.field`.

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.

AccountBrand

Represents the brand details of a Partner Account.

AccountBrandShare

Represents a sharing entry on an account brand record.

AppDefinition

Represents the metadata of an app and its navigation items. Metadata is returned only for apps that the current user can access.

AppTabMember

Represents the list of tabs for each of the available apps.

ChannelProgramLevelShare

Represents a sharing entry on a channel program level record.

ChannelProgramMemberShare

Represents a sharing entry on a channel program member record.

ColorDefinition

Represents the color-related metadata for a custom tab.

CustomHTTPHeader

Represents a custom HTTP header that provides context information from Salesforce such as region, org details, or the role of the person viewing the external object.

EmailRelay

Represents the configuration for sending an email relay. An email relay routes email sent from Salesforce through your company's email servers.

EmailDomainFilter

Represents a filter that determines whether an email relay is restricted to a specific list of domains.

FlowStageRelation

Represents a relationship between a paused flow interview and its stages. When a flow interview is paused, Salesforce creates a FlowStageRelation record for each stage that's set to the `$Flow.CurrentStage` or `$Flow.ActiveStages` system variable. Available in API version 43.0 and later.

IconDefinition

Represents the icon-related metadata for a custom tab.

LightningToggleMetrics

Represents users who switched from Lightning Experience back to Salesforce Classic.

LightningUsageByAppTypeMetrics

Represents number of users on Lightning Experience and Salesforce Mobile.

LightningUsageByBrowserMetrics

Represents Lightning Experience usage grouped by user's browser.

LightningUsageByFlexiPageMetrics

Represents custom pages users viewed most frequently in Lightning Experience.

LightningUsageByPageMetrics

Represents standard pages users viewed most frequently in Lightning Experience.

RecordAction

Represents a relationship between a record and a flow. Create a RecordAction for every flow you want associated to a particular record.

TabDefinition

Represents a custom tab. Returns only the tabs that the current user has access to.

TransactionSecurityPolicy

Represents a transaction security policy definition.

UserDevice

Represents information unique to a device.

UserDeviceApplication

Represents information on applications installed on a device that is accessing Salesforce.

UserListView

Represents the customizations a user made to a list view.

UserListViewCriterion

Represents the criterion for a user's customized list view. The criterion consists of the filters or sort order a user added to a list view for the Salesforce Mobile app.

VoiceCoaching

Represents a call that is using call monitoring.

VoiceCoachingShare

Represents a sharing entry on a VoiceCoaching record.

VoiceLocalPresenceNumber

Represents a phone number with the same area code as the person who's being called.

Changed Objects

These objects have changed.

Changed Objects

AgentWork

This field was updated:

- `Status`

This field includes a new value, *Transferred*, which indicates that the work item was transferred from one agent to another agent, queue, or skill.

ApexTestQueueItem

This field is new:

- `ShouldSkipCodeCoverage`

Indicates whether to opt out of collecting code coverage information during Apex test runs.

AuthProvider

These read-only fields are new. The fields provide client configuration URLs that are generated after defining the authentication provider.

- `LinkKickoffUrl`
- `OauthKickoffUrl`
- `SsoKickoffUrl`

Case

This new field was added.

- `Comments`

Used to insert an internal case comment before closing a case.

CaseComment

This new field was added.

- `IsNotificationSelected`

This field indicates whether an email notification is sent to the case contact when a CaseComment is created or updated.

CaseTeamMember

This new field was added.

- `TeamTemplateId`

The ID of the predefined team with which the case team member is associated.

ChannelProgramLevel

This new field was added.

- `OwnerId`

Required. ID of the user who is the owner of the record.

ChannelProgramMember

This new field was added.

- `OwnerId`

Required. ID of the user who is the owner for the record.

ContentDocumentLink

This field was updated.

- `Visibility`

The Visibility field is now updatable.

ContentWorkspace

This new field was added.

- `WorkspaceImageId`

Used to assign image files to libraries.

Domain

This new field was added.

- `CnameTarget`

The canonical name (CNAME) of the external host or server. If you use a custom domain with a non-Salesforce provider, such as your own external server or CDN provider, to serve your domain, this field points to the CNAME of the external provider.

EmailMessage

These new fields were added.

- `IsPrivateDraft`

Loads a private email draft.

- `ValidatedFromAddress`

A picklist value with either the sender's address, validated org-wide email addresses that originated the email, or Email-to-Case Routing Address.

EmbeddedServiceDetail

These new fields were added:

- `CancelApptBookingFlowName`
- `CustomMinimizedComponent`
- `FieldServiceConfirmCardImg`
- `FieldServiceHomeImg`
- `FieldServiceLogoImg`
- `FlowDeveloperName`
- `Height`
- `IsFieldServiceEnabled`
- `IsOfflineCaseEnabled`
- `IsQueuePositionEnabled`
- `OfflineCaseBackgroundImg`
- `ShouldHideAuthDialog`
- `ShouldShowExistingAppointment`
- `ShouldShowNewAppointment`
- `Width`

These fields were previously marked as unusable and are now available:

- `AvatarImg`
- `ContrastInvertedColor`
- `FontSize`
- `HeaderBackgroundImg`
- `PrechatBackgroundImg`
- `SmallCompanyLogoImg`
- `WaitingStateBackgroundImg`

EntityDefinition

The following picklist values were added to the `InternalSharingModel` and `ExternalSharingModel` fields:

- `ControlledByLeadOrContact`
- `ControlledByCampaign`

EventLogFile

In the API event type, the `QUERY` field was removed.

The Continuation Callout Summary event type is new. See [Measure Performance of Asynchronous Callouts](#).

New fields in these event types are generally available:

- External Cross-Org Callout
- External Custom Apex Callout
- External OData Callout

In the Insecure External Assets event type, the `UNIQUE_ID` field is new.

In the Lightning Error event type, the following fields are new.

- `COMPONENT_NAME`
- `PAGE_APP_NAME`
- `PAGE_CONTEXT`
- `PAGE_ENTITY_ID`
- `PAGE_ENTITY_TYPE`
- `PAGE_URL`

In the Lightning Interaction event type, the following fields are new.

- `COMPONENT_NAME`
- `PAGE_APP_NAME`
- `PAGE_URL`
- `RECORD_TYPE`
- `RECORD_ID`
- `RELATED_LIST`

In the Lightning Page View event type, the following fields are new.

- `PAGE_APP_NAME`
- `PAGE_URL`
- `PREVPAGE_APP_NAME`
- `PREVPAGE_URL`

FeedItem

This read-only Boolean field is new: `IsClosed`. It indicates whether the feed item is open or closed to new action.

FieldHistoryArchive

The following values were added to the `FieldHistoryType` picklist field. These additions are related to Shield Platform Encryption support for work orders, work order line items, and service appointments.

- `ServiceAppointment`
- `WorkOrder`
- `WorkOrderLineItem`

FieldServiceMobileSettings

This new field was added:

- `IsUseSalesforceMobileActions`

This profile-based setting lets you display mobile and Lightning Experience actions on records in the Field Service Lightning mobile app in place of app extensions and Salesforce Classic Publisher actions. This setting is read-only until the Field Service Lightning app for iOS and Android is updated to version 5.0.

ForecastingAdjustment

This field is new: `Territory2Id`. The ID of the territory to forecast on.

ForecastingFact

This field is new: `Territory2Id`. The ID of the territory to forecast on.

ForecastingItem

This field is new: `Territory2Id`. The ID of the territory to forecast on.

ForecastingOwnerAdjustment

This field is new: `Territory2Id`. The ID of the territory to forecast on.

ForecastingType

This field is new: `DateType`.

These values are new to the `DeveloperName` field.

- `OpportunityQuantityProductDate`
- `OpportunityQuantityScheduleDate`
- `OpportunityRevenueProductDate`
- `OpportunityRevenueScheduleDate`

ForecastingQuota

This field is new: `Territory2Id`. The ID of the territory to forecast on.

ListEmail

This object now supports the search call.

ListViewChartInstance

This field is new.

- `DataQueryWithoutUserFilters`

This field contains a SOQL query that can be executed to fetch data for drawing a chart, excluding user filters.

LogoutEventStream (Beta)

The following fields are new. For more information, see [LogoutEventStream \(Beta\)](#).

- `SessionLevel`
- `SourceIp`

MaintenanceAsset

This new field was added:

- `NextSuggestedMaintenanceDate`

This field lists the suggested date of maintenance. If left blank when the maintenance asset is created, it is inherited from the related maintenance plan. Its label in the user interface is Date of the first work order in the next batch.

MaintenancePlan

These new fields were added:

- `GenerationHorizon`—(Whole number) Moves up the timing of work order batch generation.
- `DoesGenerateUponCompletion`—If selected, a new batch of work orders isn't generated until the last work order in the current batch is completed.
- `DoesAutoGenerateWorkOrders`—Turns on auto-generation of work order batches for a maintenance plan and prohibits the manual generation of work orders via the Generate Work Orders action.

Name

The following picklist values were removed from the `Type` field:

- EngagementAlertFilterAction
- EngagementAlterFilterUser
- MasterProfile
- MessageMessage
- MessagingConversation

The following picklist values were added to the Type field:

- AccountBrand
- CarePreauth
- CarePreauthItem
- ContactRequest
- CoverageBenefit
- CoverageBenefitItem
- FlowStageRelation
- FtestConcrete
- FtestConcreteNoSuperType
- IsvHammerRequest
- IsvHammerSubResult
- LandingPage
- PlanBenefit
- PlanBenefitItem
- PropositionReaction
- RecentEngagementActivity
- SetupFlowProgress
- UsageInput
- UsageFactor
- UserDevice
- UserDeviceApplication
- WaveAutoInstallRequest

NavigationMenuItem

These new fields were added:

- DraftRowID—The ID of the draft navigation menu item. The ID is unique within your organization.
- Status—Represents if the navigation menu item is published or not. The values can only be DRAFT, LIVE, or null. In API versions 42 and earlier, if the Status field is not set, the field defaults to LIVE. When queried and Status is not part of the query filter, only the NavigationMenuItem objects with a status of LIVE return. In API versions 43 and later, if the Status field is not set, the field defaults to DRAFT. When queried and Status is not part of the query filter, all NavigationMenuItem objects return regardless of status.

Network

New fields were added:

- OptionsRecognitionBadgingEnabled—Determines whether Recognition Badges are enabled.
- LockoutEmailTemplateId—ID of the email template used when a user is locked out.

Organization

The following fields were added.

- `PreferencesAutoSelectIndividualOnMerge`
- `TimeZoneSidKey`—This field identifies the default time zone of the organization.

The following picklist values were added to the `DefaultAccountAccess` field.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

The following picklist values were added to the `DefaultOpportunityAccess` field.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

The following picklist values were added to the `DefaultTerritoryOppAccess` field.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

The following picklist values were added to the `DefaultTerritoryContactAccess` field.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

The following picklist values were added to the `DefaultTerritoryCaseAccess` field.

- `ControlledByCampaign`
- `ControlledByLeadOrContact`

PartnerFundClaim

This field was updated:

- `Status`

This field is now Nillable.

PartnerFundRequest

This field was updated:

- `Status`

This field is now Nillable.

PK Chunking Header

PK chunking is supported for the `Event`, `EventRelation`, and `CaseHistory` objects.

RecordTypeInfo

This new field was added:

- `developerName`

The developer name of this record type.

TenantSecret

The following new fields were added.

- `KeyDerivationMode`—The key derivation mode applied to customer-supplied key material.
- `Source`—The source of the encryption key material.

The following picklist values were added to the `Type` field.

- `Analytics`
- `DeterministicData`

TwoFactorMethodsInfo

The following new fields were added:

- `HasUserVerifiedEmailAddress`—Indicates whether the user self-registered and verified an email address.
- `HasUserVerifiedMobileNumber`—Indicates whether the user self-registered and verified a mobile phone number.

User

This new field was added:

- `UserPreferencesUserDebugModePref`

This field corresponds to the **Debug Mode** option on the Advanced User Details page of personal settings in the user interface.

The updateable property for the `ContactId` field was changed to true.

The updateable property for the `PortalRole` field was changed to true.

UserAppInfo

This new field was added.

- `AppDefinitionId`

The ID of the last Lightning app that the user logged in to.

VerificationHistory

This field was updated:

- `Policy`

This field includes a new value, *PasswordlessLogin*, which indicates that the external user is attempting to log in to a community with a registered verification method, for example, email, SMS, Salesforce Authenticator, or TOTP.

VoiceCall

This new field was added.

- `ConferenceKey`

The conference key related to a phone call. The field's only available if call monitoring is enabled.

WorkOrder

This new field was added:

- `IsGeneratedFromMaintenancePlan`

This read-only field indicates that the work order was generated from a maintenance plan, rather than manually created.

WorkRewardFundType

The field `CurrencyCode` has two new picklist items: MRU and STN.

SOQL

Salesforce Object Query Language (SOQL) includes updates to `toLabel(fields)`.

Changed Calls

toLabel(fields)

`OldValue` and `NewValue` fields in field history objects also support `toLabel`, but only tracked changes on supported field types return translated values.

SOSL

Salesforce Object Search Language (SOSL) includes new support for searching through list views.

REST API

REST API includes new and changed resources.

IN THIS SECTION:

[New and Changed Resources](#)

New and Changed Resources

New Resources

Establish and Delete Opportunity Product Schedules

With a new REST endpoint, you can fetch opportunity product schedule data, establish a schedule on an opportunity product, or delete an opportunity product schedule.

To retrieve, establish, or delete product schedule data, send a GET, PUT, or DELETE request to this endpoint:

```
vXX.X/subjects/OpportunityLineItem/OpportunityLineItemId/OpportunityLineItemSchedules
```

Retrieve Images Directly from Rich Text Area Fields

With a new REST endpoint, you can fetch binary image data from a rich text area field for a record. Previously, when you retrieved an image with a GET request, you'd get a JavaScript redirection, which required your app to parse JavaScript. Now your Salesforce apps can load these images quickly and seamlessly. No JavaScript, no fuss—just pure binary image data.

To retrieve binary image data, send a GET request to this endpoint:

```
vXX.X/subjects/SObjectName/recordId/richTextImageFields/fieldName/contentReferenceId
```

Changed Resources

Composite Requests Can Use Collections

Composite requests, `vXX.X/composite`, now support SObject Collections resources (`vXX.X/composite/subjects`) in their subrequests.

Submit Articles for Translation in Multiple Languages

The `/knowledgeManagement/articleVersions/translations` resource has new parameters that allow you to specify multiple languages, a due date, and an assignee. You can also choose to send an email notification to the assignee.

The resource no longer blocks a submission for an existing translation, it updates the existing translation with the new information. The resource does block a submission for a translation in an inactive language.

Licensed knowledge base users with Manage Articles, Read, Create, and Edit permissions can access this resource.

New Default Format Returned for Platform Event Schema

Previously, the `eventSchema` REST API resource returned the schema of a platform event in the Apache Avro format. Starting in API version 43.0, the default format is the JSON representation of the event schema. You can also use the new `payloadFormat` parameter to choose the event schema format (JSON or Apache Avro).

The new default format correctly represents the format of platform event messages, which are sent in JSON by default. Specify the `payloadFormat` parameter to get the compact (Apache Avro) format. If you subscribe to the compact format of platform events, use the compact schema format to deserialize the events received in binary form.

You can specify the event schema format by appending the `payloadFormat` parameter to the URI with the format value.

- **EXPANDED**—The JSON representation of the event schema, which is the default format when `payloadFormat` is not specified.
- **COMPACT**—A format that adheres to the open-source Apache Avro specification for the record complex type (see [Avro Records](#) in the Apache Avro specification).

The affected URIs are:

`/v $XX.X$ /subjects/Event_Name/eventSchema`

`/v $XX.X$ /event/eventSchema/Schema_ID`

SOAP API

SOAP API includes new, changed, and deprecated calls.

New, Changed, and Deprecated Calls

New Calls

Changed Calls

search () SearchResult

The `search ()` call returns a `SearchResult` object. The `SearchResult` object was updated to include a new `searchPromoted` parameter in `SearchPromotedMetadata`, which indicates that an article was promoted in search results. Admins define promoted search terms by adding promoted terms to knowledge articles. Users who search for these keywords see the article first in search results. The related parameter `searchPromotedMetadata` was also added to `EntitySearchMetadata`.

Deprecated Calls

Chatter REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. You now can set a feed element to closed, anonymize a comment verification, and include links to records in posts and comments. You can also allow unauthenticated users to see an asset file and get up to 100 asset files at a time.

 **Note:** To create custom Chatter and communities experiences in Salesforce, use [ConnectApi \(Chatter in Apex\): New and Changed Classes and Enums](#).

IN THIS SECTION:

[New and Changed Chatter REST API Resources](#)

These resources are new or have changes this release.

[New and Changed Chatter REST API Request Bodies](#)

These request bodies are new or have changes this release.

[New and Changed Chatter REST API Response Bodies](#)

These response bodies are new or have changes this release.

New and Changed Chatter REST API Resources

These resources are new or have changes this release.

Chatter Feeds

Set a feed element to closed

Make a POST request to the new `/chatter/feed-elements/feedElementId/capabilities/close` resource with the new `isClosed` parameter set to `true` or with the new Close Capability Input.

Users can't edit (specifically the feed item body or title), comment on, or delete a closed feed element. If the closed feed element is a poll, users can't vote on it. Users can't edit (specifically the comment body) or delete a comment on a closed feed element or select or remove it as best answer.

Admins and moderators can edit and delete closed feed elements and comments on closed feed elements. Admins and moderators can select or remove the best answer status on comments on closed feed elements.

Get the closed status of a feed element

Make a GET request to the new `/chatter/feed-elements/feedElementId/capabilities/close` resource.

Include a link to a record in a post

Make a POST request to the existing `/chatter/feed-elements/` resource with the new Message Segment Input: Entity Link request body.

Include a link to a record in a comment

Make a POST request to the existing `/chatter/feed-elements/feedElementId/capabilities/comments/items` resource with the new Message Segment Input: Entity Link request body.

Mark a comment as verified by an anonymous user

If a user previously verified a comment and then requested the activity to be deleted, use this resource to maintain the verification and anonymize the value of the `lastVerifiedByUser`.

Make a PATCH request to the existing `/chatter/comments/commentId/capabilities/verified` resource with the new `isVerifiedByAnonymized` parameter set to `true` or with the updated Verified Capability Input.

Collaborative Forecasts

Get information about the context user's access to another user's forecast

Make a GET request to the new `/connect/forecasting/user-access/userId/forecastingTypeId` resource.

 **Note:** This resource replaces the `/connect/forecasting/user-access` resource.

Files

Allow unauthenticated users to see an asset file

To set visibility during asset file creation, make a POST request to the existing `/connect/files/fileId/asset` resource with the new `isVisibleByExternalUsers` parameter set to `true`.

To set visibility on an existing asset file, make a PATCH request to the existing `/connect/file-assets/assetId` resource with the new Asset File Input.

Get up to 100 asset files at a time

Make a GET request to the new `/connect/file-assets/batch/assetIds` resource, where `assetIds` is a comma-separated list of asset file IDs.

Next Best Actions (Pilot)

Get a proposition

Make a GET request to the new `/connect/propositions/propositionId` resource.

Get recommendations for a strategy

Make a GET request to the new `/connect/recommendation-strategies/strategyName/recommendations` resource.

Record user reactions to recommendations

Make a POST request to the new `/connect/recommendation-strategies/reactions` resource with the new Next Best Action Reaction Input.

Users

Purge likes on posts and comments for a user

Make a POST request to the existing `/chatter/users/userId/activities/purge-job` resource.

New and Changed Chatter REST API Request Bodies

These request bodies are new or have changes this release.

Chatter Feeds

Close Capability Input

This new request body has one property.

- `isClosed`—Specifies whether to set the feed element to closed (`true`) or not (`false`).

Message Body Input

This request body has one changed property.

- `messageSegments`—Now includes Message Segment Input: Entity Link.

Message Segment Input: Entity Link

This new request body has one property.

- `entityId`—ID of the entity to link to.

Verified Capability Input

This new request body has one property.

- `isVerifiedByAnonymized`—Specifies whether to mark the comment as verified by an anonymous user (`true`).

Files

Asset File Input

This new request body has one property.

- `isVisibleByExternalUsers`—Indicates whether unauthenticated users can see the asset file (`true`) or not (`false`).

Next Best Actions (Pilot)

Next Best Action Reaction Input

This new request body has these properties.

- `contextRecordId`—ID of the context record. For example, if the next best action is on a case detail page, the ID of the case.

- `executionId`—ID of the original recommendation strategy execution.
- `onBehalfOfId`—ID of the user or entity for which the reaction took place.
- `reactionType`—Type of reaction to a recommendation. Values are:
 - `Accepted`
 - `Rejected`
- `strategyName`—Name of the recommendation strategy.
- `targetActionId`—ID of the target action.
- `targetActionName`—Name of the target action.
- `targetId`—ID of the recommendation that is being reacted to.

New and Changed Chatter REST API Response Bodies

These response bodies are new or have changes this release.

Chatter Feeds

Close Capability

This new response body has these properties.

- `canContextUserUpdateIsClosed`—Specifies whether the context user has permission to set the feed element to closed (`true`) or not (`false`).
- `isClosed`—Specifies whether the feed element is closed (`true`) or not (`false`).

Feed Element Capabilities

This response body has this new property.

- `close`—If a feed element has this capability, users with permission can close it.

Verified Capability

This response body has this new property.

- `isVerifiedByAnonymized`—Specifies whether the comment is marked as verified by an anonymous user (`true`) or not (`false`).

Collaborative Forecasts

Forecasting User Access

This response body has these new properties.

- `forecastingTypeId`—ID of the forecast type associated with the hierarchy. Determines which hierarchy to check: user role or territory.
- `territory2Id`—ID of the territory for which we're checking access.

Data Integration

Data Integration Credit

This response body has these new properties.

- `userCreditsTotal`—The maximum number of records that a user can import.
- `userCreditsUsed`—The number of credits for importing records that a user has used during a contract period.

Files

Asset File

This response body has these new properties.

- `baseUnauthenticatedAssetUrl`—Base download URL of the asset for unauthenticated users if `isVisibleByExternalUsers` is `true`, otherwise `null`.
- `isVisibleByExternalUsers`—Indicates whether unauthenticated users can see the asset file (`true`) or not (`false`).

Files Connect

Repository File Detail

This response body has this new property.

- `contentBody`—Text of the file's content if available, otherwise `null`.

Repository File Summary

This response body has this new property.

- `contentBody`—Text of the file's content if available, otherwise `null`.

Next Best Actions (Pilot)

Next Best Action Reaction

This new response body has these properties.

- `contextRecord`—Reference to the context record.
- `createdBy`—Reference to the reaction creator.
- `createdDate`—Reaction creation date.
- `id`—Reaction record ID.
- `onBehalfOf`—Reference to the user or record that is indirectly reacting to the recommendation.
- `reactionType`—Type of reaction to a recommendation. Values are:
 - `Accepted`
 - `Rejected`
- `strategy`—Strategy that recommended the target record.
- `targetAction`—Target action that is recommended.
- `targetRecord`—Reference to the target record.

Next Best Action Recommendation

This new response body has these properties.

- `actionReference`—Reference to the action to perform, for example, to a flow to launch.
- `description`—Description of the recommendation.
- `id`—ID of the recommended entity.
- `name`—Name of the recommended entity.
- `url`—URL to the recommended entity.

Next Best Action Recommendations

This new response body has these properties.

- `debug`—Runtime debug information recorded during recommendation strategy execution.
- `errors`—Runtime errors that occurred during recommendation strategy execution.

- `executionId`—ID of the recommendation strategy execution.
- `onBehalfOfId`—ID of the user or entity for which the recommendation strategy was executed.
- `recommendations`—List of recommendations returned by a recommendation strategy.

Proposition

This new response body has these properties.

- `actionReference`—Reference to the action to perform, for example, to a flow to launch.
- `description`—Description of the proposition.
- `id`—ID of the proposition.
- `name`—Name of the proposition.
- `url`—URL to the proposition.

Record Snapshot

This new response body has these properties.

- `id`—ID of the record.
- `nameAtSnapshot`—Name of the record when the ID was recorded.

Reports and Dashboards REST API

Reports and Dashboards REST API enhancements include new resources and properties. Turn on the Lightning Experience joined reports beta to start returning joined reports from `/analytics/reports`. Get information about subfolders.

For more information, see the [Reports and Dashboards REST API Developer Guide](#).

New Resource: `folders/<folderid>/children`

The `folders/<folderid>/children` REST API resource returns information about the subfolders of a specified folder.

Resource URI	Supported HTTP Methods	Description
<code>/services/data/v43.0/folders/<folderid>/children</code>	GET	Returns information about the subfolders of a specified folder, including IDs, labels, folder type, and URLs.

New Methods: GET `folders`

The `folders` REST API supports a new method, `GET`, that allows you to get information about report and dashboard folders and subfolders.

Resource URI	Supported HTTP Method	Description
<code>/services/data/v43.0/folders</code>	GET	Gets information about report and dashboard folders and subfolders.

Changed Resources: `/analytics/reports`, `/analytics/dashboards`, and `folders`

The reports resource now returns joined reports as part of the Lightning Experience joined reports beta. A new property describes custom links from dashboard components. Changed properties help make way for the Lightning Experience joined report beta.


Reports

If your org turns on the Lightning Experience joined report beta, then the `/analytics/reports` resource now returns joined reports in addition to all other report formats. Previously, it only returned tabular, summary, and matrix reports. For more information about the Lightning Experience joined report beta, including how to opt in, see [Joined Reports Arrive in Lightning Experience \(Beta\)](#) in Salesforce release notes.

A report is a joined report when `reportFormat` is `MULTI_BLOCK`.

As you get ready to work with joined reports in the REST API, take note of these beta limitations and known issues.

- If you make a `POST` or `PATCH` request on a joined report to edit the report, only some properties can be edited:
 - `hasDetailRows`
 - `hasRecordCount`
 - `showSubtotals`
 - `showGrandTotal`
- If you make a `POST` or `PATCH` request on a joined report and try to change `reportFormat` then you get a success code but `reportFormat` isn't updated.
- You can't change `reportFormat` to `MULTI_BLOCK`.

 **Note:** As a beta feature, Lightning Experience joined reports is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

The `/analytics/reports/report_ID/describe` resource has new properties.

Property	Type	Description
<code>dateGranularityInfos</code>	<code>dateGranularityInfos[]</code>	<p>An array of objects each of which specifies a measure of time used to group date fields (day, week, month, fiscal quarter, and more). Each object has these properties:</p> <ul style="list-style-type: none"> • <code>label</code> — The name of the time measure as it appears in the application. • <code>value</code> — API name of the time measure.

The `analytics/reports/report_ID/describe` resource has changed properties.

Property	Type	Description
reportFormat	String	A new value is available for <code>reportFormat</code> as part of the Lightning Experience joined reports beta. The new value is <code>MULTI_BLOCK</code> , which specifies that a report is a joined report. The <code>MULTI_BLOCK</code> property of <code>reportFormat</code> is beta in API version 43.0.

Dashboards

The `/analytics/dashboards/dashboard_ID/describe` resource has new properties.

Property	Type	Description
drillURL	String	Specifies a custom link destination from a dashboard component. If <code>drillURL</code> begins with <code>https://</code> or <code>http://</code> or <code>www.</code> , then the link directs to a website outside of Salesforce. Otherwise, the destination is a site inside Salesforce. Null if no link is set.
flexTableType	String	Specifies whether the table shows detail columns or groups and measures. Possible values are: <ul style="list-style-type: none"> <code>tabular</code> — The table displays detail rows. <code>summary</code> — The table displays groups and measures.

The `/analytics/dashboards/dashboard_ID/describe` resource has changed properties.

Property	Type	Description
displayUnits	String	New values are available for <code>displayUnits</code> , which specifies how to display numbers in dashboard components. Each value displays numbers as a multiple of a hundred (<code>hundreds</code>), thousand (<code>thousands</code>), million (<code>millions</code>), billion (<code>billions</code>), or trillion (<code>trillions</code>).

Folders

The `folders` REST API resource has a new property.

Property	Type	Description
parentId	String	Specifies the ID of the parent folder. The value is null for a root folder.

The `folders/<folderid>` REST API resource has the following new properties.

Property	Type	Description
ancestry	List<FolderSummaryRepresentation>	This folder's ancestor folders, ordered by depth.
childrenUrl	ConnectUri	Subfolders of the specified folder.
url	ConnectUri	URL of the folder /services/data/v43.0/folders/<folderid>/children
depth	Integer	Depth of the folder in the tree. A folder with depth 0 is a root folder.

User Interface API

Build Salesforce UI for native mobile apps and custom web apps using the same API that Salesforce uses to build Lightning Experience and Salesforce for Android, iOS, and mobile web. In addition to building custom user interfaces for records, actions, and favorites, now you can build user interfaces for list views and Salesforce apps.

IN THIS SECTION:

[Build UI for List Views](#)

User Interface API has new resources that make it easy to get record data and metadata about list views displayed in the Salesforce UI. Use these resources to build UI for list views.

[Build UI for Most Recently Used List Views](#)

User Interface API has new resources that make it easy to get record data and metadata about an object's most recently used (MRU) list views. Use these resources to build UI for MRU list views.

[Build UI for Apps](#)

User Interface API has new resources that make it easy to get record data and metadata about apps in the Salesforce UI. Use these resources to retrieve metadata for a specific app or all apps for a user.

[Other User Interface API Changes](#)

We also made some small but significant changes to User Interface API.

Build UI for List Views

User Interface API has new resources that make it easy to get record data and metadata about list views displayed in the Salesforce UI. Use these resources to build UI for list views.

New List View Resources

Use this resource to get a collection of list views associated with an object:

- `/ui-api/list-ui/{objectApiName}`

Get the List Views Associated with an Object

For example, to retrieve all list views associated with accounts, make this request.

```
/services/data/v43.0/ui-api/list-ui/Account
```

The request returns a list of all list views for the given object.

```
{
  "count" : 6,
```

```

    "currentPageToken" : "0",
    "currentPageUrl" :
"/services/data/v43.0/ui-api/list-ui/Account?pageSize=20&pageToken=0",
    "eTag" : "d33d58077e8560bcaec18bdc2647c642",
    "lists" : [ {
      "apiName" : "AllAccounts",
      "id" : "00BRM000002KPM42AO",
      "label" : "All Accounts",
      "listUiUrl" : "/services/data/v43.0/ui-api/list-ui/Account/AllAccounts"
    }, {
      "apiName" : "MyAccounts",
      "id" : "00BRM000002KPM2A4",
      "label" : "My Accounts",
      "listUiUrl" : "/services/data/v43.0/ui-api/list-ui/Account/MyAccounts"
    }, {
      "apiName" : "NewLastWeek",
      "id" : "00BRM000002KPMj2AO",
      "label" : "New Last Week",
      "listUiUrl" : "/services/data/v43.0/ui-api/list-ui/Account/NewLastWeek"
    }, {
      "apiName" : "NewThisWeek",
      "id" : "00BRM000002KPMQ2A4",
      "label" : "New This Week",
      "listUiUrl" : "/services/data/v43.0/ui-api/list-ui/Account/NewThisWeek"
    }, {
      "apiName" : "PlatinumandGoldSLACustomers",
      "id" : "00BRM000002KPMg2AO",
      "label" : "Platinum and Gold SLA Customers",
      "listUiUrl" :
"/services/data/v43.0/ui-api/list-ui/Account/PlatinumandGoldSLACustomers"
    }, {
      "apiName" : "RecentlyViewedAccounts",
      "id" : "00BRM000002KPM22AO",
      "label" : "Recently Viewed Accounts",
      "listUiUrl" : "/services/data/v43.0/ui-api/list-ui/Account/RecentlyViewedAccounts"
    } ],
    "nextPageToken" : null,
    "nextPageUrl" : null,
    "previousPageToken" : null,
    "previousPageUrl" : null
  }

```

Modify the List View Results

To modify the results returned by the List View resources, use the following request parameters:

- `pageSize`—The number of list records viewed at one time.
- `pageToken`—A token that represents the page offset.
- `q`—Keywords used to query your lists.
- `recentListsOnly`—Show only recently viewed lists.

For example, to show only recently viewed lists, set the `recentListsOnly` parameter to `true`.

```
GET /services/data/v43.0/ui-api/list-ui/Account?recentListsOnly=True
```

Build UI for Most Recently Used List Views

User Interface API has new resources that make it easy to get record data and metadata about an object's most recently used (MRU) list views. Use these resources to build UI for MRU list views.

Introducing MRU List View Resources

Use these resources to get record data and metadata for an object's MRU list view:

- `/ui-api/mru-list-records/{objectApiName}` —Get the record data for an object's MRU list view.
- `/ui-api/mru-list-info/{objectApiName}` —Get the metadata for an object's MRU list view.
- `/ui-api/mru-list-ui/{objectApiName}` —Get the record data and metadata for an object's MRU list view.

Get the Metadata for an MRU List View

For example, to get information about the record data and metadata for the most recently used account list views, make this request.

```
/services/data/v43.0/ui-api/mru-list-info/Account
```

The request returns the record data and metadata for the most recently used account list view.

```
{
  "eTag" : "70eb4acb889c6dc5954f2e4ad25f428c",
  "info" : {
    "cloneable" : false,
    "createable" : true,
    "deletable" : false,
    "displayColumns" : [ {
      "fieldApiName" : "Name",
      "label" : "Account Name",
      "sortable" : true
    }, {
      "fieldApiName" : "Site",
      "label" : "Account Site",
      "sortable" : true
    }, {
      "fieldApiName" : "Phone",
      "label" : "Phone",
      "sortable" : true
    }, {
      "fieldApiName" : "Owner.Alias",
      "label" : "Account Owner Alias",
      "sortable" : true
    } ],
    "eTag" : "c4f11fa9015eeb2387d301daeabb8b43",
    "filterLogicString" : null,
    "filteredByInfo" : [ ],
    "label" : "Recently Viewed",
    "listReference" : {
      "id" : null,
      "listViewApiName" : null,
      "objectApiName" : "Account",
      "type" : "mru"
    },
    "orderByInfo" : [ ],
    "updateable" : false,
    "userPreferences" : {
```

```

    "columnWidths" : {
      "Site" : -1,
      "Owner.Alias" : -1,
      "Phone" : -1,
      "Name" : -1
    },
    "columnWrap" : {
      "Site" : false,
      "Owner.Alias" : false,
      "Phone" : false,
      "Name" : false
    }
  },
  "visibility" : "Public",
  "visibilityEditable" : false
},
"records" : {
  "count" : 6,
  "currentPageToken" : "0",
  "currentPageUrl" :
"/services/data/v43.0/ui-api/mru-list-records/Account?pageSize=50&pageToken=0",
  "listInfoETag" : "c4f11fa9015eeb2387d301daeabb8b43",
  "nextPageToken" : null,
  "nextPageUrl" : null,
  "previousPageToken" : null,
  "previousPageUrl" : null,
  "records" : [ {
    "apiName" : "Account",
    "childRelationships" : { },
    "eTag" : "e4475909d999e4c05a79afcf25b74947",
    "fields" : {
      "CreatedDate" : {
        "displayValue" : null,
        "value" : "2018-04-11T00:37:56.000Z"
      },
      "Id" : {
        "displayValue" : null,
        "value" : "001RM000003UNu0YAG"
      },
      "LastModifiedDate" : {
        "displayValue" : null,
        "value" : "2018-04-11T00:37:56.000Z"
      },
      "Name" : {
        "displayValue" : null,
        "value" : "Grand Hotels & Resorts Ltd"
      },
      "Owner" : {
        "displayValue" : null,
        "value" : {
          "apiName" : "User",
          "childRelationships" : { },
          "eTag" : "671bc4877d13cd4f43d28a671636f873",
          "fields" : {

```

```

        "Alias" : {
            "displayValue" : null,
            "value" : "AUser"
        },
        "Id" : {
            "displayValue" : null,
            "value" : "005RM000001cNuJYAU"
        }
    },
    "id" : "005RM000001cNuJYAU",
    "recordTypeInfo" : null
}
},
"OwnerId" : {
    "displayValue" : null,
    "value" : "005RM000001cNuJYAU"
},
"Phone" : {
    "displayValue" : null,
    "value" : "(312) 596-1000"
},
"Site" : {
    "displayValue" : null,
    "value" : null
},
"SystemModstamp" : {
    "displayValue" : null,
    "value" : "2018-04-11T00:37:56.000Z"
}
},
"id" : "001RM000003UNu0YAG",
"recordTypeInfo" : null
}, {
... Additional records removed for brevity ...
} ]
}
}

```

Modify the List View Results

To modify the results returned by the List View resources, use the following request parameters:

- `fields`—Extra fields queried for the records returned, for display purposes. If a field is specified and the user doesn't have access to it, an error occurs.
- `optionalFields`—Extra fields queried for the records returned, for display purposes. If a field is specified and the user doesn't have access to it, no error occurs.
- `pageSize`—The number of list records viewed at one time.
- `pageToken`—A token that represents the page offset.
- `sortBy`—The API name of the field the list view is sorted by.

For example, to sort records by the date they were created, set the `sortBy` parameter to `CreatedDate`.

```
GET /services/data/v43.0/ui-api/mru-list-ui/Account?sortBy=CreatedDate
```

Build UI for Apps

User Interface API has new resources that make it easy to get record data and metadata about apps in the Salesforce UI. Use these resources to retrieve metadata for a specific app or all apps for a user.

Introducing Apps Resources

Use these resources to get record data and metadata for an app:

- `/ui-api/apps` —Get metadata for all the apps a user has access to.
- `/ui-api/apps/{appId}` —Get the metadata for an object's MRU list view.
- `/ui-api/apps/{appId}` —Saves an app as the last selected for a user, and returns metadata for the app.
- `/ui-api/apps/selected` —Retrieves the app that the current user last selected or the app the user sees by default.
- `/ui-api/apps/{appId}/user-nav-items` —Get a user's personalized navigation items.

Get the Metadata for All the Apps That the User Has Access To

Let's say that the user has an app with an ID of `06mRM000000AFIrYAO`. To get metadata for this app, make this request.

```
GET /services/data/v43.0/ui-api/apps/06mRM000000AFIrYAO?formFactor=Large
```

The request returns metadata for the app and its associated navigation items.

```
{
  "appId": "06mRM000000AFIrYAO",
  "description": "Manage customer service with accounts, contacts, cases, and more",
  "developerName": "Service",
  "formFactors": ["Large"],
  "headerColor": "#0070D2",
  "iconUrl": "https://yourInstance.salesforce.com/logos/Salesforce/ServiceCloud/icon.png",

  "isNavAutoTempTabsDisabled" : false,
  "isNavPersonalizationDisabled" : false,
  "label": "Service",
  "logoUrl": "https://yourInstance.salesforce.com/logos/Salesforce/ServiceCloud/logo.png",

  "mobileStartUrl": null,
  "navItems": [{
    "availableInClassic": true,
    "availableInLightning": true,
    "color": "EF7EAD",
    "content": "home__desktopDefault",
    "custom": false,
    "developerName": "standard-home",
    "iconUrl": "https://yourInstance.salesforce.com/img/icon/t4v35/standard/home_120.png",

    "id": null,
    "itemType": "Standard",
    "label": "Home",
    "objectApiName": "Home",
    "pageReference": {
      "attributes": {
        "pageName": "home"
      },
    },
    "state": {},
    "type": "standard__namedPage"
  }
}
```

```

    },
    "standardType": "Home"
  }, {
    "availableInClassic": false,
    "availableInLightning": true,
    "color": "489DD0",
    "content": null,
    "custom": false,
    "developerName": "standard-Feed",
    "iconUrl": "https://yourInstance.salesforce.com/img/icon/t4v35/standard/feed_120.png",

    "id": null,
    "itemType": "Standard",
    "label": "Chatter",
    "objectApiName": "Feed",
    "pageReference": {
      "attributes": {
        "pageName": "chatter"
      },
      "state": {},
      "type": "standard__namedPage"
    },
    "standardType": "Feed"
  }
],
"selected": true,
"startUrl": "https://yourInstance.salesforce.com/home/home.jsp?tsid=02uRM000000AFIr",
"uiType": "Classic",
"userNavItems": []
}

```

Other User Interface API Changes

We also made some small but significant changes to User Interface API.

PATCH Requests Support `If-Modified-Since`

When you make a PATCH request to update a record, make sure the record hasn't changed since the user started editing it. To find out whether it's safe to save a record, pass the `If-Modified-Since` HTTP header in the request.

This change applies to all API versions.

Attempting to Create or Update a Read-Only Field Throws an Error

As of API version 43.0, if you pass read-only fields in a request body in a PATCH or POST request, the server returns an Error with Output response body, which contains information about the error.

Decide Whether to Save Duplicate Records

The Record Input request body has a new `allowSaveOnDuplicate` property, which specifies whether to save a duplicate record. The default value is `false`. Use the Record Input request body with these resources:

- Update a record: PATCH `/ui-api/records/{recordId}`
- Create a record: POST `/ui-api/records`

New Field Data Type

The Field response body `dataType` property has a new value, `ComboBox`.

Communities User Access

Users with a Customer Community or Partner Community [User License](#) can access User Interface API.

Bulk API

Bulk API includes changes to the handling of limits and to the PK Chunking request header.

The Bulk API now enforces the limits on the batch sizes returned from query results. This change only affects jobs where the `contentType` field in the `JobInfo` resource is set `XML`.

The PK Chunking request header now supports the `Event`, `EventRelation`, and `CaseHistory` objects.



Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs

Use the `lightning:quickActionAPI` component in your custom components to interact with quick actions on the page. The component calls the Lightning Quick Action JavaScript API methods and provides similar functionality to the Salesforce Classic Publisher JavaScript APIs, also known as the Case Feed Publisher APIs. If you used the Salesforce Classic Publisher JavaScript APIs, your Visualforce components and pages now work automatically in Lightning Experience. No need to rewrite your code.

Where: This change applies to Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: There are a few differences between the Salesforce Classic Publisher JavaScript APIs and the new Lightning Quick Action JavaScript APIs.

Different How?	Salesforce Classic Publisher JavaScript APIs	Lightning Quick Action JavaScript APIs
Implementation	<p>To implement, load the publisher script in your Visualforce page or component. For example:</p> <pre><script type='text/javascript' src='/canvas/sdk/js/43.0/publisher.js' /></pre> <p>Then you can reference the Publisher APIs through the <code>Sfdc.canvas.publisher</code> object. For example:</p> <pre>Sfdc.canvas.publisher.selectAction({...})</pre>	<p>To implement, use the component <code>lightning:quickActionAPI</code> in your custom Lightning component. For example:</p> <pre><aura:component implements="flexipage:availableForRecordHome" description="My lightning component"> <lightning:quickActionAPI aura:id="quickActionAPI"/> </aura:component></pre> <p>Then you can reference the Quick Action APIs in your controller code.</p>
Supported actions, pages, and apps	Works with any quick action on a record page in Salesforce Classic apps for objects that are feed-enabled.	Works with any quick action on a record page in any Lightning Experience app.
Available methods	<p>Provides the following methods:</p> <ul style="list-style-type: none"> <code>publisher.selectAction</code> <code>publisher.setActionInputValues</code> <code>publisher.invokeAction</code> <code>publisher.customActionMessage</code> 	<p>Provides the following methods:</p> <ul style="list-style-type: none"> <code>selectAction</code> <code>getSelectedActions</code> <code>setActionFieldValues</code> <code>invokeAction</code> <code>getCustomAction</code> <code>refresh</code>

Different How?	Salesforce Classic Publisher JavaScript APIs	Lightning Quick Action JavaScript APIs
Lightning Experience and Salesforce Classic support	<p>Works in Salesforce Classic and Lightning Experience.</p> <p> Tip: Starting with API version 43.0 of the Salesforce Classic JavaScript Publisher API, the methods used in Visualforce components and pages work in Lightning Experience. Just point to the latest version of the Publisher API script in your Visualforce pages.</p> <pre data-bbox="435 541 930 682"><script src="/canvas/sdk/js/43.0/publisher.js" type="text/javascript"> </script></pre> <p> Note: The <code>portalPostFields</code> input value is not supported in Lightning Experience.</p>	<p>Works only in Lightning Experience.</p> <p>Here are a few considerations for working with the Lightning Quick Action APIs.</p> <ul style="list-style-type: none"> • Don't use the APIs with the following items: <ul style="list-style-type: none"> – Opportunity products – Knowledge articles – Crew Size field on the Service Crew object – Social quick action in the case feed publisher provided with Social Customer Service • The <code>lightning:quickActionAPI</code> component doesn't work in communities. • To work with quick actions created with the Custom Visualforce or Lightning Component action type, use the <code>getCustomAction</code> method.

SEE ALSO:

[Publisher and Quick Action API Developer Guide](#)

Salesforce Console API

More of the Salesforce Console Integration Toolkit JavaScript APIs are available in the Lightning Console JavaScript API. Work with the navigation item in a console app, refresh a console tab, and register an event handler for a utility. Live Agent and Omni-Channel also have new methods and events.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: The following methods are new or have changed in API version 43.0.

Navigation Items

focusNavigationItem()

Focuses on the selected navigation object, and opens the object's home page. Typically, standard and custom objects open the object's list view. If split view is open, the focus remains on the selected navigation object.

getNavigationItems()

Returns information about all items in the item menu.

getSelectedNavigationItem()

Returns information about the selected navigation item.

refreshNavigationItem()

Refreshes the selected navigation object's home page. Typically, standard and custom objects open the object's list view. If split view is open, it's refreshed.

Workspace Tabs and Subtabs

refreshTab ()

Refreshes a workspace tab or a subtab specified by `tabId`. Keep in mind that the first subtab has the same `tabId` as the workspace tab.

disableTabClose ()

Prevents a workspace tab or subtab from closing. This method removes the close button from a tab or subtab, and disables the keyboard shortcuts that close tabs and subtabs.

setTabHighlighted ()

A new argument draws attention to a tab with an animation.

openTab ()

Added support for the new Lightning URL format in the URL argument.

openSubtab ()

Added support for the new Lightning URL format in the URL argument.

Utilities

onUtilityClick ()

Registers an event handler for the utility. The event handler is called when the utility is clicked.

Live Agent

endChat ()

Ends a chat that an agent is engaged in.

getChatLog ()

Returns the log of a chat associated with a specific chat key.

sendCustomEvent ()

Sends a custom event to the client-side chat window for a chat with a specific chat key.

sendMessage ()

Sends a new chat message from the agent to a chat with a specific chat key.

Omni-Channel

acceptAgentWork ()

Accepts a work item that's assigned to an agent.

closeAgentWork ()

Changes the status of a work item to "Closed" and removes it from the list of work items in the Omni-Channel utility.

declineAgentWork ()

Declines a work item that's assigned to an agent.

getAgentWorkload ()

Retrieves an agent's currently assigned workload. Use this method for rerouting work to available agents.

getAgentWorks ()

Returns a list of work items that are currently assigned to an agent and open in the agent's workspace.

getServicePresenceStatusChannels ()

Retrieves the service channels that are associated with an Omni-Channel user's current presence status.

getServicePresenceStatusId()

Retrieves an agent's current presence status.

login()

Logs an agent in to Omni-Channel with a specific presence status. You also can use this method to reconnect to Omni-Channel after a connection error.

logout()

Logs an agent out of Omni-Channel.

setServicePresenceStatus()

Sets an agent's presence status to a status with a particular ID. If the specified agent is not already logged in, we log in the agent with the presence status. This method removes the need for you to make more calls. You also can use this method to reconnect to Omni-Channel after a connection error.

SEE ALSO:

[Salesforce Console Developer Guide \(can be outdated or unavailable during release preview\)](#)

[Salesforce Classic Console API Methods Supported in the Lightning Console API \(can be outdated or unavailable during release preview\)](#)

\$CustomMetadata Global Variable

`$CustomMetadata` is a global variable in validation rule formulas to dynamically reference custom metadata types using the syntax `$CustomMetadata.type.record.field`.

Debugging: Two New Debuggers, Updated Debug Log Formatting and Limits, and Logging Changes for Flows and Processes

ISV Customer Debugger is available in Visual Studio Code, and we added Apex Replay Debugger, which simulates a debugging session using debug logs. We made some subtle but important changes to debug log lines. You can now store larger logs, but we added some limits to protect everyone from service degradation. Logging for flows and processes is now more robust.

IN THIS SECTION:

[Banish Bugs with Two New Debuggers in Visual Studio Code](#)

Use Apex Replay Debugger, which simulates a debugging session using debug logs, to root out problems in all your orgs. ISV Customer Debugger, formerly available only in Force.com IDE, is now available in VS Code.

[Parse Debug Logs More Effectively with Updated Log Lines](#)

We made a few changes to the format and content of debug log lines. We also fixed the way that `SYSTEM_CONSTRUCTOR_ENTRY` events are logged.

[Store Larger Debug Logs with Changed Log Limits](#)

We increased the size limit for debug logs from 2 MB per log to 5 MB. You can store up to 250 MB of debug logs at a time. System logs are now deleted automatically after 24 hours instead of after seven days. Monitoring logs are still saved for seven days.

[Troubleshoot Flows and Processes with New Log Lines](#)

To help you better troubleshoot issues with governor limits and bulkification in flows and processes, we added four new debug log lines.

Banish Bugs with Two New Debuggers in Visual Studio Code

Use Apex Replay Debugger, which simulates a debugging session using debug logs, to root out problems in all your orgs. ISV Customer Debugger, formerly available only in Force.com IDE, is now available in VS Code.

For details, see [Debug All Your Orgs for Free with Apex Replay Debugger \(Beta\)](#) and [Debug Subscriber Sandboxes in VS Code](#).

Parse Debug Logs More Effectively with Updated Log Lines

We made a few changes to the format and content of debug log lines. We also fixed the way that `SYSTEM_CONSTRUCTOR_ENTRY` events are logged.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: While we were aware that many of you have built tools for parsing debug logs, we hadn't dabbled much in log-parsing ourselves. That all changed when we started building the Apex Replay Debugger. When drinking our own champagne, we realized that we could be using higher-quality grapes.

We'll continue to monitor debug logs for inconsistencies and make improvements as needed based on your feedback and our experiences.

How: If you parse debug logs, update your tools to account for these changes.

- `SYSTEM_CONSTRUCTOR_ENTRY` events are no longer incorrectly logged as `CONSTRUCTOR_ENTRY` events.
- TypeRefs are appended to the end of some log lines. For details about typeRefs and their formats, see the `ExecutableEntityName` field on [ApexExecutionOverlayAction](#) in *Tooling API*.
 - TypeRefs for Apex triggers are appended to the end of the log entries for `CODE_UNIT_STARTED` and `CODE_UNIT_FINISHED` events. Trigger typeRefs include the prefix `__sfdc_trigger/`.

Old log line: 17:30:42.4

```
(4577278) |CODE_UNIT_STARTED| [EXTERNAL] |01qxxxxxxxxxxxxx|YourTrigger on Account
trigger event BeforeInsert
```

New log line: 17:30:42.4

```
(4577278) |CODE_UNIT_STARTED| [EXTERNAL] |01qxxxxxxxxxxxxx|YourTrigger on Account
trigger event BeforeInsert|__sfdc_trigger/YourTrigger
```

- TypeRefs for Visualforce controllers are appended to the end of the log entries for `VF_APEX_CALL_START` and `VF_APEX_CALL_END` events.

Old log line: 17:30:42.4

```
(4683272) |VF_APEX_CALL_START| [EXTERNAL] |01pxxxxxxxxxxxxx|YourApexClass
invoke(yourApexMethod)
```

New log line: 17:30:42.4

```
(4683272) |VF_APEX_CALL_START| [EXTERNAL] |01pxxxxxxxxxxxxx|YourApexClass
invoke(yourApexMethod) |YourApexClass
```

- TypeRefs for Apex classes or inner classes are appended to the end of the log entries for `CONSTRUCTOR_ENTRY` and `CONSTRUCTOR_EXIT` events.

Old log line: 17:30:42.4 (33834629) |CONSTRUCTOR_ENTRY| [5] |01pxxxxxxxxxxxxx|<init>(String)

New log line: 17:30:42.4

```
(33834629) |CONSTRUCTOR_ENTRY| [5] |01pxxxxxxxxxxxxx|<init>(String) |YourClass.YourInnerClass
```

- In `VARIABLE_SCOPE_BEGIN` and `VARIABLE_ASSIGNMENT` events, static variables include a namespace, if applicable.

Old log line: 18:17:19.3 (6298966) |VARIABLE_ASSIGNMENT|[2]|yourString|"Hello World!"

New log line: 18:17:19.3 (6298966) |VARIABLE_ASSIGNMENT|[2]|YourNamespace.yourString|"Hello World!"

- CODE_UNIT_STARTED and CODE_UNIT_FINISHED events show parentheses in an Apex method's signature. These events also include a namespace, if applicable.

Old log line: 18:23:34.3

(3142744) |CODE_UNIT_STARTED|[EXTERNAL]|01pxxxxxxxxxxxxx|YourApexClass.yourApexMethod

New log line: 18:23:34.3

(3142744) |CODE_UNIT_STARTED|[EXTERNAL]|01pxxxxxxxxxxxxx|YourNamespace.YourApexClass.yourApexMethod()

- METHOD_ENTRY and METHOD_EXIT include a namespace, if applicable.

Old log line: 18:25:41.3

(4276813) |METHOD_ENTRY|[2]|01pxxxxxxxxxxxxx|YourApexClass.yourApexMethod

New log line: 18:25:41.3

(4276813) |METHOD_ENTRY|[2]|01pxxxxxxxxxxxxx|YourNamespace.YourApexClass.yourApexMethod()

- WF_RULE_EVAL_VALUE events display `true` or `false` instead of 0 or 1.
- Previously, if an error occurred when a flow interview started, the error was logged in `FLOW_START_INTERVIEWS_END`. These errors are now logged in `FLOW_START_INTERVIEWS_ERROR`.

Store Larger Debug Logs with Changed Log Limits

We increased the size limit for debug logs from 2 MB per log to 5 MB. You can store up to 250 MB of debug logs at a time. System logs are now deleted automatically after 24 hours instead of after seven days. Monitoring logs are still saved for seven days.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: When we analyzed debug log generation and usage, we found that most logs wouldn't be truncated with a 5-MB size limit. We also found that most orgs don't store more than 250 MB of logs at a time. These new limits protect everyone from service degradation while ensuring that most orgs can log all the events and store all the logs you could want.

How: When your org accumulates more than 250 MB of debug logs, we prevent users in the org from adding or editing trace flags. To add or edit trace flags so that you can generate more logs after you reach the limit, delete some debug logs. To delete debug logs, from Setup, in the Quick Find box, enter *Debug Logs*, and then select **Debug Logs > Delete**.

If you want to keep a system log longer than 24 hours, you can save it to your local workstation.

Troubleshoot Flows and Processes with New Log Lines

To help you better troubleshoot issues with governor limits and bulkification in flows and processes, we added four new debug log lines.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When you use debug logs to troubleshoot issues with a flow or process, keep your eye out for these events.

Event	Description	Level
FLOW_BULK_ELEMENT_LIMIT_USAGE	Identifies usage against per-transaction governor limits by the element executed in bulk.	FINER and above
FLOW_BULK_ELEMENT_NOT_SUPPORTED	Identifies when an element couldn't be bulkified because the associated object doesn't support bulk operations.	INFO and above
FLOW_ELEMENT_LIMIT_USAGE	Identifies usage against per-transaction governor limits by the flow element.	FINER and above
FLOW_START_INTERVIEW_LIMIT_USAGE	Identifies usage against per-transaction governor limits when starting the flow interview and before executing flow elements.	FINER and above

SEE ALSO:

[Monitor Process and Flow Usage Against Per-Transaction Governor Limits](#)

[Make Sure That Flow and Process Bulk Operations Are Supported](#)

[Parse Debug Logs More Effectively with Updated Log Lines](#)

[Salesforce Help: Set Up Debug Logging](#)

[Salesforce Help: Debug Log Levels \(can be outdated or unavailable during release preview\)](#)

Salesforce Extensions for VS Code: Two New Debuggers

In addition to the enhancements we've made in weekly releases, Salesforce Extensions for VS Code v43 includes two major enhancements: ISV Customer Debugger (formerly available only in Force.com IDE) and Apex Replay Debugger. These features are available when Salesforce Extensions for VS Code v43 is released on June 9, 2018.

For information about getting started with Salesforce Extensions for VS Code, see the [salesforcedx-vscode documentation](#) in the Visual Studio Code Marketplace.

For information about enhancements made in weekly releases, see the Salesforce Extensions for VS Code [change log](#).

IN THIS SECTION:

[Debug All Your Orgs for Free with Apex Replay Debugger \(Beta\)](#)

Apex Replay Debugger simulates a live debugging session using a debug log, which is a recording of all interactions in a transaction. You no longer need to parse through thousands of log lines manually. Instead, Apex Replay Debugger presents the logged information similarly to an interactive debugger, so you can debug your Apex code.

[Debug Subscriber Sandboxes in VS Code](#)

The ISV Customer Debugger covers a gap in what you can do with the Apex Debugger. As an ISV, you can debug your own code. As a subscriber, you can debug your own code. However, because of the protections against seeing managed code, subscribers can't debug ISV code in their orgs. With the ISV Customer Debugger, an ISV can work with a subscriber to debug issues specific to the subscriber's org.


[Force.com IDE 2 Beta Discontinued](#)

As we announced on February 14, 2018, the Force.com IDE 2 beta release has been discontinued. We recommend that you use Salesforce Extensions for VS Code instead. The classic version of Force.com IDE is still available.

Debug All Your Orgs for Free with Apex Replay Debugger (Beta)

Apex Replay Debugger simulates a live debugging session using a debug log, which is a recording of all interactions in a transaction. You no longer need to parse through thousands of log lines manually. Instead, Apex Replay Debugger presents the logged information similarly to an interactive debugger, so you can debug your Apex code.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

 **Note:** As a beta feature, Apex Replay Debugger is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Apex Replay Debugger in the [Issues section](#) of the [salesforcedx-vscode](#) repository on GitHub.

When: Apex Replay Debugger is available when Salesforce Extensions for VS Code v43 is released on June 9, 2018.

Who: To view, retain, and delete debug logs, you need the View All Data user permission.

Why: Apex Debugger, our interactive debugger, debugs only sandboxes and scratch orgs. But you can use Apex Replay Debugger in any org that you have source code and a debug log for, including your production org. Apex Replay Debugger is not only free, it's open source!

How: For information on getting started with Apex Replay Debugger, see the [salesforcedx-vscode-apex-replay-debugger documentation](#) in the Visual Studio Code Marketplace.

Debug Subscriber Sandboxes in VS Code

The ISV Customer Debugger covers a gap in what you can do with the Apex Debugger. As an ISV, you can debug your own code. As a subscriber, you can debug your own code. However, because of the protections against seeing managed code, subscribers can't debug ISV code in their orgs. With the ISV Customer Debugger, an ISV can work with a subscriber to debug issues specific to the subscriber's org.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

When: ISV Customer Debugger is available in Visual Studio Code when Salesforce Extensions for VS Code v43 is released on June 9, 2018.

Who: Each License Management Org (LMO) has one free ISV Customer Debugger session. To purchase more sessions, or to purchase Apex Debugger sessions so that you can debug your own sandboxes and scratch orgs, contact Salesforce.

Why: An ISV can reproduce issues in the specific environment, so problems can be diagnosed more quickly.

How: You can debug only sandbox orgs. For information on getting started with ISV Customer Debugger, see the "ISV Customer Debugger" section of the [salesforcedx-vscode-apex-debugger documentation](#) in the Visual Studio Code Marketplace.

Force.com IDE 2 Beta Discontinued

As we announced on February 14, 2018, the Force.com IDE 2 beta release has been discontinued. We recommend that you use Salesforce Extensions for VS Code instead. The classic version of Force.com IDE is still available.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Group, Professional, Enterprise, and Developer editions.

When: We are not providing future releases of this tool, and no downloads are available after May 3, 2018. You cannot access the *Force.com IDE 2 Developer Guide* as of April 23, 2018.

Why: After evaluating customer feedback and our roadmap for upcoming releases, pivoting to Salesforce Extensions for VS Code is more aligned with our long-term plans. These plans prioritize creating open tooling through open standards, such as the Language Server Protocol and Debug Adapter Protocol. Using open standards lets us deliver powerful features to customers more quickly.

We decided that it wasn't practical to build two editors at the same time. By building a single editor, we can focus on providing the best possible experience for our customers and partners. In addition, Salesforce Extensions for VS Code is open source, and we welcome pull requests from the community.

We want to thank everyone who tried out the Force.com IDE 2 beta and gave us valuable feedback. We hope you enjoy using Visual Studio Code.

How: To download Salesforce Extensions for VS Code, visit the [Visual Studio Code Marketplace](#).

SEE ALSO:

[Salesforce Spring '18 Release Notes: Force.com IDE 2 Beta Discontinued](#)

[Salesforce Developers Blog: All About Salesforce Extensions for VS Code](#)

Salesforce CLI: Plug-In Development Support, Streamlined Packaging Commands, and Enhanced Debug Logging

Use the Salesforce command-line interface (CLI) to easily create environments for development and testing, synchronize source code, run tests, and control the full application life cycle. These new and changed features are available when Salesforce CLI v43 is released on June 9, 2018.

We release changes to the Salesforce CLI regularly. Read the weekly release notes to learn about recent updates for [version 43 of the CLI](#) or in the [previous version \(42\)](#).

These commands and parameters have changed in version 43 or during version 42 weekly updates. For more information, see [version 43 of the Salesforce CLI Command Reference](#).

New Commands

plugins:generate

Use the Salesforce Plugin Generator to build plug-ins for the Salesforce CLI. The generated `sfdx` plug-in and command are built on top of the [oclif cli framework](#). See <https://github.com/forcedotcom/sfdx-plugin-generate> for more information.

force:apex:log:get

Use this command to fetch the specified debug log or given number of most recent logs from your default scratch org.

force:apex:log:tail

Use this command to turn on debug logging and output logs in the terminal. You can also pipe debug logs to a file.

Changed Commands

force:package Commands Replace **force:package2** Commands

We are streamlining all second-generation packaging commands and adding several new parameters that make creating packages easier and more intuitive. You can continue to use the `force:package2` commands until they are deprecated in Winter '19. The `force:package1` commands, which you use to create first-generation package versions, are unchanged.

See [Create and Manage Packages More Easily \(Beta\)](#) for details.

force:source Commands

Source status tracking is now available for Lightning Experience themes.

New Parameters

force:package:install -r | --noprompt

This parameter allows Remote Site Settings and Content Security Policy websites to send or receive data without confirmation.

Changed Parameters

force:apex:test:run -c | --codecoverage

To improve performance, we calculate and retrieve code coverage results for `force:apex:test:run` only when you supply the `-c | --codecoverage` flag.

sfdx force:apex:test:run --resultsformat human

The output now includes a new section: `=== Failures`. This section includes stack traces for failed tests. In [Salesforce Extensions for VS Code](#), these stack traces are active links to lines of your code.

force:package2:version:create --buildinstance

We removed this parameter because it is for internal use only and was unintentionally exposed.

Installation and Configuration Changes

v6 Linux Tarballs' Root Directories Are Versioned

The new v6 Linux installer tarballs' root directories are versioned and change with every release. To keep the directory name consistent (especially important for CI use cases):

1. Get one of these tarballs:

```
wget https://developer.salesforce.com/media/salesforce-cli/sfdx-linux-amd64.tar.xz
```

```
wget https://developer.salesforce.com/media/salesforce-cli/sfdx-linux-386.tar.xz
```

2. Create an `sfdx` folder:

```
mkdir sfdx
```

3. Extract the files for your tarball version:

```
tar xJf sfdx-linux-amd64.tar.xz -C sfdx --strip-components
```

```
tar xJf sfdx-linux-386.tar.xz -C sfdx --strip-components 1
```

4. Run `./sfdx/install`.

Windows 10 Subsystem for Linux

We no longer support installing the Salesforce CLI on the Windows 10 Subsystem for Linux. The Salesforce CLI works best within the native Windows command prompt (`cmd.exe`) and the Microsoft Powershell.

Windows Installer Updates

When you install the Salesforce CLI on Windows, we no longer install Git. Salesforce CLI no longer depends on Git.

Salesforce Plugin Generator (Beta)

We released the Salesforce Plugin Generator (Beta) that you can use to build plug-ins for the Salesforce CLI. The generated sfdx plug-in and command are built on top of the Open CLI Framework. See [Salesforce Plugin Generator](#) for more information.

Plug-in Development Support

To support plug-in development, we added a plugins section to the `sfdx-project.json` file. In this section, add configuration values and settings for your plug-in.

```
"plugins": {
  "yourPluginName": {
    "timeOutValue": "2"
  }
}
```

Here's an example of the code you use to access the properties:

```
import { Project, SfdxProjectJson } from '@salesforce/core'

const project: Project = await Project.resolve(process.cwd());
const sfdxProject: SfdxProjectJson = await project.retrieveSfdxProjectJson();
const pluginSettings: any = sfdxProject.get('plugins');
this.ux.log('timeOutValue: ${pluginSettings.yourPluginName.timeOutValue}');
```

Improved Connection Types for Generated Plug-ins

For existing generated plug-ins, if you decide to update to the latest `@salesforce/command` library, update your `tsconfig.json` file.

1. Run this command in your generated plug-in:

```
yarn add --dev @types/jsforce
```

2. Remove these lines from `tsconfig.json`:

```
"baseUrl": "./",
"paths" : {
  "*" : ["/node_modules/@salesforce/core/typings/*"]
}
```

Scratch Orgs: New Features Available

We're offering some new features for scratch orgs.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Developer, Enterprise, Group, and Professional editions.

Who: You can create scratch orgs if you turned on Developer Hub in your production org or signed up for a Dev Hub trial org.

Why: Salesforce DX supports these features in scratch orgs.

- `CascadeDelete`—Deletes the child records of lookup relationships when you delete the parent.
- `ContactsToMultipleAccounts`—Tracks the relationships between a customer and the businesses that they work with by relating a single contact record to multiple accounts.
- `StateAndCountryPicklist`—State and country picklists let users select states and countries from predefined, standardized lists instead of entering state and country data into text fields. State and country picklists offer faster and easier data entry.

How: Add the feature to the scratch org definition file.

```
"features": ["CascadeDelete", "StateAndCountryPicklist"],
```

Work with Health Cloud Managed Packages in Scratch Orgs

By default, we have provisioned Enterprise and Developer edition scratch orgs with 10 Health Cloud permission set licenses. These licenses let you install and work with Health Cloud managed packages.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise and Developer edition scratch orgs.

Enterprise Messaging: Apex Testing Enhancements for Platform Events, High-Volume Platform Events (Pilot), and Change Data Capture (Pilot)

Use events to simplify communication between business systems. This release includes Apex test support for flow and process event subscribers and on-demand test event delivery. Deliver millions of events efficiently with High-Volume Platform Events. Replicate Salesforce records to your external systems with Change Data Capture.

IN THIS SECTION:

[Test Process and Flow Event Subscribers in Apex](#)

You can now automate testing of process and flow event subscribers in Apex with API version 43.0 and later. Write Apex tests to ensure that your flow and process that are subscribed to a platform event are working as expected. When a platform event message is published in an Apex test, it fires all subscribers, including processes and flows. For Apex tests saved in API version 42.0 and earlier, process and flow event subscribers are not triggered and can't be tested.

[Deliver Test Events on Demand](#)

Use `Test.getEventBus().deliver()` to deliver test events in an Apex test. You no longer have to rely only on `Test.stopTest()` for event delivery at the end of a test. You can now deliver test events multiple times within a test and verify that subscribers have processed the test events each step of the way.

[Access Subscriber Information in an Apex Test](#)

You can now obtain subscriber state information in an Apex test by using `EventBusSubscriber`. `EventBusSubscriber` has two new fields, `LastError` and `Retries`, which contain information about retried Apex triggers—triggers that have thrown `EventBus.RetryableException`.

[Get Notified When an Apex Trigger Is Suspended for Too Many Retries](#)

When an Apex trigger that is subscribed to a platform event exceeds the maximum number of retries, it stops processing new event messages. It then moves to the error state. You are emailed a notification so that you can fix the trigger and resume processing new event messages.

[Get the Number of Milliseconds in Platform Event DateTime Fields](#)

`DateTime` fields, such as `CreatedDate`, now include the millisecond part of the time in the serialized JSON event message that's delivered to CometD clients. This change makes the `DateTime` field format consistent with the `DateTime` format in other Salesforce APIs.

[Scale Your Event-Based Apps with High-Volume Platform Events \(Pilot\)](#)

Use high-volume platform events to publish and process millions of events efficiently. This pilot was offered last release, and we've made enhancements for this release.

[Keep Your External Data Up to Date with Change Data Capture \(Pilot\)](#)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes data change events, which represent changes to Salesforce records. Changes include creating a record, updating a record, deleting a record, and undeleting a record. The Data Change Capture pilot was offered last release. This release includes some enhancements.

Test Process and Flow Event Subscribers in Apex

You can now automate testing of process and flow event subscribers in Apex with API version 43.0 and later. Write Apex tests to ensure that your flow and process that are subscribed to a platform event are working as expected. When a platform event message is published in an Apex test, it fires all subscribers, including processes and flows. For Apex tests saved in API version 42.0 and earlier, process and flow event subscribers are not triggered and can't be tested.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions.

Deliver Test Events on Demand

Use `Test.getEventBus().deliver()` to deliver test events in an Apex test. You no longer have to rely only on `Test.stopTest()` for event delivery at the end of a test. You can now deliver test events multiple times within a test and verify that subscribers have processed the test events each step of the way.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions.

Why: Delivering event messages multiple times is useful for testing sequential processing of events. For example, you can verify sequential actions of a subscriber in a loop within the same test.

How: Enclose `Test.getEventBus().deliver()` within the `Test.startTest()` and `Test.stopTest()` statement block.

```
Test.startTest();
// Create test events
// ...
// Publish test events with EventBus.publish()
// ...
// Deliver test events
Test.getEventBus().deliver();
// Perform validation
// ...
Test.stopTest();
```

Access Subscriber Information in an Apex Test

You can now obtain subscriber state information in an Apex test by using `EventBusSubscriber`. `EventBusSubscriber` has two new fields, `LastError` and `Retries`, which contain information about retried Apex triggers—triggers that have thrown `EventBus.RetryableException`.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions.

Why: Previously, subscriber information was available through `EventBusSubscriber` only for non-test code. And retried trigger information was available only in triggers through the `EventBus.TriggerContext.currentContext().retries` and `EventBus.TriggerContext.currentContext().lastError` properties.

How: The following SOQL query gets information about all trigger subscribers to the Order_Event__e event.

```
SELECT Name, Position, Retries, LastError
FROM EventBusSubscriber
WHERE Topic='Order_Event__e' AND Type='ApexTrigger'
```

Get Notified When an Apex Trigger Is Suspended for Too Many Retries

When an Apex trigger that is subscribed to a platform event exceeds the maximum number of retries, it stops processing new event messages. It then moves to the error state. You are emailed a notification so that you can fix the trigger and resume processing new event messages.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions.

How: The email notification is sent to the developer specified in the Last Modified By field on the trigger. The email is sent to more recipients that you specify in the Apex Exception Email page in Setup. To avoid exceeding the maximum number of retry attempts, check the number of retries in the trigger using `EventBus.TriggerContext.currentContext().retries` or by querying the `EventBusSubscriber.retries` field.

Get the Number of Milliseconds in Platform Event DateTime Fields

DateTime fields, such as `CreatedDate`, now include the millisecond part of the time in the serialized JSON event message that's delivered to CometD clients. This change makes the DateTime field format consistent with the DateTime format in other Salesforce APIs.

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions.

How: The string representation of DateTime fields follows the ISO 8601 standard and is in the following format.

```
YYYY-MM-DDTHH:mm:ss.sssZ
```


The new DateTime format applies to subscribed clients using API version 43.0 and later. Previously, serialized DateTime fields didn't preserve the millisecond part and were in the following format.

```
YYYY-MM-DDTHH:mm:ssZ
```

 **Note:** For event messages delivered to Apex triggers, DateTime fields don't include millisecond precision, like DateTime fields of Salesforce objects.

Scale Your Event-Based Apps with High-Volume Platform Events (Pilot)

Use high-volume platform events to publish and process millions of events efficiently. This pilot was offered last release, and we've made enhancements for this release.

 **Note:** We provide High-Volume Platform Events 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. High-Volume Platform Events 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 High-Volume Platform Events in this [Trailblazer Community group](#).

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, and Enterprise editions. This change is provided in sandbox only.

Why: Choose the platform event type that suits your business needs. For applications that receive several million events per day, use high-volume platform events through the pilot program. For applications that receive up to a million events per day, use standard-volume platform events.

How: You can define a high-volume platform event from the user interface or through Metadata API. From the UI, in Setup, enter *Platform Events* in the Quick Find box, then select **Platform Events**. When completing the standard fields, select **High Volume** for Event Type.

In Metadata API, the event definition is represented in the CustomObject type with `eventType` set to `HighVolume`.

Publish and subscribe to high-volume platform events in the same way that you publish and subscribe to standard-volume platform events. You can use declarative tools, such as Process Builder and flow, or write code with Apex and CometD API apps.

In this release, we made these enhancements.

Asynchronous Publishing


For efficient processing of high loads of incoming event messages, high-volume platform events are published asynchronously. After the publishing call returns with a successful result, the publish request is queued in Salesforce. The event message might not be published immediately. In contrast, standard-volume events are published immediately and synchronously.

Separate Event Allocations

High-volume platform events have higher event allocations than standard-volume platform events. The allocations include event notifications published per hour and event notifications delivered to CometD clients within a 24-hour period.


Event Retention

High-volume platform event messages are stored for up to three days. You can retrieve past event messages when using CometD clients to subscribe to a channel.

 **Note:** Subscribers on the Lightning Platform (non-CometD clients including Apex triggers, processes, and flows) don't count against the 24-hour CometD event delivery limit. The number of event messages that an Apex trigger, process, or flow can process depends on how long the processing takes for each subscriber. The longer the processing time, the longer it takes for the subscriber to reach the tip of the event stream.

Keep Your External Data Up to Date with Change Data Capture (Pilot)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes data change events, which represent changes to Salesforce records. Changes include creating a record, updating a record, deleting a record, and undeleting a record. The Data Change Capture pilot was offered last release. This release includes some enhancements.

 **Note:** We provide Change Data Capture 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. Change Data Capture 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 Change Data Capture in this [Trailblazer Community group](#).

Where: This change applies to Lightning Experience and Salesforce Classic in Performance, Unlimited, Enterprise, and Developer editions. This change is provided only in sandbox.

How: For example, you have a human resource (HR) system with copies of employee custom object records from Salesforce. You can synchronize the employee records in the HR system by receiving data change events from Salesforce. After receiving the events, you can process the corresponding insert, update, delete, or undelete operations in the HR system. Because the changes are received in near real time, the data in your HR system stays up to date.

For this release, we made these enhancements.

Support for New Standard Objects

In addition to standard objects previously supported, Data Change Capture now supports these standard objects.

- AccountContactRole
- OpportunityContactRole
- User

Custom Object Default Enablement

All custom objects are now automatically enabled for data change events. Previously, you had to enable each custom object individually.

Field-Level Security

Change Data Capture respects the field-level security settings that are set up in your org. Delivered events contain only the fields that a subscribed user is allowed to view. To subscribe to change events, a user must have the View All Data permission, but field-level security settings restrict the fields a user has access to. Before delivering a change event for an object, the subscribed user's field permissions are checked. If a subscribed user has no access to a field, the field isn't included in the data change event message that the subscriber receives.

Shield Platform Encryption

Change Data Capture is supported when Shield Platform Encryption is enabled. If Salesforce record fields are encrypted with Shield Platform Encryption, changes in encrypted field values generate change events. Data in change event messages is delivered over a secure transport layer (HTTPS and TLS).

Classic Encryption is not supported with Change Data Capture.

Packaging: Not Just for Partners Anymore

A package encapsulates all the changes that you're tracking between life-cycle stages in a versioned, distributable artifact. You can create first-generation and second-generation packages.

IN THIS SECTION:

[Create and Manage Packages More Easily \(Beta\)](#)

Second-Generation Packaging makes an evolutionary leap in Summer '18 with streamlined commands. It's now also easier to configure and manage your Salesforce DX projects. To improve the usability of packaging commands, we are introducing aliases, which are easier to remember than cryptic packaging IDs.

[Remove Components from Non-Namespaced Unlocked Packages \(Beta\)](#)

You can remove components from non-namespaced unlocked packages even after you install the package.

[Enhanced Validation Prevents Removing Active Records when Uninstalling Packages](#)

When you uninstall a package containing account record types, a validation process prevents you from removing all active business and person account record types. Previously, this validation occurred only when removing an account record type from the Record Type Setup page.


[Locked Packages Pilot Is Suspended](#)

After careful consideration, we have decided to suspend the pilot for locked packages and to stop supporting them in Summer '18. The Salesforce CLI package commands no longer include the option to create a locked package.

Create and Manage Packages More Easily (Beta)

Second-Generation Packaging makes an evolutionary leap in Summer '18 with streamlined commands. It's now also easier to configure and manage your Salesforce DX projects. To improve the usability of packaging commands, we are introducing aliases, which are easier to remember than cryptic packaging IDs.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app. Dev Hub is available in Enterprise, Performance, and Unlimited editions. Scratch orgs are available in Developer, Enterprise, Group, and Professional editions.

 **Note:** As a beta feature, Second-Generation Packaging is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for second-generation packaging in the [Packaging 2 Beta](#) group in the Trailblazer Community.

When: We update the Salesforce CLI v43 weekly. For the latest features, changes, and fixes, see the [Salesforce CLI v43 Release Notes](#).

Why: You can now use names or strings instead of IDs in `sfdx-project.json` and when running packaging CLI commands. But if you're comfortable using packaging IDs and prefer to not use aliases, you can use `force:package` commands with IDs as input. `force:package2` commands will be removed from the Salesforce CLI in Winter '19.

We have no plans to change the `force:package1` commands. Continue to use them to create first-generation package versions.

Salesforce CLI Packaging Command Changes

To see Salesforce CLI command and parameter descriptions, view the command-line `--help` or the [Salesforce CLI Command Reference](#).

Deprecated Command (v43 or Earlier)	New Command (v43)	Removed Parameters	New or Changed Parameters
<code>force:package2:create</code>	<code>force:package:create</code>	<code>--containeroptions</code> <code>-o</code>	<code>--packagetype</code> <code>-t</code> (flag is required) <code>--path</code> <code>-r</code> (flag is required)
<code>force:package2:list</code>	<code>force:package:list</code>	N/A	N/A
<code>force:package2:update</code>	<code>force:package:update</code>	<code>--package2id</code> <code>-i</code>	<code>--package</code> <code>-p</code> (alias or package ID)
<code>force:package2:version:create</code>	<code>force:package:version:create</code>	<code>--package2id</code> <code>-i</code>	<code>--definitionfile</code> <code>-f</code> <code>--package</code> <code>-p</code> (alias or package ID) <code>--versiondescription</code> <code>-e</code> <code>--versionname</code> <code>-a</code> <code>--versionnumber</code> <code>-n</code> <code>--installationkey</code> (flag is now required)

Deprecated Command (v43 or Earlier)	New Command (v43)	Removed Parameters	New or Changed Parameters
			--installationkeybypass -x
force:package2:version:create:get	force:package:version:create:report	N/A	N/A
force:package2:version:create:list	force:package:version:create:list	N/A	N/A
force:package2:version:get	force:package:version:report	--package2versionid -i	--package -p (alias or package ID)
force:package2:version:list	force:package:version:list	--package2ids -i	--packages -p (can list multiple packages)
force:package2:version:update	force:package:version:promote	--noprompt -p --setasreleased	N/A
force:package2:version:update	force:package:version:update	--description -d --name -n --package2versionid -i	--package -p (alias or package ID) --versiondescription -e --versionname -a
force:package:install:get	force:package:install:report	N/A	N/A
force:package:uninstall:get	force:package:uninstall:report	N/A	N/A

Salesforce CLI Parameter Changes

For these commands, only the parameters have changed.

Command Name	Changed or Removed Parameters	New Parameters
force:package:install	--id -i (no longer required) Short flag (-p) for --publishwait is deprecated	--package (no short flag)
force:package:uninstall	--id -i (no longer required)	--package -p

Salesforce DX Project Changes

We improved how you set up and maintain your Salesforce DX project, but you can use your current `sfdx-project.json` file until Winter '19.

Package Aliases

If you're an existing customer or partner who creates packages, you're familiar with the many types of 15-character and 18-character packaging IDs. These IDs uniquely identify your package and package versions, but they aren't intuitive. You can now use user-friendly

aliases for packaging IDs in your Salesforce DX project file and when running CLI packaging commands. The `sfdx-project.json` includes a section for creating package aliases.

```
"packageAliases": {
  "Time Off Manager": "0HoB00000004CFpKAM",
  "External Apex Library@1.0.0-4": "04tB0000000IB1EIAW",
  "Expense Manager": "0HoB00000004CFuKAM"
}
```

Use package version aliases when indicating package dependencies.


To specify dependencies for 2GP within the same Dev Hub, use either the package version alias or a combination of the package name and the version number.

```
"dependencies": [
  {
    "package": "MyPackageName@0.1.0.1"
  }
]
```

```
"dependencies": [
  { "package": "MyPackageName",
    "versionNumber": "0.1.0.LATEST"
  }
]
```

To specify dependencies for 2GP outside of the current Dev Hub and for first-generation packages within or outside of the current Dev Hub, use:

```
"dependencies": [
  {
    "package": "OtherOrgPackage@1.2.0"
  }
]
```

 **Note:** You can use the LATEST keyword for the version number to set the dependency.

To denote dependencies with package IDs instead of package aliases, use:

- The `0Ho` ID if you specify the package ID along with the version number
- The `04t` ID if you specify only the package ID

Let's say you want to update the description for the Expense Manager package. You can identify it by its alias—Expense Manager—rather than its non-intuitive package ID.

```
sfdx force:package:update --package "Expense Manager" \
  --description "Summer '18 Release"
```

Automatic Updates to the Salesforce DX Project File

Say good-bye to manual updates. The Salesforce CLI maps the `0Ho` or `04t` IDs to the package names or aliases when creating packages or package versions, and automatically updates the Salesforce DX project file. You can also add or update your package aliases and IDs by modifying the `packageAliases` section of `sfdx-project.json` manually.

When you run the command with a package name, the CLI creates the alias in the `packageAliases` section and updates the `packageDirectories` section. You can reference the package by its alias in subsequent commands. Aliases make your `sfdx-project.json` file more readable. You need not run another command to retrieve cryptic IDs.

```
sfdx force:package:create --name "Revenue Optimizer" \
  --path "util" --packagetype Unlocked
```

```
"packageDirectories": [
  {
    "path": "util",
    "package": "Revenue Optimizer",
    "versionName": "ver 0.1",
    "versionNumber": "0.1.0.NEXT",
    "default": false
  }
],
"packageAliases": {
  "Revenue Optimizer": "0HoB00000004CUqKAM"
}
```

The CLI also creates an alias when you create a package version. The alias for the package version consists of the package name and version number. To run the command in non-asynchronous mode, specify a wait time when creating the package version.

```
sfdx force:package:version:create --package "Revenue Optimizer" \
  --versionnumber 1.0.0.2 --wait 10
```

If the package version is created within the wait time, the `sfdx-project.json` file is automatically updated. If not, you must manually update the project file.

```
"packageAliases": {
  "Revenue Optimizer@1.0.0-2": "04tB0000000IB1EIAW"
}
```


What If I Don't Want My Salesforce DX Project Automatically Updated?

In some circumstances, automatic updates to the `sfdx-project.json` file aren't desirable. For those times when more control is required, use these environment variables to suppress automatic updates to the project file.

For This Command	Set This Environment Variable to True
force:package:create	SFDX_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_CREATE
force:package:version:create	SFDX_PROJECT_AUTOUPDATE_DISABLE_FOR_PACKAGE_VERSION_CREATE

External Definition File for Features and Org Preferences

In previous releases, you specified the features and org preferences required for the metadata of your package in the `sfdx-project.json` file. To make this process consistent with how you define this information for a scratch org, specify the features and org preferences required for your package in a JSON file. Depending on your use case, you can use a single-definition, external JSON file for both packages and scratch orgs or maintain different JSON files. For packages, you can specify the filename in `sfdx-project.json` or when you run the `force:package:version:create` command.

 **Note:** During Summer '18, you can continue to specify feature and org preferences in the `sfdx-project.json` file. However, in Winter '19, we're requiring that you use an external JSON file.

In `sfdx-project.json`:

```
"definitionFile": "config/package-def.json",
```

From the command line:

```
force:package:version:create --package "Expense Manager" \
  --definitionfile config/package-def.json --wait 10
```

Support for CI Automation

CI scripts can't manually modify `sfdx-project.json` (like you can!). To support CI uses cases, you can specify the `--versionname`, `--versionnumber`, and `--versiondescription` package parameters when running the `force:package:version:create` command in your scripts. These values override what's in the `sfdx-project.json` file.

```
sfdx force:package:version:create --package "Expense Manager" \
  --versionname "Summer 2018" --versionnumber "1.3.0.3" --wait 10
```


How to Keep All Those Package Versions Straight

If you run `package:version:create` and don't specify a value for `--versionname`, the CLI sets the `--versionname` to `--versionnumber`. The combination of package name and version number helps to uniquely identify your package version.

Remove Components from Non-Namespaced Unlocked Packages (Beta)

You can remove components from non-namespaced unlocked packages even after you install the package.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

 **Note:** As a beta feature, Second-Generation Packaging is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for second-generation packaging in the [Packaging 2 Beta](#) group in the Trailblazer Community.

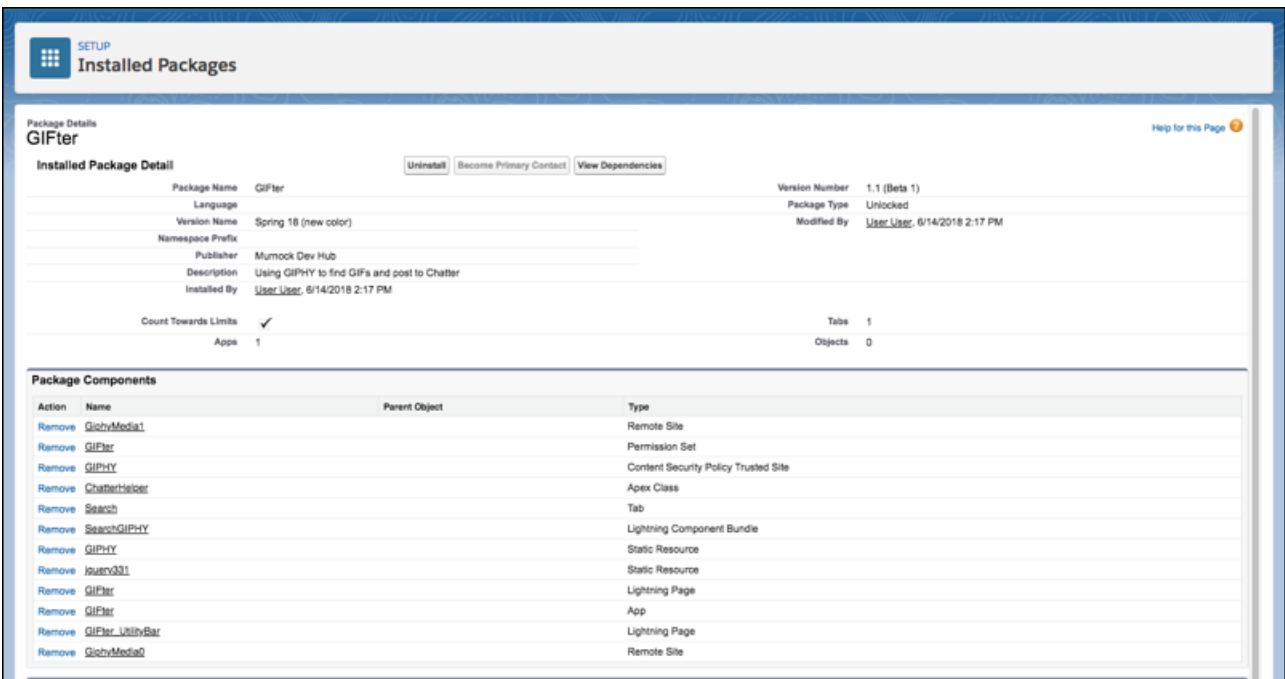
Why: In situations where you must immediately remove a component from a package in the installed org, you can do so if the package type is a non-namespaced unlocked package. The removed components still exist in the org but are no longer associated with that unlocked package.

Some important considerations:

- The components are removed only from the unlocked package in this specific org. If the same package version is reinstalled in the org, the components move back to the unlocked package.
- To permanently remove the components, remove the components from the package repo, create a new package version, and install that package version in the org.

How:

1. From Setup, enter *Installed Packages* in the Quick Find box, then select **Installed Packages**.
2. Click the package name.
3. In Installed Package Detail, click **View Components**.
4. Under Action, click **Remove** for each component to be removed from the package, then click **OK**.



Enhanced Validation Prevents Removing Active Records when Uninstalling Packages

When you uninstall a package containing account record types, a validation process prevents you from removing all active business and person account record types. Previously, this validation occurred only when removing an account record type from the Record Type Setup page.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Locked Packages Pilot Is Suspended

After careful consideration, we have decided to suspend the pilot for locked packages and to stop supporting them in Summer '18. The Salesforce CLI package commands no longer include the option to create a locked package.

This change helps us innovate and release new features faster for these package types.

- Unlocked packages for customers and system integrators (SIs)
- Second-generation managed packages for ISVs and partners

ISVforce: Enhanced AppExchange Publishing Experience

Distribute apps, Lightning components, and other solutions on AppExchange with the help of ISVforce tools. Get more flexibility when publishing Lightning Bolt Solutions, which now support custom apps, process flows, community templates, and pages. Use the Publishing Console to share your solution's logo and tile images with our marketing team.

IN THIS SECTION:

[Launch Business Solutions Quickly Using Lightning Bolt Solutions](#)

Create industry-specific solutions for your customers using a Lightning Bolt Solution. Distribute comprehensive business solutions that include custom apps, flows, Lightning Community templates, and pages.

[Submit Marketing Resources in the Publishing Console](#)

We're always excited to show off what AppExchange partners are building. If you want us to consider including your solution in our marketing materials, you can now submit a vector-based logo and tile image in the Publishing Console.

Launch Business Solutions Quickly Using Lightning Bolt Solutions

Create industry-specific solutions for your customers using a Lightning Bolt Solution. Distribute comprehensive business solutions that include custom apps, flows, Lightning Community templates, and pages.

Where: This change applies to Lightning Experience in all editions.

SEE ALSO:

[Create Business Solutions with Lightning Bolt Solutions](#)

Submit Marketing Resources in the Publishing Console

We're always excited to show off what AppExchange partners are building. If you want us to consider including your solution in our marketing materials, you can now submit a vector-based logo and tile image in the Publishing Console.

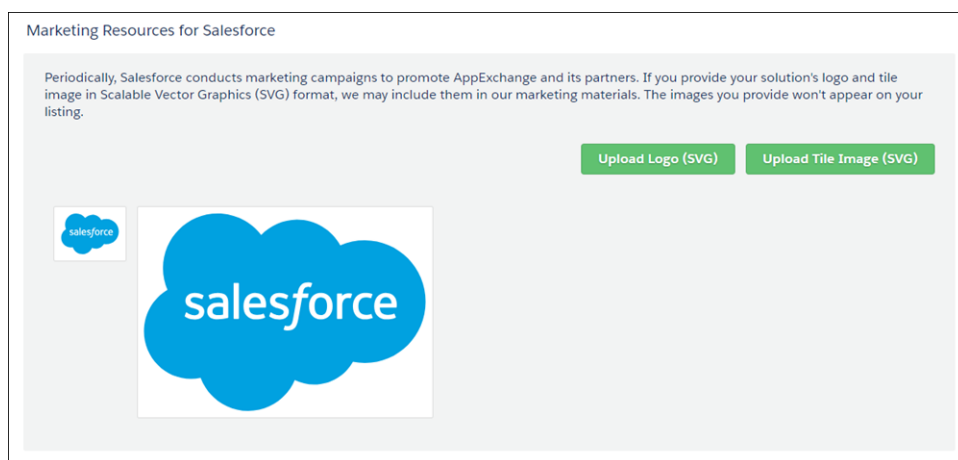
Where: This change applies to the Salesforce Partner Community.

Who: Partner Community members with the Manage Listings permission.

Why: Previously, if we wanted to feature your solution in our marketing materials, we'd ask you to email us the images in Scalable Vector Graphics (SVG) format. Now, you can upload them in the Publishing Console just like the other assets on your listing.

How: Open a listing in the Publishing Console and click **Media**. Then upload your solution's logo and tile image in SVG format.

When you upload an image, we check the format and size to make sure that your solution looks its best.



Marketing: Lightning Homepage, Google Analytics 360 Integration, and Other Features

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.

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

- [June 2018 Release](#)
- [April 2018 Release](#)
- [January 2018 Release](#)
- [October 2017 Release](#)
- [August 2017 Release](#)
- [June 2017 Release](#)

SEE ALSO:

[Marketing Cloud Overview](#)

[Salesforce Marketing Cloud Facebook Page](#)

Critical Updates

This release includes new critical updates for processes, flows, HTML-based email templates, and sandbox URLs. And we're postponing a critical update for `@AuraEnabled` Apex controllers.

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 org and modify affected customizations. After the opt-in period has passed, the update is activated. For more details, see [Respond to Critical Updates](#).

New Critical Updates

These critical updates are new in Summer '18.

Enable Partial Save for Create and Update Operations in Processes (Critical Update)

This update prevents a failed process from causing all running processes in the transaction to fail. Instead, Salesforce rolls back only the records that fail to save.

Enable Flow and Process Queries to Execute in Batches (Critical Update)

This update changes the way queries in flows and process are executed when they can be bulkified. Salesforce already bulkifies operations that create, update, or delete Salesforce records. Enabling query bulkification helps your org avoid reaching SOQL limits. If this critical update doesn't appear in your org's Critical Update console, your org already executes flow and process operations in batches.

Edit Self-Service User Permission Is Manage Customer Users

The "Edit Self Service User" permission is now named "Manage Customer Users". The functionality remains the same, but the permission is no longer enabled by default for new standard profiles.

Restrict Use of Salesforce Classic HTML-Based Email Templates to Secure Browsers (Critical Update)

This critical update prevents using HTML-based email templates, such as custom, Visualforce, or standard HTML templates, from Microsoft Internet Explorer. Internet Explorer doesn't support the Salesforce Content Security Policy (CSP), so it can't provide the required browser protection. We recommend that you use a browser with CSP support, such as Microsoft Edge, Google Chrome, or Mozilla Firefox.

Stabilize the Hostname for My Domain URLs in Sandboxes (Critical Update)

This critical update removes instance names from URLs. Prior to Summer '18, My Domain URLs in sandboxes included the instance name of the org. After this update, My Domain URLs for sandboxes exclude instance names.

Secure Topics for Salesforce Sites and Portals (Critical Update)

Topic names are exposed to all users in your org, including users in your org's Salesforce Sites and Portals created before Summer '13. For enhanced security of topics, we're turning off topics for guest and authenticated external users in Salesforce Sites and Portals.

Postponed Critical Updates

This critical update was announced in a previous release and the auto-activation date was postponed.

Postponed "Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing" Critical Update

This critical update, released in Spring '18, was scheduled for auto-activation in Summer '18, but has been postponed to Spring '19.

Help and Training

We added Trailhead modules and instructional videos. We also updated our Trust and Compliance documentation.

IN THIS SECTION:[Explore Features with Trailhead](#)

Looking for a good way to get familiar with Salesforce or discover 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.

[Watch Videos \(English Only\)](#)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

[Review Trust and Compliance Documentation](#)

We made seasonal updates to the Salesforce Trust and Compliance Documents.

Explore Features with Trailhead

Looking for a good way to get familiar with Salesforce or discover 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.

Check out Trailhead at <https://trailhead.salesforce.com>, and find the right trail for you. Here are the latest modules.

New Modules

Health Cloud Patient Data Displays

Tailor the health timeline, patient card, and list filters to cover your patients' needs.

Einstein Bots Basics

Learn how to make customer service smarter and easier with chatbots.

Field Service Preventive Maintenance

Track the installation, replacement, and periodic maintenance of your customers' assets.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new [Connecting to Salesforce in Outlook \(English Only\)](#) video provides an overview of the features available in Lightning for Outlook and Inbox Beta for Outlook. The features include adding records, managing tasks, logging email, and the productivity features available in Inbox Beta for Outlook.
- The new [Communities and Community Users in Your Salesforce Org \(English Only\)](#) video shows how communities live in an org and how Salesforce accounts and community users are associated with one another.
- The new [How Admins Set Up Einstein Activity Capture \(English Only\)](#) video shows you how to get your sales reps started with Einstein Activity Capture. Learn how to prevent certain activities from being added to Salesforce records, set defaults for how activities are shared, and select who can use the feature.
- The new [How Users Set Up Einstein Activity Capture \(English Only\)](#) video shows sales reps what they need to do to set up Einstein Activity Capture and how to configure their personal settings.
- The updated [Send Personalized Emails to a Group \(English Only\)](#) video covers changes made to list email functionality in the Summer '18 release.
- The updated [Use Tasks to Boost Your Sales Productivity \(English Only\)](#) video covers changes made to task functionality in the Summer '18 release.
- The updated [Search in Salesforce Lightning Experience \(English Only\)](#) video covers changes made to search functionality in the Summer '18 release.

Review Trust and Compliance Documentation

We made seasonal updates to the Salesforce Trust and Compliance Documents.

Infrastructure and Sub-Processors

The following changes have been made in the **Infrastructure and Sub-Processors Documentation**.

Sales Cloud, Service Cloud, Community Cloud, Chatter, Force.com, IoT Explorer, Site.com, Database.com, Einstein Analytics, Work.com, Financial Services Cloud, Health Cloud, Salesforce CPQ and Salesforce Billing

- **Infrastructure—Customer Data Storage:** Clarified that transmission of Customer Data may be routed through any of Salesforce's data centers, but that storage of such Customer Data will be limited to specified locations.
- **Content Delivery Networks:** Clarified language regarding the use of CDNs.

Commerce Cloud

- **Infrastructure—Customer Data Storage:** Updated Einstein branding and removed references to Store.
- **Infrastructure—Customer Data Storage:** Clarified that Amazon Web Services, Inc. stores Customer Data that is used in relation to analytics, and that information used for analytics purposes is anonymized prior to publication.
- **Content Delivery Networks:** Added CloudFront (Amazon Web Services, Inc.) CDN for the Digital and Einstein services. Described how the Dynamic Imaging Service feature uses Amazon's CloudFront CDN to store and deliver images, which flow through CloudFront and then the customer's CDN, and how CloudFront hosts images for Einstein Predictive Email.

Data.com

- Changed format of SFDC affiliate table.

“Einstein” (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Scope:** Added Salesforce Inbox (existing Service) and Einstein Bots (new Service) to the Infrastructure and Sub-processor Documentation. For uniformity and to enable consolidation, Salesforce Inbox descriptions in certain sections may vary from the original language.
- **Scope:** Added new Einstein opt-in features included for no additional charge as part of certain Sales and Service Cloud subscriptions to the Infrastructure and Sub-processor Documentation.
- **Infrastructure—Customer Data Storage:** Added additional details on when data is stored in Germany and when data is stored in the United States for Einstein Activity Capture.

Heroku

- No updates.

Desk.com, Einstein Discovery, LiveMessage, Quip, and SalesforceIQ CRM Services

- **Scope:** Removed Salesforce Inbox from document scope.

IoT Cloud

- No updates.

Marketing Cloud

- **Scope:** Removed Radian6 from the Marketing Cloud Infrastructure and Sub-processor Documentation.
- **Infrastructure—Customer Data Storage:** Added Canada to and removed Brazil from list of countries where Predictive Intelligence data may be stored. Removed Radian6 from the Marketing Cloud Infrastructure and Sub-processor Documentation.

Pardot

- No updates.

Salesforce DMP

- No updates.

Notices and Licenses

The following changes have been made in the **Notices and Licenses Documentation**.

Salesforce

- **Acceptable Use and External-Facing Services Policy:** Updated link to Acceptable Use and External-Facing Services Policy.

Commerce Cloud

- **Third Party Notices:** Updated third party flow through terms.
- **Third Party Notices:** Added that customers must comply with all applicable terms the Customer has agreed to with third party platforms and commercial entities that interoperate with Order Management, and included a list of those platforms and entities.

Data.com

- No changes.

Desk.com

- No changes.

Einstein Analytics

- No changes.

Einstein Discovery

- No Changes.

“Einstein” (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Scope:** Added Salesforce Inbox (existing Service) and Einstein Bots (new Service) to the NLI Documentation.
- **Scope:** Added new Einstein opt-in features included for no additional charge as part of certain Sales and Service Cloud subscriptions to the NLI.
- Re-structured document to make more clear which Non-SFDC applications and Content are used in which Service.
- **Salesforce Inbox:** Added new Non-SFDC Application Maxmind, which provides approximate geolocations if Customer chooses to use Read receipts.
- **Salesforce Inbox:** Added more details around non-SFDC Applications used to provide Contact Enrichment Information if Customer chooses to use Contact Enrichment.

Heroku

- No updates.

IoT Cloud

- Changed “IoT Cloud” to “IoT Cloud Services.”

LiveMessage

- No changes.

Marketing Cloud

- **Scope:** Removed Radian6 from Notices and License Information throughout. Updated naming for Einstein Marketing Recommendations to Einstein Recommendations, and for Krux to Salesforce DMP.
- **Acceptable Use and External-Facing Services Policy:** Updated link to Acceptable Use and External-Facing Services Policy.

Pardot

- No changes.

Quip

- **Acceptable Use and External-Facing Services Policy:** Updated link to Acceptable Use and External-Facing Services Policy.
- **Interoperation with Other Services:** Added information about Live Apps.

Salesforce DMP

- **Services Covered:** Replaced “Covered Services” with “Salesforce DMP Services” throughout and simplified definition for consistency and clarity.
- **Restricted Uses of Information and Compliance with Self-Regulatory Programs:** Removed definition of “Personal Data” for consistency. For clarity, removed reference to onboarding. Removed illustrative list of personal data and clarified exceptions to prohibition on submitting personal data (pseudonymous personal data and IP addresses). Consistent with NAI Code of Conduct, changed “non-personal identifiers” to “device-identifiable information” and removed sensitive data reference to status under the age of 18. Clarified that prohibition on sensitive health data includes “inferences.”
- **Notice to Customer’s Users:** Updated language to add clarity regarding the required notice, with privacy policy as an example.
- **Distributed Software:** Updated list of required notices.

SalesforceIQ (SalesforceIQ CRM and Salesforce Inbox)

- **Scope:** Removed Salesforce Inbox Service from the SalesforceIQ NLI Documentation, and added Salesforce Inbox to the combined document that also includes Sales Cloud Einstein, Einstein Engagement Scoring, Einstein Vision and Language, and Einstein Bots.

- Added notification that any rights and obligations directly related to the General Data Protection Regulation (GDPR) are not applicable to SIQ CRM or SalesforceIQ. This does not affect Salesforce's obligations regarding the Services currently branded as Salesforce Inbox.

Security, Privacy, and Architecture

The following changes have been made in the **Security, Privacy, and Architecture Documentation**.

Sales Cloud, Service Cloud, Community Cloud, Chatter, Force.com, IoT Explorer, Site.com, Database.com, Einstein Analytics, Work.com, Financial Services Cloud, Health Cloud, Salesforce CPQ and Salesforce Billing

- **Scope:** Clarified that new Einstein opt-in features included for no additional charge as part of certain Sales and Service Cloud subscriptions are covered by the Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language, and Einstein Bots Documentation.
- **Audits and Certifications:** Revised language describing the scope of SOC audits.
- **Audits and Certifications:** Revised language describing the scope of the for PCI AoC to exclude IoT Explorer and indicating that customers should not implement the deterministic encryption option when using Platform Encryption if they wish to benefit from Salesforce's PCI DSS AoC.
- **Audits and Certifications:** Added HITRUST certification information.
- **Deletion of Customer Data:** New table with timelines for deletion of data after termination.

Commerce Cloud

- **Audits and Certifications:** Removed CSA Star because Commerce Cloud no longer undergoes this assessment, and has aligned with the core Salesforce services.
- **Audits and Certifications:** Added that the Einstein capability undergoes an independent evaluation in the form of SOC 2 and SOC 3 audits.
- **Security Policies and Procedures:** Clarified that user passwords are stored encrypted or using a salted hash.
- **Intrusion Detection:** Updated language describing that Salesforce will monitor the Commerce Cloud Services for unauthorized intrusions, including to prevent fraudulent authentication of customer accounts (versus shopper accounts).
- **User Authentication:** Added that passwords are encrypted for Order Management.

Data.com

- Added restriction on submitting contact information for individuals located in the UK or Europe.

"Einstein" (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Scope:** Added Salesforce Inbox (existing Service) and Einstein Bots (new Service) to the Security, Privacy, and Architecture Documentation. For uniformity and to enable consolidation, Salesforce Inbox descriptions in certain sections may vary from the original language.
- **Scope:** Added new Einstein opt-in features included for no additional charge as part of certain Sales and Service Cloud subscriptions to the Security, Privacy, and Architecture Documentation.
- **Security Logs:** Security logs are kept for all Covered Services
- **Deletion of Customer Data:** Updated language to provide explicit timeline according to which, at the end of Term, data will be removed from active media and deleted from backup storage.
- **Sensitive Information:** Added restrictions on the use of Einstein to predict sensitive personal information, and the use of Einstein to automatically make decisions with legal effect.

Heroku

- **User Authentication:** Added additional details on user authentication via Single Sign On.
- **Data Encryption:** Added additional details on encryption at rest for selected Heroku Postgres plans.

- **Return of Customer Data:** Removed a statement regarding contract termination.
- **Deletion of Customer Data:** Clarified the time period for the deletion of Customer Data.

Desk.com, Einstein Discovery, LiveMessage, Quip, and SalesforceIQ CRM Services

- **Services Covered:** Removed Salesforce Inbox from document scope.
- **Third-Party Functionality:** Added information regarding access to message content by over the top third party messaging providers for messages sent using their platform.
- **Sensitive Information:** Added restrictions on the use of Einstein to predict sensitive personal information, and the use of Einstein to automatically make decisions with legal effect.

IoT Cloud

- No updates.

Marketing Cloud

- **Services Covered:** Removed Radian6 throughout.
- **Audits and Certifications:** Added HITRUST certification for ExactTarget services.
- **Security Controls:** Clarified applicability of certain controls to specific services.
- **Reliability and Backup:** Retention of backup changed from 24 weeks to 90 days.
- **Data Encryption:** Clarified Transport Layer Encryption language.
- **Deletion of Customer Data:** Updated language to provide timelines for deletion by service. Clarified backup data deletion and timeline.

Pardot

- No updates.

Salesforce DMP

- **Services Covered:** Replaced "Covered Services" with "Salesforce DMP Services" throughout and simplified definition for consistency and clarity.
- **Viruses:** Simplified description for consistency; removed customer acknowledgement.
- **Deletion of Customer Data:** Updated language to provide explicit timeline according to which, at the end of Term, data will be removed from active media and deleted from backup storage.
- **Sensitive Data:** Changed section title from "Sensitive Data" to "Personal Data and Sensitive Data." Removed definition of "Personal Data" for consistency. For clarity, removed reference to onboarding. Removed illustrative list of personal data and clarified exceptions to prohibition on submitting personal data (pseudonymous personal data and IP addresses). Consistent with NAI Code of Conduct, changed "non-personal identifiers" to "device-identifiable information" and removed sensitive data reference to status under the age of 18. Clarified that prohibition on sensitive health data includes "inferences." Made non-substantive wording changes related to sensitive data.
- **Analytics:** Added definition of "Anonymized Data" and described its use to create reports, including marketing reports. Clarified that Anonymized Data does not contain personal data.

Other Salesforce Products and Services

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).

Success Cloud

The certified experts, consultants, and innovative tools of Salesforce Success Cloud are here to help with professional services, prescriptive advice, and expertise at every stage of your journey.