

salesforce

Salesforce Winter '19 Release Notes

Salesforce, Winter '19

Blaze new trails to connected customer experiences



 @salesforcedocs

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SALESFORCE WINTER '19 RELEASE NOTES

The Winter '19 release delivers more connected customer experiences with new features that help your teams drive lasting customer relationships.

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 Winter '19 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 made it easier to find what you need in our supported browsers documentation. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience. As of April 5, 2019, we no longer support Internet Explorer 9 and 10. You can continue to access these browsers, however, Salesforce will not provide support for issues that you encounter using them.

[Salesforce Overall: More Ways to Adopt Lightning Experience and Boost Productivity](#)

We introduce new ways to ease and encourage users to transition to Lightning Experience. Also, get insight into why users are switching back to Salesforce Classic with a new feedback form. Personalize your view in Lightning Experience with display density controls. Fast track your communication with predefined quick text messages in emails, tasks, events, and chats. Search within list views, and share your favorite list view with your team. Check out the ways that we bolstered surveys, search filters, and Lightning console apps. And that's only half of it.

[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: In-App Trailhead Badges, Subscription Management, and Improvements in Sales and Service](#)

Stay in the app to celebrate, set up, and subscribe to Salesforce Essentials with in-app Trailhead badging, improved setup flows and a new subscription page. In Sales Essentials, tackle more tasks with improved setup flows. In Service Essentials, create a self-service help center and use CTI to let agents make calls from their computers with a softphone.

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Improvements and new features in Einstein Forecasting, Activity Capture, Bots, and Analytics give you greater flexibility, quicker setup, and easier insights. Take a look at the brains we packed into your business machine.

[Sales: Enhancements to Forecasting, Email Integration, Salesforce CPQ, and Pardot](#)

Custom fields in Einstein Forecasting make Salesforce more intelligent. Measure sales performance with territory-based quotas and forecasts. Extend the world's No. 1 CRM to email and calendar via integration with Microsoft® and Google. Build recurring relationships with your customers with CPQ Evergreen Subscriptions. And get smarter marketing automation with Pardot in Lightning Experience.

[Service: Text Messaging and Facebook Messenger Support with LiveMessage, Help Center for Small Businesses, and Field Service Dispatching in Lightning Communities](#)

Enjoy a cornucopia of new features to help bring your customer service to the next level. LiveMessage in Lightning Experience lets you engage with customers on top messaging channels from the Lightning Service Console. With Help Center, create a help site to share Knowledge articles and let customers log cases for issues that require human intervention. In Lightning Flow for Service, view completed steps in the Guided Action History and alert agents to required steps. Share dispatching responsibility with your field service contractors by giving them access to the dispatcher console from a community. Finally, power your Einstein bots to do more for your customers with process automation flows.

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

Drive decisions with insights from reports and dashboards and Einstein Analytics. Drill down in Lightning Experience reports to get the details behind the numbers. Create Einstein Analytics assets with templates, enhanced sharing security, file-based data connectors, and much more.

[Communities: Threaded Discussions, Recognition Badges, Flow for Guest Users, Help Center Template, and More](#)

Communities elves have been hard at work this release, bringing amazing features and improvements. Your community members can finally have actual conversations using threaded discussions. Recognition badges help motivate community members and drive adoption. Guest community users can use flows to do a host of things in a community without logging in. And your customer support can help customers help themselves by quickly setting up a knowledge base community using the new Help Center template. All this and a host of new components, security features, and general improvements to keep your community implementations buzz-worthy.

[Chatter: Draft Posts, Cursor Focus Improvement, Date Format Fix](#)

Automatically save your posts as drafts as you're composing. Now when you post, the cursor moves to the text body instead of the To field so you can start writing your post right away.

[Files: Sharing Folders Publicly and File Details on Mobile](#)

Use public links to share folders, so you can deliver collections of files to your employees, partners, customers, and prospects. Access file details on the go with mobile file detail pages.

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

Check out the latest features for getting more done no matter where you are.

[Financial Services Cloud: Action Plans, Salesforce Surveys, Commercial Banking, Einstein Bots, and Rollup Enhancements](#)

Standardize customer engagement processes with Action Plans task templates. Find out what's on customers' minds with Salesforce Surveys. Give bankers a more holistic view of customers with the Commercial Banking Console Lightning app. And help customers help themselves with Einstein Bots for Financial Services Cloud. Plus, accelerate data insert and update operations with the enhanced rollup framework in Financial Services Cloud.

[Health Cloud: Utilization Management, Health Insurance Data Model, More Usability Enhancements](#)

Health Cloud now supports seamless collaboration among healthcare providers and payers. Providers can submit and track requests for authorization, and payers can process requests to make sure patients get the right care, at the right time, in the right place. And we've added new Lightning components to make it easier to build your own custom record pages for your users.

[Customization: Einstein Next Best Action Pilot and Enhancements to Lightning App Builder and Lightning Flow](#)

Continue making your org smarter with the Einstein Next Best Action pilot. Make your Lightning pages more dynamic and more useful with a new component visibility rule parameter and new components. Beef up your flows with a host of new screen components, expanded limits, and the ability to deploy flows and processes as active.

[Security and Identity: More Sign-Up, Login, and Logout Options; Fields You Can Encrypt; and Ways to Protect Your Users](#)

Your community members and other external users can now use an email address or a phone number to log in or sign up, and with single logout, you can identify which user sessions to end. You can encrypt many more fields and control who can change encryption policies. The new transaction policy wizard makes creating transaction security policies faster and easier. And your users are safer with alerts that warn them before they are redirected from Salesforce.

[Salesforce IoT: IoT Insights Lightning Component, Event Sender, Event Viewer, and Context Improvements](#)

Salesforce IoT has innovations to help you create unique and memorable customer experiences. You can add your Salesforce IoT data on any page in Salesforce with our new IoT Insights Lightning component. New troubleshooting features let you send event messages inside the app and view the messages as they are received. We're also making contexts easier to use and improving trackers.

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

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to the Salesforce Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

[Marketing: Multiple Business Units in Distributed Marketing and Customized Links in Facebook Posts with Social Studio](#)

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 a new critical update for email security. And we're retiring the critical update that enforces stricter content security policy for Lightning components.

[Help and Training](#)

We added Trailhead trails, modules, and projects, and instructional videos. We also added a new implementation guide for Salesforce Engage and 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:

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

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively 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.

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 the 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.

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 Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively 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 added experience information to the applicable release notes at the highest level: 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	
Ability to Share List View with Group in Lightning	Collaborate with Ease with List View Sharing
Sales	
Allow Task Reminders to be set When Creating from a Lightning Quick Action	Include Reminders with Task Quick Actions
Reminder Set for New Task in Lead Record	
Broken Set Reminder Box in Lightning Quick Action Version	
Mark Bounced Email Activities as Bounced	Bounce Back from Email Bounces
	See Email Tracking and Bounce Information in the Activity Timeline
View HTML Email Status in Opportunities and Accounts	Quickly See Whether Customers Open Email from Your Company
	See Email Tracking and Bounce Information in the Activity Timeline
HTML Email Status in Lightning	Quickly See Whether Customers Open Email from Your Company
	See Email Tracking and Bounce Information in the Activity Timeline
Collaborative Forecasting via Territory Hierarchy	Forecast Sales by Territory (Generally Available)
Incomplete/Open Tasks to Be Visible in Salesforce Calendar	Customize Which Tasks You See on Your Calendar
"Evaluate This Account Against Territory Rules on Save" in Lightning Experience	Trigger Territory Assignment on Account Update in Lightning Experience

IdeaExchange	Idea delivered
Service	
Email to Case Attachments -- Add to Files	Share and Preview Files By Automatically Saving Email-to-Case Attachments as Salesforce Files
Allow "Inline" Images in Email Sent from SFDC	Embed Images into Case Emails in Lightning Experience
Communities	
Allow Duplicate User Names with Partner Communities and Gold Partner Licenses	Require Unique Usernames for Partners at the Org Level
Control Community User Visibility Per Each Community	Control Community User Visibility (Beta)
Detect if Contacts Are Partner Portal Users or Customer Portal Users From Account	Encourage External Delegated Admins to Manage Their Teams (Generally Available)
Customization	
"Where is this used?" button for all fields	Check a Field's References Before You Edit It (Pilot)
Development	
Allow Apex to Call Salesforce REST and SOAP APIs Without a Remote Site Setting	Streamline API Calls to Your Org from Apex Code
Use Custom Metadata Types in Formulas	Custom Metadata Types: Storing Formula Parameters to Consolidate Updates, Editing Records in Memory Within Apex

Other Resources

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

- [Release Readiness Trailblazers](#). Join a community of Salesforce experts.
- [Release Demos](#). Get quick video overviews of what's coming this release.
- [Release Overview](#). Create internal training for your users, review setup screens, and learn how to use features.
- [Release in a Box](#). Take a look at our enablement kit.
- [Customer Success Event Calendar](#). Search by release and register for events.
- [Release Readiness Live](#). Register and make the most of the new features.
- [Winter '19 Release Website](#). Check out the new features.
- [Winter '19 Release Highlights Module](#). Get the Winter '19 Trailhead badge.
- [Certification Release Maintenance Schedule](#). Keep your certification updated—now in Trailhead.
- [Sandbox Preview Instructions](#). Test new features in your sandbox.

Release Note Changes

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

January 15, 2019

Scale Your Event-Based Apps with High-Volume Platform Events (Generally Available)

Updated to indicate that High-Volume Platform Events is generally available.

Keep Your External Data Up to Date with Change Data Capture (Generally Available)

Updated to indicate that Change Data Capture is generally available.

Record Encrypted Data with Change Data Capture

Updated to indicate that Change Data Capture is generally available.

December 12, 2018

Move Actions and Buttons Easily When Transitioning to Lightning Experience (Beta)

Updated editions information.

Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter

Updated editions information.

Include IoT Components in a Managed Package

Added a release note to announce the availability of Salesforce IoT for packaging.

December 4, 2018

UI Improvements in the Pardot Lightning App

Added a release note to announce UI updates.

Send Engage Campaigns from More Places

Added a release note to announce feature improvements.

November 30, 2018

Build Your Own Salesforce CLI Plug-In to Get Just What You Need (Generally Available)

Updated the release date for Salesforce Plug-In Generator to December 6, 2018.

November 27, 2018

Retention Limit for Field History Data Is Now Enforced

Updated to clarify the 18-month retention policy.

Customize Einstein Email Insights to Fit Your Business

Updated to reflect that users need the Customize Application permission to create custom email insights.

Reach Out to the Right People with Recommended Connections

Updated to reflect all prerequisites for using the feature.

Guide Your Users' Transition to Lightning Experience with Change Management Resources

Updated to reflect the correct name of the app.

Open Hyperlinks in Formula Fields Correctly

Added a critical update that correctly honors the target values for hyperlinks contained in formula fields.

Generate Survey Invitations Automatically

Automate generating survey invitations when a record is updated by using the Process Builder.

Build Your Own Salesforce CLI Plug-In to Get Just What You Need (Generally Available)

Added a release note for the November 29, 2018 GA of Salesforce CLI Plug-In Generator.

November 14, 2018

Explore Features with Trailhead

Announced new module: Advanced Territory Management.

New Objects

Added ForecastingShare.

Metadata API

Updated the change to ForecastingSettings.

Notification Banner Permission Changes

Announced changes to notification banner permissions.

Salesforce CLI: Join the Evolution

Clarified that the new `force:source` commands aren't intended for production orgs.

Control Access to Activities

Announced a new user permission: Access Activities.

Bot Clicks Filtered from Pardot Actions and Reports on page 182

Added information about default visitor filters.

Include Partner Users on Teams in Lightning Experience

Added an announcement that account teams using Lightning Experience can now include partner users in addition to internal users.

This change also applies to [opportunity teams using Lightning Experience](#) on page 358, [account and opportunity teams using Lightning communities](#) on page 358, and [account and opportunity teams using all versions of the Salesforce app.](#) on page 383.

November 7, 2018

Reach Out to the Right People with Recommended Connections

Corrected the content to remove mention of person accounts.

Guide Your Users' Transition to Lightning Experience with Change Management Resources

Added announcement about the new Change Management app for Lightning Experience.

October 31, 2018

Deploy Active Processes and Flows Using Change Sets or Metadata API

Clarified that the new setting is available only in production orgs.

Quickly See Whether Customers Open Email from Your Company

Added details about how email tracking works.

Turn Off Email Tracking for Specific People

Added details about how email tracking works.

Use Sharing Sets with Contacts with Multiple Accounts (Beta)

Corrected setup instructions and beta note.

Give Communities Users Analytics Insights Under the New License

Added announcement of Analytics for Communities support of the new Lightning External Apps Plus license.

October 24, 2018

Review Trust and Compliance Documentation

Added updates to our Trust and Compliance documentation.

Retention Limit for Field History Data Is Now Enforced

Updated the Field History Tracking delete language to clarify how long the grace period is before data is deleted.

Productivity Features: Lightning Experience Considerations

Revised considerations for working with event series (beta) in Lightning Experience.

Winter '19 Features That Are Different or Not Available in the Salesforce App

Revised considerations for working with event series (beta) in the Salesforce mobile app.

Changed Objects

The SharedForecastManagerRoleId field in ForecastingShare can now represent a territory whose forecasts you want to share.

View Page Performance by Browser and Other New Metrics in the Lightning Usage App

Revised to add link to Salesforce Help article: Get Lightning Experience Adoption Insights from Custom Reports.

October 22, 2018

Ensure Access to Documents with Proper Permissions

Users need the correct profile permission to access documents in Salesforce Classic.

October 17, 2018

New Analytics Templates: Analyze Data from Multiple Orgs in Sales App, Get Instant Insights into B2B Commerce Metrics

Announcing two new Analytics templates.

Role Hierarchy Filter Requires a Role Selection

Added new topic covering role hierarchy filter updates to reports in Lightning Experience.

Update Subtopic Elements on Headline Component in Your Community

If you're using the Headline component in your community and showing subtopics on your topic detail page, you may need to update a few selectors. Still planning to continue using custom CSS overrides? Then migrate them after you update the template.

Turn Off Email Tracking for Specific People

Updated information about fully setting up data protection and privacy for email tracking.

Quickly See Whether Customers Open Email from Your Company

Updated information about where email tracking doesn't apply and added information about email tracking for emails sent before the Winter '18 release.

Filter Search Results for Custom Objects

Getting too many results for custom objects? Filter them and find the right one.

Quickly See Whether Customers Open Email from Your Company

Updated information about where email tracking doesn't apply.

Watch Videos (English Only)

Updated the video about using Collaborative Forecasts in Lightning Experience.

Search and Share List Views and Filter Campaign Related Lists

Added new topic covering additions to Record List component functions in Communities.

Export Themes, Just like Whole Sites and Pages

Corrected availability listing for feature.

Validate Head Markup as You Type

Corrected availability listing for feature.

Set Allocations and Limits for Scratch Org Features

Added information for how to set allocations and limits for some scratch org features.

Access External Insurance Claims Data

Added new topic introducing the Health Cloud claims data model.

Use Lightning Data Service in More Containers

Added information about expanded support for Lightning Data Service

Enable CDN to Load Lightning Experience Faster

Corrected effect of availability listing for feature in Communities.

Invite Person Accounts to Participate in Surveys

You can now send survey invites to people associated with person account records.

View a Person Account's Survey Invitations

The new Survey Invitation related list shows which surveys a person account has been invited to take.

Choose Whether Participants Must Log In to Take a Survey

You can choose whether to require participants to log in to take a survey.

Give Guest Users Permission to Create Surveys and Ideas

You can now give guest users in your community permission to create, view, and update surveys. You can also give guest users in your community permission to view ideas.

Customizable Forecasting Is Being Retired

Customizable Forecasting is scheduled for retirement in all Salesforce orgs as of Summer '20.

Territory Management Is Being Retired

The original territory management feature is scheduled for retirement in all Salesforce orgs as of Summer '20.

Help Customers Help Themselves with Einstein Bots

Added a See Also link to a new topic in the Financial Services Cloud Administrator Guide.

Changed Objects

Surveys can now be associated with ServiceAppointment and custom objects.

Recover Your Unsaved Text After Getting Timed Out

If the application has updates, no modal displays. Instead, the page reloads as it did before Winter '19.

October 10, 2018

New Objects

Added a new API object ContentDocumentListViewMapping that associates list views and Quip documents.

Metadata API

Added the `isVisibleByExternalUsers` field to the ContentAssets object, which allows asset files to be visible to unauthenticated users.

Watch Videos (English Only)

Added a new video about connecting to Salesforce in Gmail.

Use Engage for Gmail Extension with the New Gmail UI

Added a note about Gmail's new UI support.

Improve Your Salesforce Implementation with Optimizer

Optimizer version 2.7 was released with updates to the top success resources.

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

Added a release note about a mobile feature available for Salesforce for Android and iOS.

Einstein Data Insights: Learn More from Your Reports (Generally Available)

Einstein Data Insights is now generally available with enhanced functionality.

Metadata API

Added information about new metadata types that support Omni-Channel: OmniChannelSettings, PresenceDeclineReason, PresenceUserConfig, QueueRoutingConfig, ServiceChannel, and ServicePresenceStatus.

Field History Tracking

Clarified the length of the grace period to recover field history data older than 18-months.

Salesforce CLI: Join the Evolution

Provided information on all the new features and changes in Salesforce CLI v44, which releases on October 13, 2018.

Executive News Articles No Longer Available

Added release note to announce that the News component and News app no longer include articles about company executives.

Run a Full Sync Without Contacting Pardot Support

Added a release note about a new feature available to Pardot admins.

New Objects

Added a new standard object RemoteKeyCalloutEvent that records event information for callouts that fetch encrypted key material from a customer endpoint.

Use Lightning Data Service in More Containers

Added information about expanded support for Lightning Data Service.

October 5, 2018

Improve Security for Sites and Communities by Restricting Record Access for Guest Users

Added a release note about a critical update that restricts record access for guest users in sites and communities.

October 4, 2018

Removed: View Your Community Like a Guest

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.

October 3, 2018

Enable Operational Email

Added a setting to enable operational emails in Pardot.

Quickly See Whether Customers Open Email from Your Company

Clarified that email open tracking isn't available with Email-to-Case.

Customize Einstein Email Insights to Fit Your Business

Clarified that custom Einstein Email insights are available in the Salesforce Inbox mobile app, but aren't available with Einstein Activity Capture standard.

Share More Sharing Settings in Einstein Analytics

Clarified the coverage enhancement for the opportunity object.

Multi-File Upload Not Available for Microsoft Internet Explorer Versions 9 and 10

Updated browser version to IE10 instead of IE11. Specified that this change applies to the Files tab in Salesforce Classic.

Einstein Forecasting: Optimize Your Forecasting Model with Custom Fields

Clarified that the feature is generally available rather than beta.

Salesforce CLI: Join the Evolution

Clarified that the new non-source-tracked org commands are in beta.

Scratch Orgs: More Features and Supported Metadata Types

Added that you can enable Dev Hub in Developer Edition orgs.

Help and Training

Added new Trailhead trails, modules, and projects, instructional videos, and a new implementation guide for Salesforce Engage.

Align Sales and Marketing on a Single Platform with Pardot in Lightning Experience (Generally Available)

Removed enablement instructions.

Removed moment Global Variable

Prior to Winter '19, customers could access the `moment` global variable that's part of Moment.js. This usage of `moment` in custom Lightning components was never intentional or supported.

Metadata API

Added information about the `enableE2CSourceTracking` field on the `CaseSettings` type.

Leads: Reject Leads That Don't Use reCAPTCHA

Clarified information about the impact of the **Require reCAPTCHA Verification** setting on existing orgs that use reCAPTCHA.

Fight Spam—Reject Cases Without reCAPTCHA Verification

Clarified information about the impact of the **Require reCAPTCHA Verification** setting on existing orgs that use reCAPTCHA.

Use Multi-Select Picklists Easily in Lightning Experience

Added information about improvements to multi-select picklists in Lightning Experience

Inbox: Get More Relevant Suggestions with Custom Einstein Email Insights

Added an entry about Custom Einstein Email Insights being supported in the Salesforce Inbox mobile app.

Add Code Snippet Settings to Your Communities Snap-Ins

Clarified that this feature isn't available until October 16, 2018.

Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans

Added screenshots.

Get a More Holistic View of Customers with Commercial Banking

Added screenshots.

Use the Improved Rich Text Editor

Added a release note about changes to how Salesforce CPQ handles rich text fields.

Setting Price Rates for Usage-Based Products (Beta)

Added links to information about usage-based products.

Generate Subscriptions Without End Dates

Added links to information about evergreen subscriptions.

Change Revenue Schedule Available Balances with Revenue Adjustments

Added a link to information about revenue adjustments.

Recover Your Unsaved Text After Getting Timed Out

Added a screenshot and explanation for application updates that require a refresh.

New and Changed Lightning Components

Added a note that URLs for the `lightning:isUrlAddressable` and `lightning:navigation` components are case-sensitive.

Predict What's Next in Your Business with Einstein Prediction Builder (Beta)

Announced that Einstein Prediction Builder continues its beta program in this release.

September 19, 2018

The Lead Change Analytics Template Helps You Convert Leads to Business

Announcing new template to provide insight into lead conversions for customers who track lead history.

Streamline Connected App Integrations with OAuth 2.0 Endpoints (Beta)

The dynamic client registration and token introspection endpoints support the `login.salesforce.com` URL only after all instances are upgraded to the Winter '19 release. If you enable these endpoints before all instances are upgraded to Winter '19, use a My Domain, community, or instance URL.

Locker API Viewer in the Component Library

Access the Locker API Viewer in the Component Library.

Evaluate and Benchmark JavaScript Code with Locker Console

Use this new tool in the Component Library to evaluate JavaScript code for Locker Service compatibility.

User Profile Image Storage on Android

To prevent crashing on Android L devices, the Field Service Lightning Android Mobile App 4.1.1 patch, released September 11, 2018, puts user profile images in external device storage. The new permission is automatically enabled with the patch.

Extend Flows with Third-Party Systems and Apps Using Flow Solutions on AppExchange

Added a release note announcing flow solutions on Salesforce AppExchange.

Deliver More Personalized and Appropriate Care with Utilization Management

Specified that the utilization management features become available after Winter '19 release is complete.

Unify Membership, Benefits, and Preauthorizations with the Health Insurance Data Model

Specified that the insurance data model features become available after Winter '19 release is complete.

Einstein Discovery: Integrated in Einstein Analytics

Added a section about Einstein Discovery integrated into Analytics and other new features.

Analytics Mobile Apps: Push Notifications, Dynamic Pages, Offline (pilot), New Charts, and New Widgets

Added a section about the new features for Einstein Analytics for iOS and for Android.

September 12, 2018

The Approval Analytics Template Gives You Instant Insight into Your Approval Processes

Announcing new Analytics Templates to help customers analyze approvals processes.

Pricing, Subscription Templates Take Salesforce CPQ Analytics to a New Level

Announcing new Analytics Templates for Salesforce CPQ customers.

Avoid Data Drift with Periodic Full Sync

Updated name of mode from Sync Mode to Connection Mode.

Turn Off Email Tracking for Specific People

Clarified which data protection and privacy preferences Salesforce email honors.

Customize Einstein Email Insights to Fit Your Business

Added Essentials as a supported edition. Clarified that custom email insights don't apply to person accounts.

Act on Einstein Email Insights

Added Essentials as a supported edition.

Reach Out to the Right People with Recommended Connections

Added Essentials as a supported edition. Clarified that recommended connections apply to contacts, leads, and person accounts. Explained that you need to add the recommended connections component to contact, lead, and person account page layouts.

Salesforce for Outlook Not Available for Customers New to the Product

Clarified that orgs with any users logging into Salesforce for Outlook over the last release (Spring '18) don't lose access to the product in Winter '19.

You Asked for It!

Added Ideas that we delivered.

Help Customers Help Themselves with Einstein Bots

Corrected the license name to Einstein Bots.

Setting Price Rates for Usage-Based Products (Beta)

Added release note for the usage-based products beta feature.

Set Up Salesforce CPQ Winter '19

Added release note for revenue amount fields.

Set Up Salesforce CPQ Winter '19

Added setup and installation instructions for Salesforce CPQ Winter '19. Clarified install path for CPQ users on versions before 214.12.2.

Control Community User Visibility (Beta)

Added closed beta feature that controls member visibility on a community-by-community basis.

Quickly See Whether Customers Open Email from Your Company

Clarified how email open tracking works with Einstein Activity Capture.

Move Actions and Buttons Easily When Transitioning to Lightning Experience (Beta)

Updated the list of supported objects and required permissions.

Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter

Updated list of required permissions.

Learn Why Users Are Switching Back to Salesforce Classic

Updated label of the section on the setup page.

Keep Users in Lightning Experience

Updated to indicate that orgs that don't contain custom profiles can't use the feature.

Roll Out the Welcome Mat for New Lightning Experience Users

Updated label of the section on the setup page.

Monitor Your Processes and Flows with New Usage-Based Entitlements

Clarified that the information is about the Usage-based Entitlements related list.

Dev Hub: Now Available in Developer Edition and Trial Orgs

Announcing that you can enable Dev Hub in Developer Edition and trial orgs.

September 11, 2018

Test Scheduled Actions and Waiting Flows with Apex

Removed a note that incorrectly announced the ability to test scheduled actions and waiting flows with Apex.

September 5, 2018

Retail Banking Template For Financial Services Cloud Customers Helps Deepen Customer Relationships and Attract New Clients

Announcing new Analytics template for Financial Services Cloud customers.

Veeva CRM Customers: Visualize Sales Processes and Performance With Salesforce Analytics for Veeva Template

Announcing new Analytics template for Veeva customers to manage sales call processes.

It's About Time—Date Format for Spanish Locales

Removed a note that incorrectly announced the repair of Chatter date and time stamps that are localized to Spanish.

Track File Stats with the File Engagement Card

Added a release note about the File Engagement card on the file detail page.

New and Changed Lightning Components

Added new attributes to the lightning:fileCard component that controls the display of the file description caption.

Enable CDN to Load Lightning Experience Faster

Clarified that this setting doesn't affect any version of the Salesforce app.

Lock Down Information During Installation of Installation-Key-Protected Unlocked Packages

Removed references to passwords.

More Metadata Components Are Hard-Deleted in Unlocked Packages

Removed FlowDefinition from the list of hard-deleted metadata components.

Opt Out of Instanceless My Domain URLs

Added a release note about deactivating the CRUC that enabled instanceless My Domain URLs.

Adopt Instanceless My Domain URL Best Practices

Added a release note about creating packages that support instanceless URLs.

Salesforce CLI: Join the Evolution

Added information for a new command, `force:source:delete`.

Changed Objects

Event series fields are read-only in the API.

Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams

Specified that this enhancement is also available in the Salesforce app.

Get More Configuration Options with Scratch Org Settings

Scratch org settings are a new format to replace org preferences in the scratch org definition file.

Let Partners Dispatch from Communities

Corrected the license requirements for using the dispatcher console in a community.

Change Your View with Display Density Settings

Corrected the name of the setup page to Density Settings.

Changed Objects

Under EventLogFile, in the Wave Change event type, the IS_EMBEDDED and IS_EMBEDDED_IN_COMMUNITY fields were removed.

Share and Organize Macros and Quick Text in Folders

Corrected the information about using split view with macros and quick text when folders are enabled.

August 29, 2018

Add Attachments to List Emails

Removed references to email actions.

Require Unique Usernames for Partners at the Org Level

Added a note stating that uploads using Data Loader, Excel Import, and Sendia are not available to partner users with this preference enabled.

Reminder About Loss of Functionality for Earlier Salesforce for Outlook Versions

Clarified that Microsoft Internet Explorer versions 8, 9, and 10 support ended in Spring '17. As a result of that change, earlier versions of Salesforce for Outlook lose some functionality because they were built to run on those browsers.

New Objects

Added the Audience object.

Upgrade Flow Files to API Version 44.0 with the Salesforce CLI

Added information to the How section to indicate to first install the pre-release version of Salesforce CLI.

Securely Retrieve and Display Third-Party Images in Visualforce Pages

Added a release note announcing IMAGEPROXYURL function.

Improve Security by Isolating Untrusted Third-Party Content with iframes

Added a release note about using iframes to isolate content on a separate domain.

Run the Einstein Readiness Assessor in Sandbox

Added information about sandbox support.

Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter

Added announcement detailing enhancements to the JavaScript Buttons feature in the Lightning Experience Configuration Converter.

Improve Your Salesforce Implementation with Optimizer

Added announcement detailing enhancements the Salesforce Optimizer for version 2.6.

Automate More Business Processes with Increased Per-Org Limits

Corrected information in the Why section to indicate that two limits are for each process or flow type and not all process and flow types combined.

BatchApexErrorEvent

Added the BatchApexErrorEvent object.

New Apex Exceptions

Added the exception `Auth.DiscoveryCustomErrorException`.

Removed: Drive Compelling Customer Experiences at Enterprise Scale with Salesforce IoT Advanced

Removed entry for Salesforce IoT Advanced due to changed availability in Winter '19.

August 20, 2018

Salesforce Winter '19 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 Winter '19 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 made it easier to find what you need in our supported browsers documentation. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience. As of April 5, 2019, we no longer support Internet Explorer 9 and 10. You can continue to access these browsers, however, Salesforce will not provide support for issues that you encounter using them.

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

Salesforce Overall

We introduce new ways to ease and encourage users to transition to Lightning Experience. Also, get insight into why users are switching back to Salesforce Classic with a new feedback form. Personalize your view in Lightning Experience with display density controls. Fast track your communication with predefined quick text messages in emails, tasks, events, and chats. Search within list views, and share your favorite list view with your team. Check out the ways that we bolstered surveys, search filters, and Lightning console apps. And that's only half of it.

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				
Roll Out the Welcome Mat for New Lightning Experience Users		✓		
Learn Why Users Are Switching Back to Salesforce Classic			✓	
Keep Users in Lightning Experience			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Guide Your Users' Transition to Lightning Experience with Change Management Resources	✓			
Move Actions and Buttons Easily When Transitioning to Lightning Experience (Beta)	✓			
Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter	✓			
Let the Readiness Report Be Your Guide to Lightning Experience			✓	
View Page Performance by Browser and Other New Metrics in the Lightning Usage App		✓		
Change Your View with Display Density Settings	✓			
Say Goodbye to Copy and Paste and Hello to Quick Text	✓			
Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time	✓			
Find the Data You Need in a Jiffy with List View Search	✓			
Collaborate with Ease with List View Sharing	✓			
Use Background Utility Items to Add Functionality to a Lightning App		✓	✓	
Improve Your Salesforce Implementation with Optimizer			✓	
Use Multi-Select Picklists Easily in Lightning Experience	✓			
Open Hyperlinks in Formula Fields Correctly			✓	
Console				
Clean Your Slate with the Close All Tabs Keyboard Shortcut		✓	✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
External Objects Now Supported in Lightning Console		✓	✓	
Visualforce Overrides for Console Apps		✓	✓	
Navigation Items No Longer Open in Workspace Tabs by Default		✓	✓	
Generate Console URLs and Set Navigation Items with Lightning Console JavaScript APIs		✓	✓	
Streamline Your Workflow by Personalizing Your Navigation Items		✓	✓	
Create an Intuitive Workspace with Customizable Workspace Tab Titles and Icons		✓	✓	
Salesforce Surveys				
Gather Specialized Data with New Question Types	✓			
Add Multiple Questions to a Survey Page	✓			
Invite Person Accounts to Participate in Surveys	✓			
View a Person Account's Survey Invitations	✓			
View Status and Responses on Survey Invitations	✓			
Generate Survey Invitations Automatically				
Choose Whether Participants Must Log In to Take a Survey	✓			
Question Properties Menu Has a New Home	✓			
Editing Active Surveys Is No Longer Supported	✓			
Gather Data from Banking Customers with Salesforce Surveys in Financial Services Cloud			✓	
Pause... and Resume a Survey	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search				
Get More Relevant Search Results Without the Wait	✔			
Search and Filter Results in More Places	✔			
Filter Search Results for Custom Objects	✔			
Filter Search Results by Number Range	✔			
Find Messaging Sessions Using Global Search		✔		
Recover Your Unsaved Text After Getting Timed Out	✔			
Retention Limit for Field History Data Is Now Enforced	✔			
Support for IE9 and IE10 Is Ending	✔			
Cisco Spark Is Now Cisco Webex Teams	✔			

Lightning Essentials

Stay in the app to celebrate, set up, and subscribe to Salesforce Essentials with in-app Trailhead badging, improved setup flows and a new subscription page. In Sales Essentials, tackle more tasks with improved setup flows. In Service Essentials, create a self-service help center and use CTI to let agents make calls from their computers with a softphone.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Celebrate Learning with In-App Trailhead Badges	✔			
Manage Your Essentials Subscription Without Leaving Salesforce		✔		
Sales Essentials				
Create Custom Fields Fast			✔	
Delete Trial Data in a Jiffy			✔	
Sync Your Emails and Activities			✔	
Service Essentials				
Let Customers Be Self-Sufficient with Help Center			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use CTI in Service Essentials			✓	

Sales

Custom fields in Einstein Forecasting make Salesforce more intelligent. Measure sales performance with territory-based quotas and forecasts. Extend the world's No. 1 CRM to email and calendar via integration with Microsoft® and Google. Build recurring relationships with your customers with CPQ Evergreen Subscriptions. And get smarter marketing automation with Pardot in Lightning Experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Cloud Einstein				
Einstein Forecasting	✓			
Einstein Activity Capture	✓			
Einstein Readiness Assessor	✓			
Einstein Lead Scoring			✓	
Einstein Insights			✓	
Core Sales Features				
Collaborative Forecasts				
Forecast Sales by Territory (Generally Available)			✓	
Share Your Forecasts (Generally Available)	✓			
Get More from the Forecasts Page	✓			
Enterprise Territory Management			✓	
Accounts				
Add Multiple Account Team Members Faster in Lightning Experience	✓			
Include Partner Users on Account Teams in Lightning Experience	✓			
Campaigns				
Campaigns: Keep Pardot and Salesforce Campaign Members in Sync			✓	
Drill Into Your Campaign Related Lists with Quick Filters	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Email Templates Show Only Relevant Merge Fields	✓			
Focus on Leads and Contacts in the Merge Field Picker	✓			
Manage Salesforce Classic Email Templates a New Way in Lightning Experience	✓			
Use Attachments After Inserting Salesforce Classic Email Templates	✓			
Add Attachments to Lightning Email Templates	✓			
Lightning Dialer				
Record Your Dialer Calls			✓	
Make Dialer Calls with Your Business Phone			✓	
Einstein Activity Capture				
Customize Einstein Email Insights to Fit Your Business	✓			
Act on Einstein Email Insights	✓			
Leave Feedback About Einstein Email Insights	✓			
Reach Out to the Right People with Recommended Connections	✓			
Activities				
Include Reminders with Task Quick Actions			✓	
Save Sales Reps Time with Quick Text for Events and Tasks			✓	
Save Time with Persistent Activity Timeline Filters	✓			
Choose Which Activity Types Appear in the Activity Timeline	✓			
See Email Tracking and Bounce Information in the Activity Timeline	✓			
Filter by Task Subject in Global Search Results	✓			
Control Access to Activities			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Kanban				
Get the Kanban View for Recently Viewed Lists	✓			
Search for Records in the Kanban View	✓			
Calendar				
Schedule Event Series (Beta)			✓	
Customize Which Tasks You See on Your Calendar	✓			
Add and Remove Meeting Participants from Any User Interface	✓			
Sales Console				
Lightning Data: Match Selection, More Usable Labels				
Select a Match When the Automatic Match Isn't the Right One	✓			
Status Label Not Found Was Changed	✓			
Match Confidence Score Label Was Changed	✓			
Address Field Labels Were Changed	✓			
Integration with Google				
Lightning for Gmail: Increase Productivity with Inbox Beta for Gmail (Beta)			✓	
Lightning Sync for Google: Syncing for API-Triggered Updates and Flexible Sync Options				
Get More Flexibility with Event Sync and Edit Options	✓			
Sync Event Changes Made Through the API	✓			
Integration with Microsoft®				
Outlook® Integration				
Lightning for Outlook and Salesforce Inbox Combined into a Single Add-In			✓	
Increase Productivity with the Outlook Integration with Inbox (Generally Available)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Time and Improve Consistency with Text Shortcuts			✓	
Lightning Sync for Microsoft® Exchange®				
Sync Event Series Between Microsoft® Calendars and Salesforce			✓	
Sync Event Changes Made Through the API	✓			
Get More Flexibility with Event Sync and Edit Options	✓			
Lightning Sync Page in Setup Has a New Name		✓		
Salesforce for Outlook				
Salesforce for Outlook Not Available for Customers New to the Product			✓	
No Salesforce for Outlook Patches Planned			✓	
Reminder About Functionality Loss for Earlier Versions			✓	
Connect for Office	✓			
Salesforce CPQ and Billing				
Salesforce CPQ				
Set Up Salesforce CPQ Winter '19	✓			
Generate Subscriptions Without End Dates	✓			
Setting Price Rates for Usage-Based Products (Beta)	✓			
Price Percent of Total Products Based on the Entire Bundle	✓			
Order Fields Pre-Populated in Lightning			✓	
Use the Improved Rich Text Editor	✓			
Salesforce Billing				
Upgrading to Salesforce Billing Winter '19	✓			
Payment Gateway: Tracking Gateway Responses and Refunding Failed Payments	✓			
Revenue Schedule: Revenue Adjustments and Revenue Amount Fields	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Sub-Invoice Lines for Billing Transactions	✓			
Cancel Order Products Using Invoice Plans	✓			
Pardot				
Align Sales and Marketing on a Single Platform with Pardot in Lightning Experience (Generally Available)			✓	
Easily Opt In Opted-Out Prospects Synced to Salesforce			✓	
Convert Engagement Programs to Allow Repeat (Beta)			✓	
Filter Engagement Studio Canvas by Date	✓			
B2B Marketing Analytics Dashboards Changed	✓			
Create Salesforce Campaign Members from Prospects			✓	
Pardot UI Gets a Mini-Makeover	✓			
Use Engage for Gmail Extension with the New Gmail UI	✓			
Enable Operational Email			✓	
Run a Full Sync Without Contacting Pardot Support		✓		
Let Prospects Repeat Engagement Programs	✓			
Copy and Paste to Build Engagement Programs	✓			
Notification Banner Permission Changes	✓			
Bot Clicks Filtered from Pardot Actions and Reports	✓			
Send Engage Campaigns from More Places			✓	
UI Improvements in the Pardot Lightning App	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Sent Automated Emails				

Service

Enjoy a cornucopia of new features to help bring your customer service to the next level. LiveMessage in Lightning Experience lets you engage with customers on top messaging channels from the Lightning Service Console. With Help Center, create a help site to share Knowledge articles and let customers log cases for issues that require human intervention. In Lightning Flow for Service, view completed steps in the Guided Action History and alert agents to required steps. Share dispatching responsibility with your field service contractors by giving them access to the dispatcher console from a community. Finally, power your Einstein bots to do more for your customers with process automation flows.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Bots				
Supercharge Your Bot with Autolaunched Flows—No Coding Required				
Analyze Einstein Bots Sessions Easily and More Deeply				
Define Bot Question Elements Differently with Slots Renamed to Variables				
Train Bots More Easily with a Unified Intent Set Across All Bot Versions				
Build Intents Quickly by Adding Customer Inputs with the Data Loader				
Understand Your Customers More Quickly—Einstein Bots Support Literal Matches				
Channels				
LiveMessage				
Support Your Customers with Text Messaging and Facebook Messenger				
Set Up LiveMessage with a Guided Setup Flow				
Set Customer Expectations with Automated Response Messages				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize Automated SMS Opt-In and Opt-Out Messages		✓		
Keep Customers in the Know with Automatic Text Message Notifications			✓	
Send and Receive Images and File Attachments with SMS Text Messaging and Facebook Messenger	✓			
Help Center			✓	
CTI				
Use CTI in Service Essentials			✓	
Increase the Size of Your Open CTI Softphone			✓	
Live Agent				
Access Live Agent Setup Pages in Lightning Experience		✓		
Customize the Live Agent Session Page in Lightning Experience		✓		
Use Skills-Based Routing to Route Chats in Live Agent (Beta)			✓	
Use a Button to Insert Quick Text into Your Chats	✓			
Snap-Ins Chat				
Make Each Snap-In Your Own with Custom Labels			✓	
Add Code Snippet Settings to Your Communities Snap-Ins			✓	
Get Chat Event Notifications from Snap-Ins Chat			✓	
Roam Freely and Chat Across Multiple Tabs	✓			
Take Advantage of Improvements to Live Agent		✓		
Snap-Ins for Mobile Apps			✓	
Social Customer Service				
Support Your Customers on YouTube	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Respond to Social Posts Without Creating a Case	✓			
Show Your Emotions with Emoji	✓			
Keep It Private on Facebook	✓			
Use the Compact Feed for Social Posts	✓			
Get Your Agents Ready for Lightning Experience	✓			
Support Your Government Partners in the Public Cloud	✓			
Upgrade Your Social Customer Service Package	✓			
Field Service				
Point Your Workforce to the Next Step with Lightning Flow for Service			✓	
Generate Service Reports in Other Languages			✓	
Transfer Serialized Product Items (Beta)				✓
Write Service Report Triggers			✓	
Quickly Find Signed Service Reports			✓	
Automatically Share Service Appointments and Work Orders			✓	
View Related Product Transfers on Locations and Product Items			✓	
User Profile Image Storage on Android			✓	
Field Service Managed Package				
Let Partners Dispatch from Communities			✓	
Color-Code the Gantt			✓	
Add Custom Actions to the Dispatcher Console			✓	
Customize the Gantt Utilization View	✓			
Do More with Custom Appointment List Filters	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Resource Absences on the Dispatcher Console Map			✓	
Book Appointments More Easily			✓	
Choose When Appointments Appear on the Gantt			✓	
Turn Off the Chatter Post for Emergency Appointment Dispatch			✓	
Other Improvements to the Field Service Lightning Managed Package	✓			
Case Management				
Service Console				
Switch to Lightning Experience Directly from Your Salesforce Classic Console App	✓			
Lightning Flow for Service				
Identify Status Quickly Using the History Tab on the Guided Action List			✓	
Focus Your Agents with a Subset of Guided Actions			✓	
Warn Agents When a Guided Action Is Mandatory			✓	
Cases				
Embed Images into Case Emails in Lightning Experience			✓	
Enjoy the Compact Case Feed Everywhere in Lightning Experience	✓			
Work More Efficiently in Your Case Feed in Lightning Experience	✓			
Use Visualforce Email Templates in Lightning Experience	✓			
Share and Preview Files By Automatically Saving Email-to-Case Attachments as Salesforce Files	✓			
Set Audit Fields When Importing Emails		✓		
Fight Spam—Reject Cases Without reCAPTCHA Verification			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Omni-Channel				
Route Work to Agents Using Both Queues and Skills Simultaneously in the Same Org			✓	
Use Skills-Based Routing to Route Chats in Live Agent (Beta)			✓	
Keep an Eye on Agent Workload for Both Queue-Based and Skills-Based Routing in Omni-Channel Supervisor	✓			
Let Supervisors Monitor Chats in Real Time in Omni-Channel Supervisor			✓	
Give Supervisors a Sneak Peek into What Agents and Customers Are Typing in Chats			✓	
Productivity				
Share and Organize Macros and Quick Text in Folders			✓	
Click Away—Insert Quick Text into Your Emails with a Button	✓			
Use Quick Text in Tasks and Events	✓			
Insert Quick Text in Knowledge Articles and Chat	✓			
Never Forget Quick Text Again Thanks to a Popup Button	✓			
Service Cloud Mobile				
Work in Your Org's Language with Mobile Localization	✓			
Communicate Intuitively with Mobile Mentions	✓			
Customize Quick Actions with Page Layouts (Android)	✓			
Post Files to the Case Feed (Android)	✓			
Knowledge				
Lightning Knowledge Is Included in Service Essentials				✓
Map Case Fields to Data Categories for Better Search Results			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More Done on Article List Views with Mass Actions			✓	
Insert Anchor Links in Rich Text Fields to Help Readers	✓			
Customize Articles with Actions, Buttons, and Links (Beta)			✓	
Add Lookup Fields to Article Versions from Various Records			✓	
Do More from the Articles Related List on Cases	✓			
Customize Global Search to Find the Most Relevant Knowledge Data			✓	
Import Articles with Translations to Leave No Languages Behind			✓	
Move More to Lightning Knowledge—Communities Topics and Article Search Data (Beta)			✓	
Translate Articles Faster with Helpful Links in Emails and Evenly Spaced Columns on Pages			✓	
Access Smart Links in Articles from the Salesforce App	✓			
Stay in Lightning Knowledge to Insert Article Content into Emails	✓			
Use Quick Text in Your Knowledge Articles			✓	
Setup Flows		✓		

Analytics

Drive decisions with insights from reports and dashboards and Einstein Analytics. Drill down in Lightning Experience reports to get the details behind the numbers. Create Einstein Analytics assets with templates, enhanced sharing security, file-based data connectors, and much more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reports and Dashboards				
Reports				
Einstein Data Insights: Learn More from Your Reports (Generally Available)	✓			
Edit Joined Reports with Lightning Report Builder (Beta)			✓	
Enjoy a Better Interface with Enhanced Run Page (Beta)	✓			
Draw Insights Quicker by Drilling into Your Data	✓			
Choose the Currency for a Report			✓	
Role Hierarchy Filter Requires a Role Selection	✓			
Dashboards				
Add Up to 50 Values to Each Dashboard Filter	✓			
Set Decimal Precision in Dashboard Charts and Tables	✓			
Customize Axis Ranges on Dashboard Charts	✓			
Use Joined Reports as Source Reports for Dashboard Components	✓			
Subscriptions and Search and Folders				
Quick Search: Find Reports, Dashboards, and Folders Fast	✓			
Report and Dashboard Folder Enhancements	✓			
Other Reports and Dashboards Enhancements	✓			
Einstein Analytics				
Onboarding and Getting Started				
Ease into Analytics with Welcoming Introductory Resources	✓			
Learn in Context with In-App Videos	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access the Learning Adventure App within Analytics Studio		✓		
Expedite Data Visualization with Conversational Queries (Generally Available)			✓	
Navigate Your Analytics Apps More Easily from Menus	✓			
Share Links That Open in Analytics Tab or Studio	✓			
Additional Enhancements Across Analytics	✓			
App Building				
Explore Data from Multiple Datasets in a Single Lens	✓			
Add Date Filters Faster	✓			
Rename the Count of Rows Label	✓			
Dates and Date Parts Stay Together	✓			
Add Your Own Maps to Analytics with a Few Clicks	✓			
Hide Null Values in a Chart Tooltip	✓			
Smart Dashboard Templates Create Ready-Made Dashboards from Existing Datasets	✓			
Hide Widget Actions from Dashboard Viewers	✓			
Plan for Classic Designer's Retirement	✓			
Look into the Future with the SAQL Timeseries Function	✓			
Fill Missing Dates in a Data Stream with the SAQL Fill Function	✓			
Give Communities Users Analytics Insights Under the New License		✓		
Manage the Complete Lifecycle of Analytics Apps with the CLI Analytics Plug-in		✓		
Track Adoption of Einstein Analytics		✓		
Other Enhancements in App Building	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Prebuilt Templates and Apps				
App Templates Show You What Einstein Analytics Can Do for You		✓		
Find the Analytics App You Want to Create Fast with the New Template Picker		✓		
New Analytics Templates: Analyze Data from Multiple Orgs in Sales App, Get Instant Insights into B2B Commerce Metrics		✓		
Pricing, Subscription Templates Take Salesforce CPQ Analytics to a New Level		✓		
The Lead Change Analytics Template Helps You Convert Leads to Business		✓		
The Approval Analytics Template Gives You Instant Insight into Your Approval Processes		✓		
Veeva CRM Customers: Visualize Sales Processes and Performance With Salesforce Analytics for Veeva Template		✓		
Retail Banking Template For Financial Services Cloud Customers Helps Deepen Customer Relationships and Attract New Clients		✓		
Data Integration				
Replication is Now Called Data Sync		✓		
Load and Append Multiple CSV Files with the Amazon S3 Connector		✓		
Avoid Data Drift with Periodic Full Sync		✓		
Trigger Sync for External Data When You Run a Dependent Dataflow		✓		
Bring in More Data Through Google Big Query and Heroku Connections			✓	
Create Datasets from One Place		✓		
Do More from the Dataset Edit Page		✓		
Fast-Track Your Data from a CSV File to a Lens, Recipe, or Story		✓		
Run More Data Jobs		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Navigate Recipe Columns with Ease in the Columns Tab		✓		
Search No More for the Column Profile in the Recipe Editor		✓		
Add Data Faster in the Recipe Editor		✓		
Share More Sharing Settings in Einstein Analytics			✓	
Mobile Apps				
Experience Dynamic Pages and Conditional Formatting on Einstein Analytics for iOS and Android	✓			
Additional Enhancements in Einstein Analytics for iOS	✓			
Additional Enhancements in Einstein Analytics for Android	✓			
Einstein Discovery				
Create Einstein Discovery Stories from Einstein Analytics Datasets	✓			
Navigate Einstein Discovery Stories and Insights in the Einstein Analytics Interface	✓			
Manage Einstein Discovery Goals and Models Deployed to Salesforce	✓			
Improve Your Einstein Discovery Models by Investigating Their Metrics and Performance	✓			

Communities

Communities elves have been hard at work this release, bringing amazing features and improvements. Your community members can finally have actual conversations using threaded discussions. Recognition badges help motivate community members and drive adoption. Guest community users can use flows to do a host of things in a community without logging in. And your customer support can help customers help themselves by quickly setting up a knowledge base community using the new Help Center template. All this and a host of new components, security features, and general improvements to keep your community implementations buzz-worthy.

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update Your Lightning Community to the Latest Template			✓	
Create a Self-Service Help Center and Turn Customers into Search Heroes			✓	
Discover CMS for Community Cloud (Beta)			✓	
Koa and Kokua Go Off into the Sunset	✓			
Use Audience Targeting Enhancements		✓		
Export Themes, Just like Whole Sites and Pages			✓	
Do More with Themes and Added Options	✓			
Edit Most Page URLs	✓			
Validate Head Markup as You Type	✓			
Lightning Components in Community Builder				
Filter Search Results in Communities			✓	
Enjoy the Give and Take of Discussions in Your Feed		✓		
Allow Guest Users to Access Flows (not immediately available)		✓		
Block Deletion of Threads in Communities				✓
Use Rich Publisher Apps on Your Mobile Devices		✓		
Let Users Add Topics to Records		✓		
Do More with Topics from the List View		✓		
Add Topics to Your Original Content (Beta)		✓		
Display Related Lists with More Precision	✓			
Suggest Actions and Offers to Community Members (Pilot)				✓
Show Salesforce IoT Data to Community Users			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize Actions on the User Profile Component			✓	
Use More Snap-Ins Chat Features in Your Community			✓	
Allow Field Service Dispatching from Lightning Communities			✓	
Save Time with New Global Actions for Communities			✓	
See Field Dependencies While Editing a Record Details Page	✓			
Update Subtopic Elements on Headline Component in Your Community			✓	
Search and Share List Views and Filter Campaign Related Lists	✓			
Community Engagement				
Keep Members Engaged with Recognition Badges (Generally Available)		✓		
Display Recognition Badges on User Profiles			✓	
Award Recognition Badges with the New Give Badge Button			✓	
Use the Questions With and Without Answers Report to See Your Community in Action			✓	
Files in Lightning Communities				
Ensure Access to Documents with Proper Permissions			✓	
Make Changes to File Fields When You Need To	✓			
Populate Custom Fields When Uploading Files	✓			
Share Folders Using Public Links	✓			
Ensure Access to Documents with Proper Permissions			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Partner Central				
Drive Data Sharing in a Multi-Tier Distribution Channel with Partner Relationships (Pilot)	✔			
Manage and Share Brand Information and Include It in Co-Branded Email Templates (Generally Available)			✔	
Encourage External Delegated Admins to Manage Their Teams (Generally Available)			✔	
Require Unique Usernames for Partners at the Org Level	✔			
Ignore the Rules and Allow Greater Flexibility with Budgets	✔			
Control Community User Visibility (Beta)			✔	
Include Partner Users on Account and Opportunity Teams in Lightning Experience	✔			
Sharing and Security				
Improve Security for Sites and Communities by Restricting Record Access for Guest Users			✔	
Limit Guest User Access to Activities			✔	
Use Sharing Sets with All Customer and Partner Licenses (Generally Available) (available within 24 hours after the release)		✔		
Use Sharing Sets with Contacts with Multiple Accounts (Beta)			✔	
Use Sharing Sets with Campaigns, Opportunities, and Orders (Beta)				✔
Use the New Content Security Policy to Better Protect Your Community	✔			
Enhance Your Community Privacy with Google IP Anonymizer			✔	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Secure iframes with Clickjack Protection on Sites and Communities			✓	
Enable Users to Log In with Their Email, Phone Number, or Any Identifier You Choose		✓		
Allow Visitors to Join Your Community by Email or Phone		✓		
Customize the One-Time Password Email Template for Identity Verification		✓		
Give Internal Users Login Access to Communities Through an External Authentication Provider			✓	
Set Different Login Policies for Internal Community Users (Generally Available)		✓		
Usability and Performance Improvements				
Dependent Picklists No Longer Have a Default Value Selected	✓			
Guest Users Are Redirected to a Login Page When Visiting Record Pages	✓			
Get Faster Page Response with Support for Optional URL Query Parameters	✓			
Decrease Page Load Times with Community Content Delivery Network (Generally Available)		✓		
Communities Documentation	✓			
Other Changes in Communities				
Use Lightning External Apps and Lightning External Apps Plus Licenses to Create Custom Digital Experiences		✓		
Find All the Community Content Features in One Workspace Location	✓			
Better Place for Time in Feeds	✓			
Provide Your High-Volume Community Users with Access to Data Privacy Records		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time	✓			
Give Guest Users Permission to Create Surveys and Ideas				
Manage Customer User Permission Has Been Removed from All Standard Profiles	✓			

Chatter

Automatically save your posts as drafts as you're composing. Now when you post, the cursor moves to the text body instead of the To field so you can start writing your post right away.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Save Your Chatter Posts as Drafts	✓			
Cursor Focus in Chatter Publisher Has Changed	✓			

Files

Use public links to share folders, so you can deliver collections of files to your employees, partners, customers, and prospects. Access file details on the go with mobile file detail pages.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Share Multiple Files in a Folder Using Public Links	✓			
Go Mobile with the File Detail Page				✓
Track File Stats with the File Engagement Card	✓			
Other Changes in Files				
Ensure Access to Documents with Proper Permissions			✓	
Integrate Quip and Salesforce Classic			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Content Delivery Daily Limits Increased	✓			
Folders Enabled for All New Libraries	✓			
Content Delivery Search Bar Has Changed	✓			
View Content Previews from the File Detail Page	✓			
Full Previews No Longer Available Without Files Tab	✓			
Multi-File Upload Not Available for Microsoft Internet Explorer Versions 9 and 10	✓			

Mobile

Check out the latest features for getting more done no matter where you are.

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	✓			
Manage Territory Account Assignment on the Go	✓			
Find Your Territories' Opportunities on the Go	✓			
Include Partner Users on Account and Opportunity Teams	✓			

Financial Services Cloud

Standardize customer engagement processes with Action Plans task templates. Find out what's on customers' minds with Salesforce Surveys. Give bankers a more holistic view of customers with the Commercial Banking Console Lightning app. And help customers help themselves with Einstein Bots for Financial Services Cloud. Plus, accelerate data insert and update operations with the enhanced rollup framework in Financial Services Cloud.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans			✓	
Gather Customer Insights with Salesforce Surveys			✓	
Get a More Holistic View of Customers with Commercial Banking			✓	
Help Customers Help Themselves with Einstein Bots			✓	
Enhance Rollups		✓		
Financial Services Cloud Has New Objects		✓		
New Financial Services Cloud Object Fields		✓		

Health Cloud

Health Cloud now supports seamless collaboration among healthcare providers and payers. Providers can submit and track requests for authorization, and payers can process requests to make sure patients get the right care, at the right time, in the right place. And we've added new Lightning components to make it easier to build your own custom record pages for your users.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver More Personalized and Appropriate Care with Utilization Management			✓	
Unify Membership, Benefits, and Preauthorizations with the Health Insurance Data Model			✓	
Access External Insurance Claims Data			✓	
Be More Efficient with Patient Card Usability Improvements	✓			
Health Cloud Has Reached the Finnish Line	✓			
Protect Health Cloud Data with Platform Encryption				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Health Cloud Objects		✓		
Changed Health Cloud Object		✓		
New and Changed Health Cloud Lightning Components		✓		

Customization

Continue making your org smarter with the Einstein Next Best Action pilot. Make your Lightning pages more dynamic and more useful with a new component visibility rule parameter and new components. Beef up your flows with a host of new screen components, expanded limits, and the ability to deploy flows and processes as active.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Next Best Action: Recommend Actions and Offers Using Strategies (Pilot)				✓
Predict What's Next in Your Business with Einstein Prediction Builder (Beta)			✓	
Lightning App Builder				
Set Component Visibility Based on Standard and Custom User Permissions		✓		
Edit Managed Apps with the Lightning App Builder		✓		
Suggest Actions and Offers to Your Lightning Experience Users (Pilot)				✓
Add the Text Shortcuts Component for Email Application Panes			✓	
Updated Labels in the App Creation Wizard and the Lightning App Builder		✓		
Better Labels for Form Factors in Component Visibility Rules		✓		
Show Users Salesforce IoT Data with the IoT Insights Lightning Component			✓	
Lightning Components No Longer Auto-Added to Pages		✓		
Lightning Flow				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automate More Business Processes with Increased Per-Org Limits	✓	✓		✓
Monitor Your Processes and Flows with New Usage-Based Entitlements		✓		✓
Process and Flow Design				
Screen Components		✓		
Remember Previously Entered Values in Flow Screen Components		✓		
Avoid Creating Multiple Record-Change Processes for an Object		✓		
Add Validation Functions to Custom Screen Components		✓		
Extend Flows with Third-Party Systems and Apps Using Flow Solutions on AppExchange		✓		
Flow Distribution				
Use Strategies to Recommend Flows to Users and Community Members (Pilot)				✓
Allow Community Guest Users to Access Flows		✓		
Launch Flows in Standard Navigation Apps with Lightning Flow for Service			✓	
Use Autolaunched Flows in Einstein Bots—No Coding Required		✓		
Deploy Active Processes and Flows Using Change Sets or Metadata API			✓	
Version Numbers Are Omitted from Flow File Names in the API			✓	
Track Process and Flow Test Coverage		✓		
Data Protection and Privacy				
Manage Duplicate Data Privacy Settings Records with the Individual Object		✓		
Provide Your High-Volume Community Users with Access to Data Privacy Records		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Discover Preferences for Consent Across Multiple Records			✓	
AppExchange				
Find What's Best for Your Business with Recommended AppExchange Solutions	✓			
Focus Your AppExchange Search Results with Filters	✓			
General Setup				
Check a Field's References Before You Edit It (Pilot)				✓
Find Import and Integration Products in a New Setup Page	✓			
See Approval Requests Assigned to Your Queues in All Salesforce Experiences	✓			
Select Multiple Page Layout Assignments in macOS with Command Click		✓		
Enable Japanese Imperial Calendar in Lightning Experience			✓	
Use PATCH in Your External Service Schema		✓		
Add a Namespace Prefix to pageReference.state Properties and Query Parameters			✓	

Security and Identity

Your community members and other external users can now use an email address or a phone number to log in or sign up, and with single logout, you can identify which user sessions to end. You can encrypt many more fields and control who can change encryption policies. The new transaction policy wizard makes creating transaction security policies faster and easier. And your users are safer with alerts that warn them before they are redirected from Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Authentication and Identity				
Login Discovery		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configurable Self-Registration		✓		
Backgrounds for Login Pages		✓		
Identity Verification Emails		✓		
SMS Messaging Add-On License				✓
Direct Internal User Authentication to Communities			✓	
OpenID Connect Authentication for Mulesoft			✓	
OAuth 2.0 Endpoints (Beta)				✓
Lightning Experience App Launcher	✓			
SCIM 2.0		✓		
SAML Session Index Support			✓	
JSON-Compliant Values in Endpoints and Tokens		✓		
Login Policies (Generally Available)		✓		
Salesforce Shield				
Shield Platform Encryption				
Custom Object Name Fields			✓	
Welcome Shield Platform Encryption to Health Cloud			✓	
Rich Text Area Fields (Beta)			✓	
Contract Shipping Address Fields			✓	
Shield Key Management Service Protections			✓	
Change Data Capture (Generally Available)			✓	
Control Who Can Change Encryption Policies			✓	
Change Sets		✓		
Tenant Secret Statuses and Schemes			✓	
Cache-Only Key Service (Beta)			✓	
Matching Rules (Generally Available)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Event Monitoring				
Transaction Security Policies		✓		
Track Analytics Dashboard Requests in Your Event Log Files		✓		
Event Monitoring Setup Tree		✓		
Lightning Error Logs		✓		
Einstein Analytics Classic Designer Dashboards Are Retiring	✓			
Other Security Changes				
Platform Integration User		✓		
Session Security Policy			✓	
Warn Before Redirect			✓	
Server Cipher Suite		✓		
Instanceless My Domain URLs			✓	

Salesforce IoT

Salesforce IoT has innovations to help you create unique and memorable customer experiences. You can add your Salesforce IoT data on any page in Salesforce with our new IoT Insights Lightning component. New troubleshooting features let you send event messages inside the app and view the messages as they are received. We're also making contexts easier to use and improving trackers.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights			✓	
Easily Send Event Messages from Inside Salesforce IoT			✓	
Verify That Event Messages Are Received with Event Viewer			✓	
Create and Manage Contexts Better with Validation and Activation Enhancements			✓	
Get More Troubleshooting Data with the Enhanced Activity Log			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Include IoT Components in a Managed Package			✓	

Development

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to the Salesforce Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				
Stricter Content Security Policy (CSP) Changed from a Critical Update to an Org Setting			✓	
Freeze JavaScript Prototypes for Improved Security and Stability			✓	
Enable CDN to Load Lightning Experience Faster			✓	
Mark Apex Methods as Cacheable		✓		
Token Changes for Formatting Dates in JavaScript API Methods		✓		
Locker API Viewer in the Component Library		✓		
Evaluate and Benchmark JavaScript Code with Locker Console		✓		
Removed moment Global Variable		✓		
Use Lightning Data Service in More Containers		✓		
New and Changed Lightning Components		✓		
Changed Lightning Interfaces		✓		
Visualforce				
Create and Edit Field Sets in Lightning Experience		✓		
New Visualforce Access Metrics Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Securely Retrieve and Display Third-Party Images in Visualforce Pages				
Improve Security by Isolating Untrusted Third-Party Content with iframes				
URL Redirect Parameters Are No Longer Case-Sensitive				
Apex				
Opt In to Fire Platform Events from Batch Apex Classes (Beta)				
Use Inherited Sharing to Secure Your Apex Code				
Streamline API Calls to Your Org from Apex Code				
Share Extensible Functionality with the Callable Interface				
Apex: New and Changed Classes and Interfaces				
Changed Apex Classes				
Changed Apex Enum				
New Apex Exceptions				
New Apex Interfaces				
Changed SOAP API Calls for Apex				
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				
Get Metadata Coverage Status for More Channels, Known Issues, and Sample Scratch Org Definitions				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable Access to Metadata Without Enabling Access to Data, Too (Beta)				
Deploy Using REST		✓		
New Change Set Component		✓		
Tooling API				
Tooling API New and Changed Objects		✓		
Metadata API		✓		
		API		
New and Changed Objects				
New Objects		✓		
Changed Objects		✓		
SOSL		✓		
REST API				
New and Changed Calls		✓		
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				
Changed Resources		✓		
User Interface API				
Change the Density of the User Interface		✓		
Other User Interface API Changes		✓		
Quick Action JavaScript API				
Salesforce Console API		✓	✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Open CTI API		✓		
Custom Metadata Types				
Reference Custom Metadata Types in Advanced Formula Fields		✓		
Instantiate Custom Metadata Types in Apex		✓		
Salesforce Extensions for VS Code				
Develop Against Any Org in Visual Studio Code (Beta) (not immediately available)			✓	
Debug All Your Orgs for Free with Apex Replay Debugger (Generally Available) (not immediately available)			✓	
Explore Your Apex Tests in Visual Studio Code (not immediately available)			✓	
Salesforce CLI (not immediately available)				
Build Your Own Salesforce CLI Plug-In to Get Just What You Need (Generally Available)		✓		
Sandboxes				
Include Asset Files in Full Sandbox Tests		✓		
Developer Hub (not immediately available)		✓		
Scratch Orgs				
Configure Scratch Orgs with New Features		✓		
Set Allocations and Limits for Scratch Org Features		✓		
Consult the Metadata Coverage Report for Source Tracking Support		✓		
Get More Configuration Options with Scratch Org Settings		✓		
Packaging				
Patch Version Numbers in Unlocked Packages Are Supported		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Extract Dependency Information for Unlocked Packages		✓		
More Metadata Components Are Hard-Deleted in Unlocked Packages		✓		
Enable Migration of Deprecated Metadata in Unlocked Packages		✓		
Lock Down Information During Installation of Installation-Key-Protected Unlocked Packages		✓		
Adopt Instanceless My Domain URL Best Practices		✓		
Enterprise Messaging				
Scale Your Event-Based Apps with High-Volume Platform Events (Generally Available)		✓		
Receive Streaming Events in Your Lightning Component		✓		
Keep Your External Data Up to Date with Change Data Capture (Generally Available)		✓		

Supported Browsers

We made it easier to find what you need in our supported browsers documentation. Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience. As of April 5, 2019, we no longer support Internet Explorer 9 and 10. You can continue to access these browsers, however, Salesforce will not provide support for issues that you encounter using them.

IN THIS SECTION:

[Supported Browsers for Lightning Experience](#)

See the supported browsers and limitations for Lightning Experience.

[Supported Browsers for Salesforce Classic](#)

Salesforce Classic supports Microsoft® Internet Explorer® versions 9 and 10 (support for 9 and 10 ends on April 5, 2019), 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.

[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 Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer 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 Communities	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Special setup considerations?	No	No	No	No	No
Limitations?	Yes	Yes	No	Yes	Yes



Note: The term "latest" is defined by the browser vendors. Check with your browser vendor to determine the latest version available.

Supported Browsers for Salesforce Classic

Salesforce Classic supports Microsoft® Internet Explorer® versions 9 and 10 (support for 9 and 10 ends on April 5, 2019), 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.

Where: Salesforce Classic is available in all editions.

 **Note:**

- We will no longer support Internet Explorer 9 and 10 as of April 5, 2019. We recommend moving to a supported browser, such as Chrome, Firefox, Safari, Edge, or Internet Explorer version 11. After April 5, 2019, you can continue to access Salesforce Classic using IE9 and IE10. However, Salesforce will not provide support for issues that you encounter using these browsers.
- 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 11 (support for IE 9 and 10 ends on April 5, 2019)	Latest	Latest	Latest	11.x+
Salesforce Console	IE 11 (support for IE 9 and 10 ends on April 5, 2019)	Latest	Latest	Latest	No
Special setup considerations?	Yes	No	No	Yes	No
Limitations?	Yes	Yes	No	No	Yes

 **Note:**

- The term "latest" is defined by the browser vendors. Check with your browser vendor to determine the latest version available.
- 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: More Ways to Adopt Lightning Experience and Boost Productivity

We introduce new ways to ease and encourage users to transition to Lightning Experience. Also, get insight into why users are switching back to Salesforce Classic with a new feedback form. Personalize your view in Lightning Experience with display density controls. Fast track your communication with predefined quick text messages in emails, tasks, events, and chats. Search within list views, and share your favorite list view with your team. Check out the ways that we bolstered surveys, search filters, and Lightning console apps. And that's only half of it.

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? Give them the resources they need the first time they log in to Lightning Experience with a new welcome mat. Gain insight into potential issues by using a feedback form when users choose to switch back to Salesforce Classic. Or, keep the entire org in Lightning Experience by removing the ability to switch back. As always, run the Lightning Experience Readiness Check to learn how changes impact your Salesforce implementation.

[Change Your View with Display Density Settings](#)

Two new Lightning Experience display density settings give you more control of how you want to view data without changing the page layout. Select one of the settings as the default, but users can choose their own display density at any time from the user profile menu.

[Say Goodbye to Copy and Paste and Hello to Quick Text](#)

Copying and pasting content is time consuming and tedious. Quick text is fast and easy—you can insert predefined messages into emails, tasks, events, chats, and more. To make quick text easier to use, we added more ways to insert quick text. Use a keyboard shortcut, a button in rich-text editor toolbars, like for email publishers, or a popup button next to supported text fields.

[Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time](#)

Use the Change Owner page-level button to assign a new owner for up to 200 selected leads, cases, or custom objects. You can access the button in the page-level action menu in a list view or related list in standard table mode, or in Related List Quick Links.

[Find the Data You Need in a Jiffy with List View Search](#)

Use the new search bar to search the field data in your list views and find the records you need in record time.

[Collaborate with Ease with List View Sharing](#)

Have a list view with an amazing set of filters that you'd love to share with your team? Or maybe you have a list view that you only want a select few to access. Take collaboration to the next level by sharing your list views with user groups in your org.

[Use Background Utility Items to Add Functionality to a Lightning App](#)

Background utility items run without a visible entry in the utility bar. They provide an unobtrusive way to add functionality to your Lightning apps without cluttering the user experience.

[Improve Your Salesforce Implementation with Optimizer](#)

Run the Salesforce Optimizer to determine how your company uses certain Salesforce features, and then identify ways that you can improve your implementation for your company. Salesforce added Disable Debug Mode and Details Tab to the Record Pages sections and updated the top success resources.

[Use Multi-Select Picklists Easily in Lightning Experience](#)

When you edit records in Lightning Experience, multi-select picklists now behave like in Salesforce Classic.

[Open Hyperlinks in Formula Fields Correctly](#)

This critical update addresses an issue opening hyperlinks in formula fields. If you have formula fields that contain a `HYPERLINK` function, Lightning Experience currently ignores the target value when attempting to open the link. This critical update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This critical update is automatically enabled in Summer '19 on May 17, 2019.

[Lightning Console Apps: Customizable Tabs, Customizable Navigation Items, More APIs, and Visualforce Overrides](#)

Make console your own with customizable tab titles, tab icons, and navigation items. You can also generate and open console URLs, and set your navigation item with the Lightning Console JavaScript API. Visualforce override support in console apps allow you to leverage your Visualforce overrides in Salesforce Classic.

[Salesforce Surveys: More Control to Gather the Data You Need](#)

Salesforce Surveys gives you new question types, more options to view related information, and an improved experience for participants.

[Search: Relevant Results in Real Time and More Ways to Filter Results and Search](#)

Objects you interact with get an instant boost in search results. Filter search results in more ways and in more places. A new object is searchable.

[Recover Your Unsaved Text After Getting Timed Out](#)

Sometimes your Lightning Experience session is interrupted, whether you've been inactive too long or you lost your connection. You used to see the same timeout message, regardless of how your session ended. Now the message that pops up is specific to your scenario and tells you how to recover unsaved text.

[Retention Limit for Field History Data Is Now Enforced](#)

Salesforce guarantees to retain your field history data for up to 18 months through your org, and up to 24 months via the API. To ensure high availability of data and accommodate the fast-growing data needs of our customers, up until now, we haven't enforced the 18-month retention policy. Starting with Winter '19, you can access data older than 18 months only in a limited fashion via Data Loader or the API. In Spring '19, you can access field history data up to 24 months old via Data Loader or the API, but we begin the process of removing field history data older than 24 months.

[Support for IE9 and IE10 Is Ending](#)

We will no longer support Internet Explorer (IE) 9 and 10 starting on April 5, 2019. We recommend that you move to a supported browser, such as Chrome, Firefox, Safari, Edge, or IE 11. After April 5, 2019, you can continue to access Salesforce Classic and Salesforce Tabs + Visualforce Communities using IE9 and IE10. However, Salesforce won't provide support for issues that you encounter using these browsers.

[Cisco Spark Is Now Cisco Webex Teams](#)

Cisco Webex Teams™ for Salesforce reflects the new Cisco Webex (formerly Cisco Spark) branding. Look for the new names and icons in the app and the help.

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](#).

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? Give them the resources they need the first time they log in to Lightning Experience with a new welcome mat. Gain insight into potential issues by using a feedback form when users choose to switch back to Salesforce Classic. Or, keep the entire org in Lightning Experience by removing the ability to switch back. As always, run the Lightning Experience Readiness Check to learn how changes impact your Salesforce implementation.

IN THIS SECTION:

[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.

[Keep Users in Lightning Experience](#)

Ready to adopt Lightning Experience for your org? Keep all users who have the Lightning Experience permission in the new interface by removing their ability to switch to Salesforce Classic.

[Guide Your Users' Transition to Lightning Experience with Change Management Resources](#)

Addressing the human aspect of change is crucial to successful Lightning Experience adoption. The Lightning Experience Transition Change Management Hub guides you through best practices for managing change during each phase of your Lightning Experience transition. Take advantage of tools and templates to ensure the smoothest transition possible for your users.

[Move Actions and Buttons Easily When Transitioning to Lightning Experience \(Beta\)](#)

Don't have time to move all your Salesforce Classic actions and buttons into Lightning Experience? The latest Lightning Experience Configuration Converter feature does just that in a simple, easy to understand wizard. Select the objects and page layouts to work on, and Salesforce does the heavy moving. The Lightning Experience Configuration Converter, which was made generally available during Summer '18, has been enhanced. Easily move custom, standard, and global actions from the Quick Actions in the Salesforce Classic Publisher section of a page layout to the Salesforce Mobile and Lightning Experience Actions section. Also included the right mobile actions and move custom and standard buttons along the way.

[Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter](#)

To make converting JavaScript buttons even smoother, Salesforce updated the Lightning Experience Configuration Converter. More objects are supported, the settings interface is easier, and detail page links are converted into links, not buttons.

[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 Winter '19 include direct links to the Lightning Experience Configuration Converter and the Visualforce Report. You also get new sections on the number of lookup fields on page layouts and My Domain. Plus, updated information about ROI.

[View Page Performance by Browser and Other New Metrics in the Lightning Usage App](#)

You can now view more metrics in the Lightning Usage App, including page performance by browser. You can also generate reports using the Lightning Usage App objects.

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 was made available on August 16, 2018. The welcome mat started appearing to users the first time they log in to Lightning Experience 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.

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: Lightning Experience Welcome Mats \(can be outdated or unavailable during release preview\)](#)

Learn Why Users Are Switching Back to Salesforce Classic

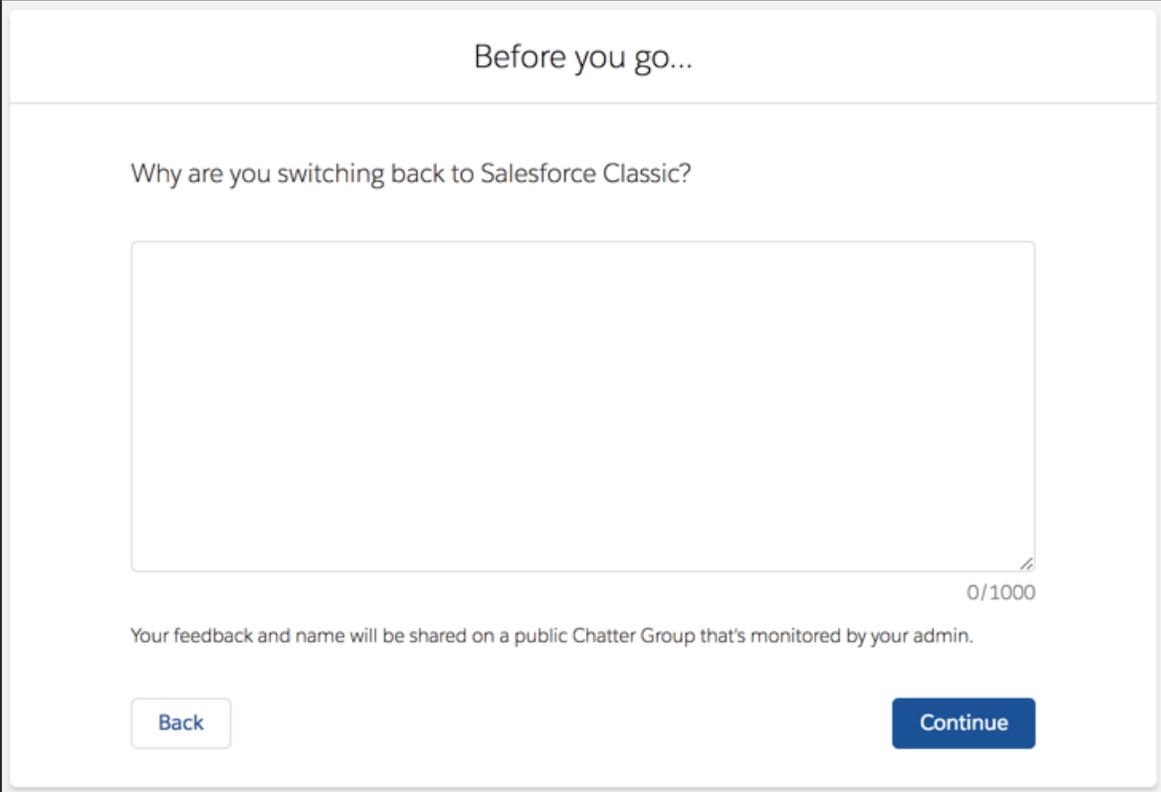
Discover why your users aren't adopting Lightning Experience by going to the source. A form prompts your users for feedback when they switch back to Salesforce Classic. Use the responses to educate users about productivity features and fine-tune your org customizations.

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 modal dialog box titled "Before you go...". Inside the dialog, the question "Why are you switching back to Salesforce Classic?" is displayed above a large text input field. A character count "0/1000" is visible at the bottom right of the input field. Below the input field, a disclaimer states: "Your feedback and name will be shared on a public Chatter Group that's monitored by your admin." At the bottom of the dialog, there are two buttons: "Back" on the left and "Continue" on the right.

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 User Feedback Form**.

SEE ALSO:

[Salesforce Help: Switch to Salesforce Classic Feedback Form \(can be outdated or unavailable during release preview\)](#)

Keep Users in Lightning Experience

Ready to adopt Lightning Experience for your org? Keep all users who have the Lightning Experience permission in the new interface by removing their ability to switch to Salesforce Classic.

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

How: From Setup in Lightning Experience, enter *Lightning* in the Quick Find box, and then select **Lightning Experience**. In the Lightning Experience Migration Assistant, on the Set Up Users tab, turn on **Keep Lightning Experience Users in Lightning Experience Only**. For new orgs created after this feature is released, this setting is turned on by default, and the Switcher is removed. For existing orgs, this feature is turned off by default.

If some of your users still need access to both interfaces, use the **Hide Option to Switch to Salesforce Classic** permission instead. If your org doesn't contain custom profiles, you can't use this setting. Use the Hide Option to Switch to Salesforce Classic permission instead.

SEE ALSO:

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

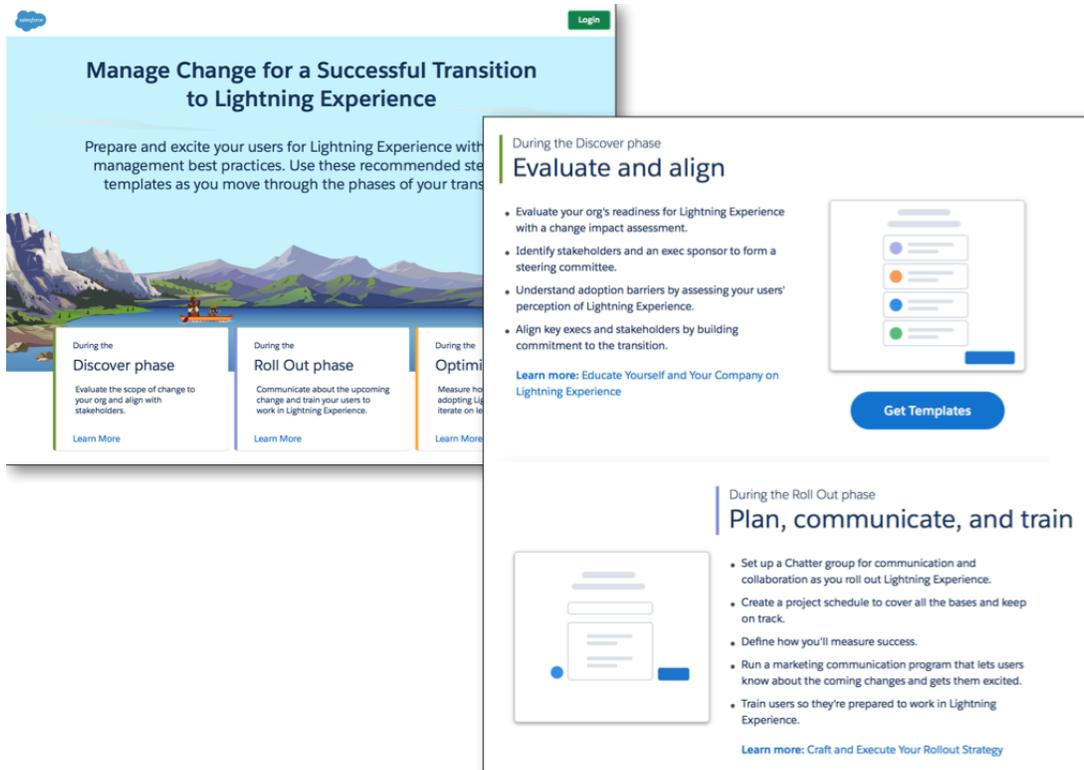
Guide Your Users' Transition to Lightning Experience with Change Management Resources

Addressing the human aspect of change is crucial to successful Lightning Experience adoption. The Lightning Experience Transition Change Management Hub guides you through best practices for managing change during each phase of your Lightning Experience transition. Take advantage of tools and templates to ensure the smoothest transition possible for your users.

Where: This tool is available for Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: The Change Management Hub is available on November 8, 2018.

How: To access the Change Management Hub, go to <https://lightning-readiness-check.salesforce.com/change>.



SEE ALSO:

[Salesforce Help: Manage Change During Your Lightning Experience Transition](#)

Move Actions and Buttons Easily When Transitioning to Lightning Experience (Beta)

Don't have time to move all your Salesforce Classic actions and buttons into Lightning Experience? The latest Lightning Experience Configuration Converter feature does just that in a simple, easy to understand wizard. Select the objects and page layouts to work on, and Salesforce does the heavy moving. The Lightning Experience Configuration Converter, which was made generally available during Summer '18, has been enhanced. Easily move custom, standard, and global actions from the Quick Actions in the Salesforce Classic Publisher section of a page layout to the Salesforce Mobile and Lightning Experience Actions section. Also included the right mobile actions and move custom and standard buttons along the way.

Important: As a beta feature, the Actions and Buttons feature in the Lightning Experience Configuration Converter 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 Actions and Buttons in the [Lightning Exp Configuration Converter Trailblazer Community](#).

Where: This tool is available for Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who: To use this tool, you must have the Customize Application and Modify All Data user permissions.

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.

SEE ALSO:

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

Enhancements to JavaScript Buttons in the Lightning Experience Configuration Converter

To make converting JavaScript buttons even smoother, Salesforce updated the Lightning Experience Configuration Converter. More objects are supported, the settings interface is easier, and detail page links are converted into links, not buttons.

Where: This tool is available for Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Who: To use the JavaScript Buttons feature of the Lightning Experience Configuration Converter, you must have the Customize Application and Modify All Data user permissions and have My Domain deployed in your org.

Why: The Account, Asset, Case, Contact, Event, Lead, Opportunity, Order, and Person Account objects, and all custom objects, are supported. Select the objects that you want to scan on the updated Settings interface.

Detail page links are now converted as links instead of buttons.

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.

SEE ALSO:

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

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 Winter '19 include direct links to the Lightning Experience Configuration Converter and the Visualforce Report. You also get new sections on the number of lookup fields on page layouts and My Domain. Plus, updated information about ROI.

Where: This feature 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**.

SEE ALSO:

[Salesforce Help: Check Your Lightning Experience Readiness \(can be outdated or unavailable during release preview\)](#)

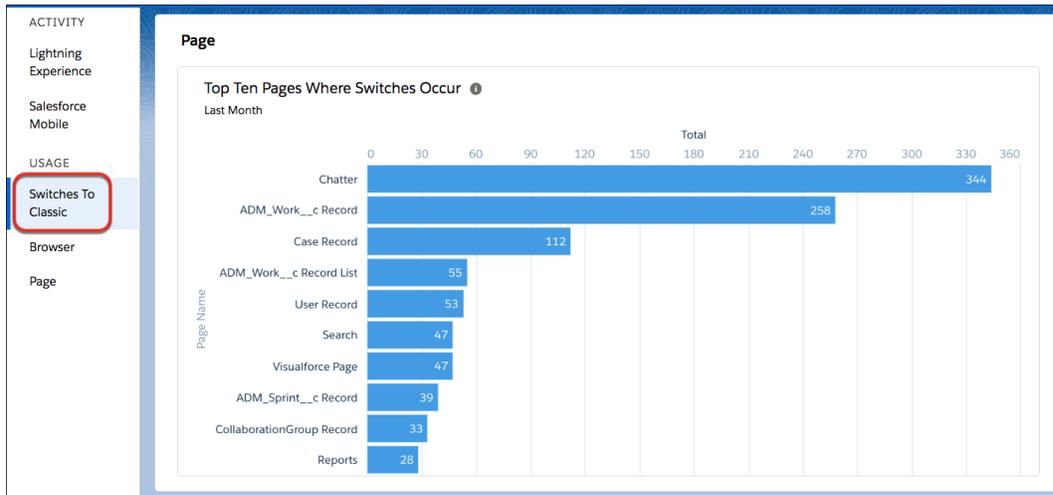
View Page Performance by Browser and Other New Metrics in the Lightning Usage App

You can now view more metrics in the Lightning Usage App, including page performance by browser. You can also generate reports using the Lightning Usage App objects.

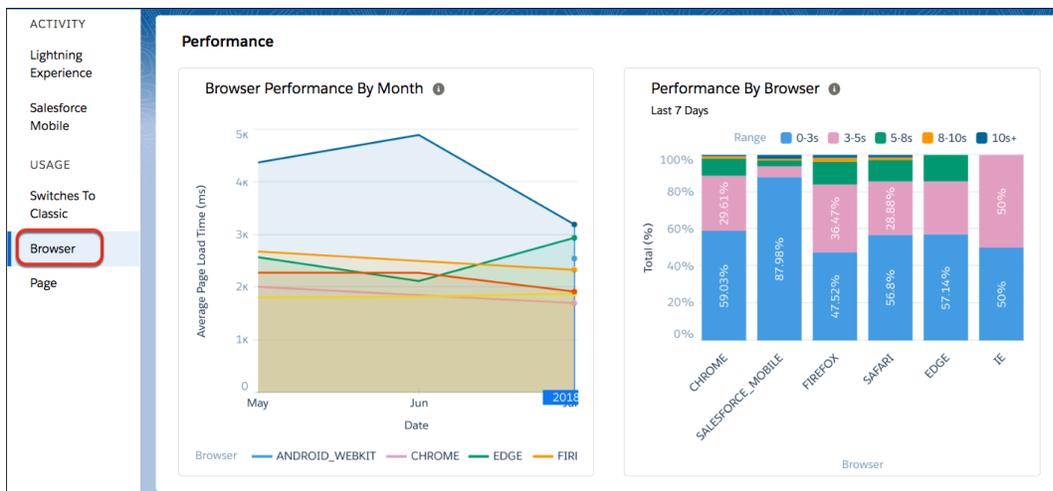
Where: This change applies to Lightning Experience in Group, Professional, Enterprise, Performance, and Unlimited editions. The Lightning Usage App is not available for sandbox orgs.

How: Select a tab to view the relevant data. Usage data must accrue over time to be displayed, so not all graphs are populated when you first launch the app.

- To view the 10 pages where switches occur most frequently, click **Switches to Classic** and scroll to the Page pane.

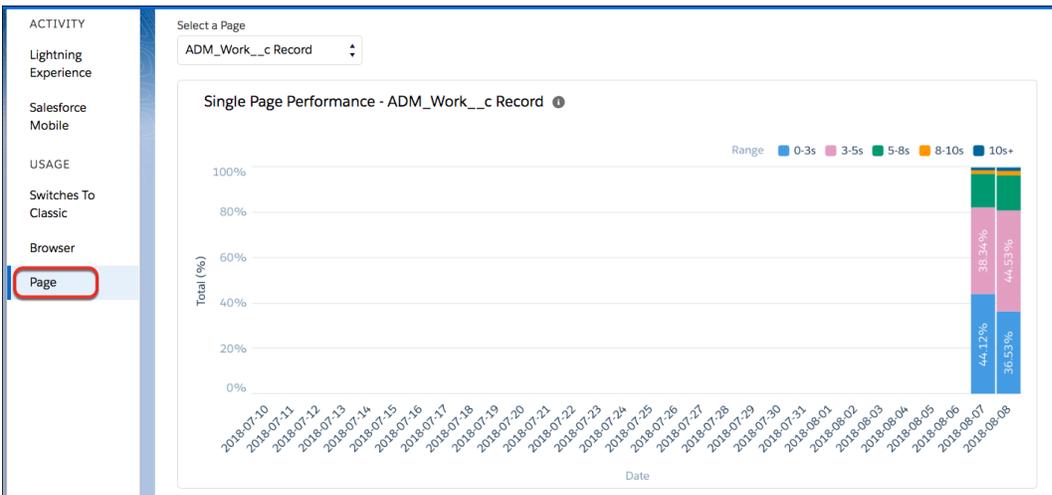
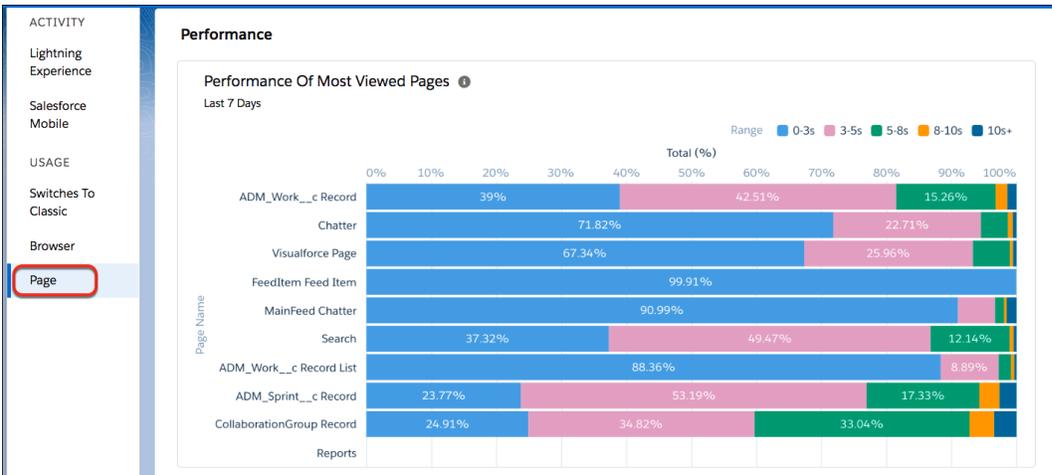


- To view page performance by browser, click **Browser**. The Performance pane displays page load times by browser for the previous 3 months and the previous 7 days.



Page load time, or Experienced Page Time (EPT), is a measure of how long it takes for a page to load so that a user can meaningfully interact with it. EPT is equivalent to "critical-path" or "time-to-interaction". Many parameters impact EPT, in particular network speed, hardware performance, page complexity, and number of components. Page complexity is the number of requests to the server or database and the amount of data downloaded. Complex pages usually have higher EPT values (longer load times).

- To view the performance of the top-viewed pages in Lightning Experience, click **Page**. The Performance pane shows the page load times for the most viewed pages, and the page load times of a selected page for the previous 30 days. The first time you launch the Lightning Usage App, the Single Page Performance pane displays data for the current day. Data for additional days displays as days accrue.



- To create custom reports, use the Lightning Usage App objects. See `LightningExitByPageMetrics`, `LightningToggleMetrics`, `LightningUsageByAppTypeMetrics`, `LightningUsageByBrowserMetrics`, `LightningUsageByFlexiPageMetrics`, and `LightningUsageByPageMetrics` in Standard Objects in the *SOAP API Developer Guide*.

SEE ALSO:

[Salesforce Help: Get Lightning Experience Adoption Insights from Custom Reports](#) (can be outdated or unavailable during release preview)

Change Your View with Display Density Settings

Two new Lightning Experience display density settings give you more control of how you want to view data without changing the page layout. Select one of the settings as the default, but users can choose their own display density at any time from the user profile menu.

Where: This feature applies to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Density changes don't apply to Communities or the Salesforce mobile app.

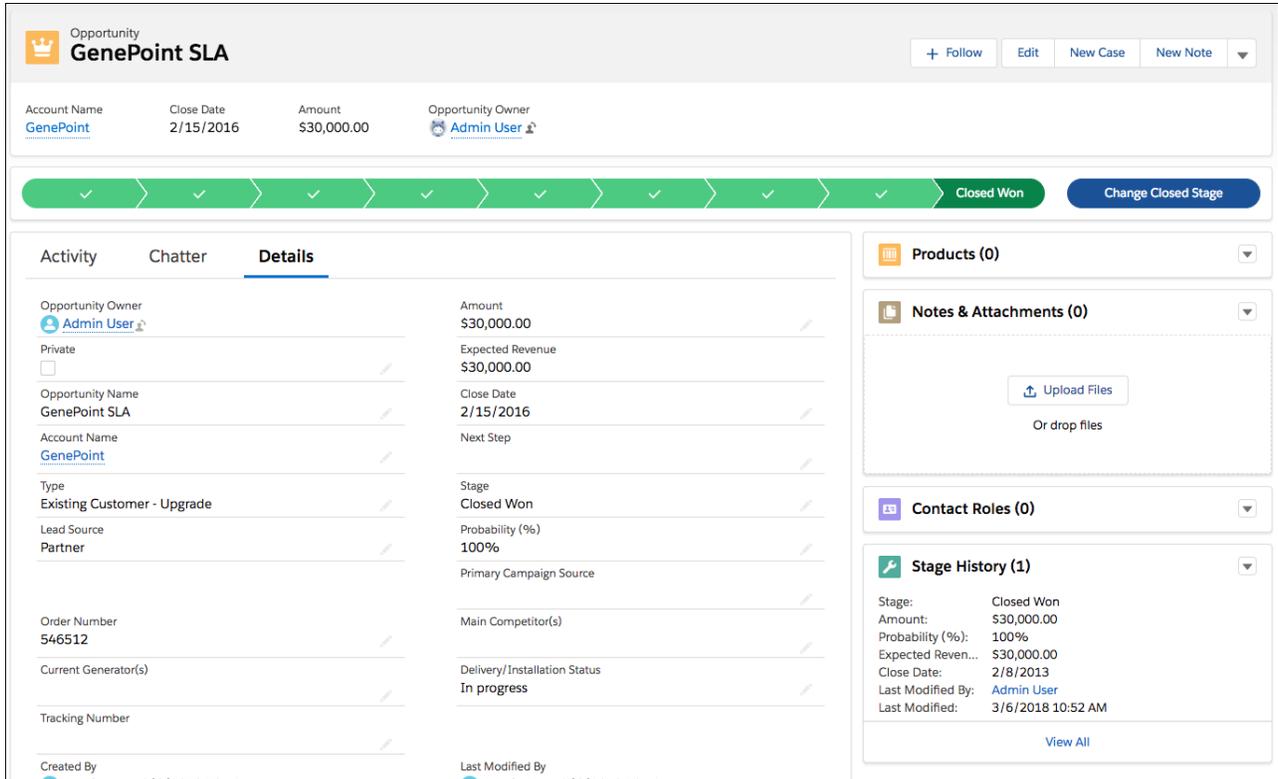
Why: The Compact setting, which has labels to the left of fields and less space between page elements, fits 30% more fields on the page.

The screenshot displays a Salesforce Opportunity record for 'GenePoint SLA' in Compact view. At the top, there are navigation buttons: '+ Follow', 'Edit', 'New Case', and 'New Note'. Below this, the record header shows 'Account Name: GenePoint', 'Close Date: 2/15/2016', 'Amount: \$30,000.00', and 'Opportunity Owner: Admin User'. A progress bar indicates the stage 'Closed Won' with a 'Change Closed Stage' button. The main content area is divided into 'Activity', 'Chatter', and 'Details' tabs. The 'Details' tab is active, showing a list of fields with labels on the left and values on the right. The right sidebar contains sections for 'Products (0)', 'Notes & Attachments (0)', 'Contact Roles (0)', and 'Stage History (1)'. The 'Stage History' section shows a table with columns for Stage, Amount, Probability (%), Expected Revenue, Close Date, Last Modified By, and Last Modified.

Field	Value
Opportunity Owner	Admin User
Private	<input type="checkbox"/>
Opportunity Name	GenePoint SLA
Account Name	GenePoint
Type	Existing Customer - Upgrade
Lead Source	Partner
Amount	\$30,000.00
Expected Revenue	\$30,000.00
Close Date	2/15/2016
Next Step	
Stage	Closed Won
Probability (%)	100%
Primary Campaign Source	
Main Competitor(s)	
Delivery/Installation Status	In progress
Order Number	546512
Current Generator(s)	
Tracking Number	
Created By	Admin User, 3/6/2018 10:52 AM
Last Modified By	Admin User, 3/6/2018 10:52 AM
Description	Delivery Status

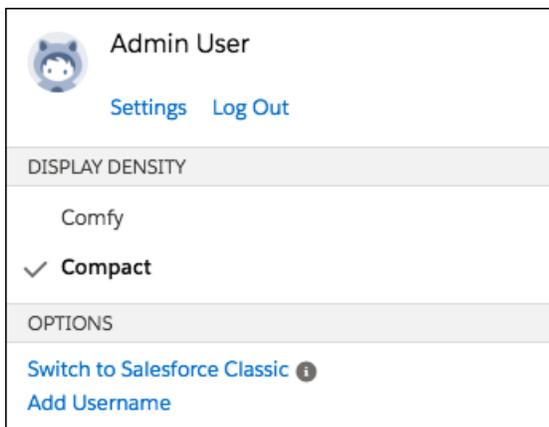
Stage	Amount	Probability (%)	Expected Revenue	Close Date	Last Modified By	Last Modified
Closed Won	\$30,000.00	100%	\$30,000.00	2/8/2013	Admin User	3/6/2018 10:52 AM

Comfy has labels on the top of fields and more space between page elements. It's similar to previous versions of Lightning Experience.

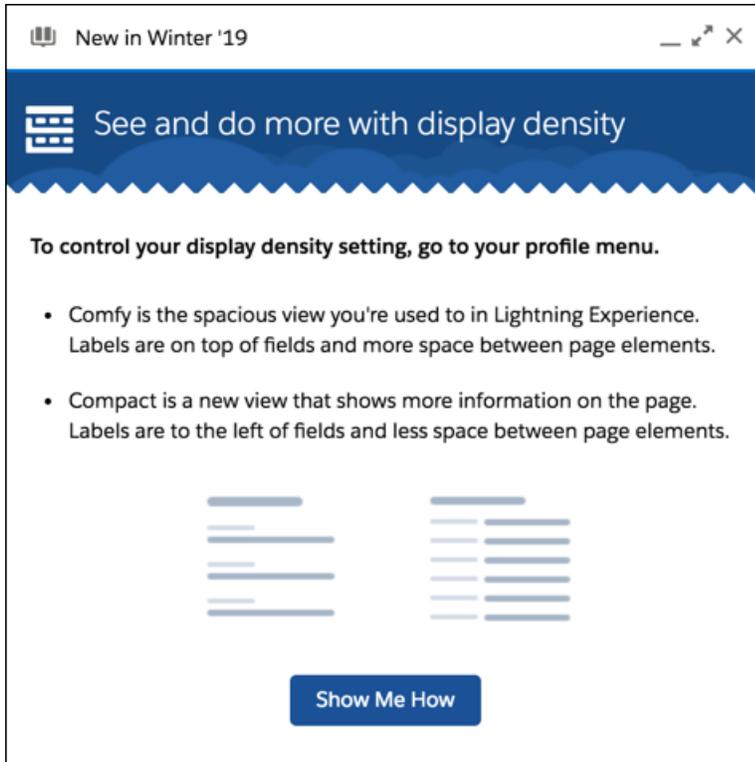


Both settings include some darkened text colors to go beyond the color contrast requirements of the W3C's WCAG 2.0 AA, the industry standard for web accessibility. Existing orgs have Comfy as the default setting. New orgs created after Winter '19 is released might default to Compact. Salesforce continues to improve the experience and expand to more page elements in future releases.

How: From Setup in Lightning Experience, enter *Density Settings* in the Quick Find box, and then select **Density Settings**. The org default setting applies, unless a user changes it from their profile menu. You can't override a user's display density preference.



Salesforce notifies all Lightning Experience users of the new setting with in-app assistance.



SEE ALSO:

[Change the Density of the User Interface](#)

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

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

[Salesforce Help: User Interface Settings \(can be outdated or unavailable during release preview\)](#)

Say Goodbye to Copy and Paste and Hello to Quick Text

Copying and pasting content is time consuming and tedious. Quick text is fast and easy—you can insert predefined messages into emails, tasks, events, chats, and more. To make quick text easier to use, we added more ways to insert quick text. Use a keyboard shortcut, a button in rich-text editor toolbars, like for email publishers, or a popup button next to supported text fields.

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

SEE ALSO:

[Share and Organize Macros and Quick Text in Folders](#)

[Click Away—Insert Quick Text into Your Emails with a Button](#)

[Use Quick Text in Tasks and Events](#)

[Use Quick Text in Your Knowledge Articles](#)

[Use a Button to Insert Quick Text into Your Chats](#)

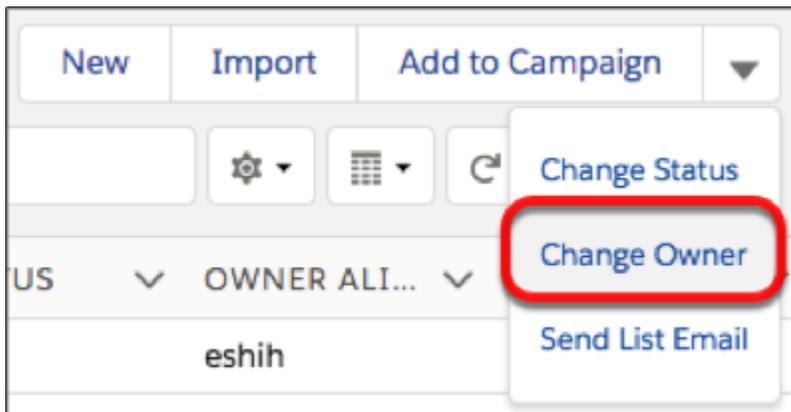
[Never Forget Quick Text Again Thanks to a Popup Button](#)

Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time

Use the Change Owner page-level button to assign a new owner for up to 200 selected leads, cases, or custom objects. You can access the button in the page-level action menu in a list view or related list in standard table mode, or in Related List Quick Links.

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

How: Select up to 200 records, then click **Change Owner** in the page-level action menu. Or, depending on your page layout, click  in the page-level action menu, and then click **Change Owner**.



In the Change Owner dialog box, enter the new owner name, select **Send Email Notification** if needed, and click **Submit**. You must have Edit permission for a selected record to change its owner.

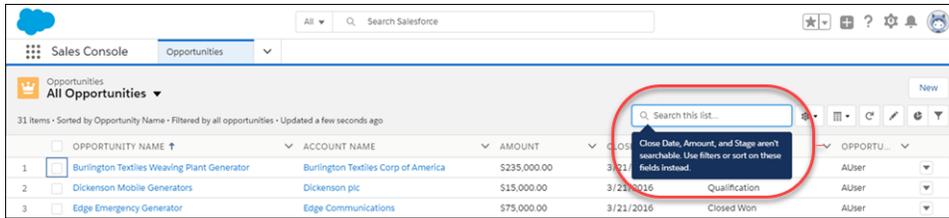
Find the Data You Need in a Jiffy with List View Search

Use the new search bar to search the field data in your list views and find the records you need in record time.

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

How: The list view search bar appears next to the **List View Controls** icon. Type in your query to get started. For a productivity boost, use the keyboard shortcut g+f to select the search bar. You can also add the search bar to the List View component in Lightning App Builder.

 **Note:** Certain fields aren't searchable, depending on the object. You can still filter or sort on those fields. A tooltip appears when you select the search bar, showing which fields aren't searchable. Be sure to check the tooltip if you aren't getting the search results that you're expecting. Generally, formula fields, lookup fields, and picklists aren't searchable. All searchable fields are queried, even if the corresponding columns aren't visible in the list view. Searching a "recently viewed" list doesn't show results in the recently viewed order.



SEE ALSO:

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

[Salesforce Help: I Know a Record Exists—Why Can't I Find It? \(can be outdated or unavailable during release preview\)](#)

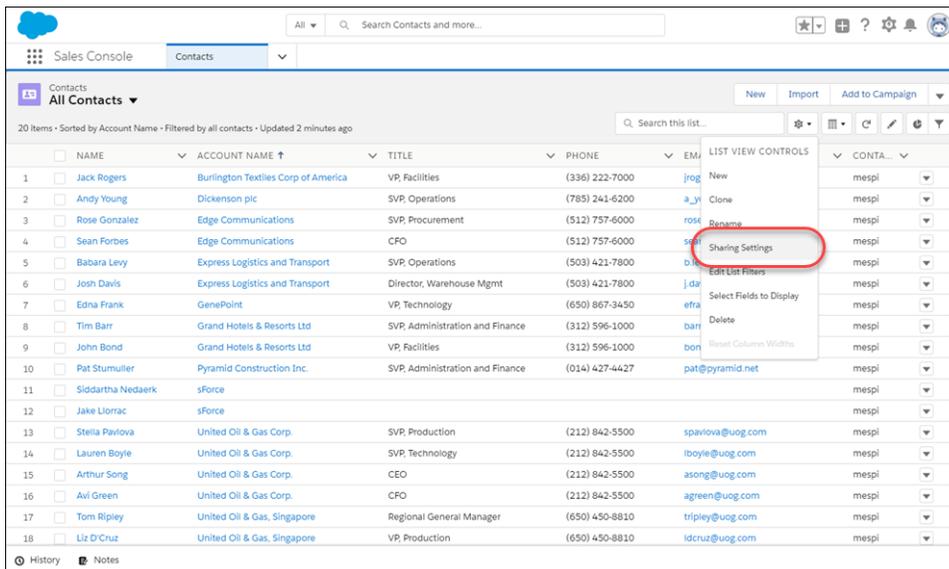
Collaborate with Ease with List View Sharing

Have a list view with an amazing set of filters that you'd love to share with your team? Or maybe you have a list view that you only want a select few to access. Take collaboration to the next level by sharing your list views with user groups in your org.

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

Who: To share public or custom list views, you need the Manage Public List Views permission.

How: Share your list views by selecting **Sharing Settings** from the **List View Controls** menu. From there, you can search through the roles in your org to find the groups you want to share your list view with.



Use Background Utility Items to Add Functionality to a Lightning App

Background utility items run without a visible entry in the utility bar. They provide an unobtrusive way to add functionality to your Lightning apps without cluttering the user experience.

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: In standard navigation and console navigation apps, you can create and add background utility items to invisibly execute code.

Here are a few nifty things you can do with background utility items.

- Add custom keyboard shortcuts
- Capture data on how your service agents or sales reps spend their time interacting with customers
- Enforce console tab limits
- Listen for events, like chat notifications, and notify the user

How: Implement the `lightning:backgroundUtilityItem` interface to use a custom component as a background utility item.

Improve Your Salesforce Implementation with Optimizer

Run the Salesforce Optimizer to determine how your company uses certain Salesforce features, and then identify ways that you can improve your implementation for your company. Salesforce added Disable Debug Mode and Details Tab to the Record Pages sections and updated the top success resources.

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

How: From Setup, enter *Optimizer* in the Quick Find box, then select **Optimizer**. Select **Run Report**. Continue running the Optimizer monthly to monitor progress and get all the benefits of the enhancements to the report.

Use Multi-Select Picklists Easily in Lightning Experience

When you edit records in Lightning Experience, multi-select picklists now behave like in Salesforce Classic.

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

Why: Previously, selecting values on a multi-select picklist in Lightning Experience was a chore because old values were deselected when you selected new ones. The new design retains old values in a second list.

How: Navigate to a record you want to update. On the record edit page, any field that uses the multi-select picklist type now displays a dueling picklist, also known as a dual listbox. Here are a few mouse and keyboard shortcuts to work with multi-select picklists.

- To select a single value, click the value or use the keyboard Up or Down Arrow key.
- To deselect the value, press Cmd+Click.
- To select multiple values, click a value and press Cmd+Click for subsequent values.
-  **Note:** Windows keyboards use Ctrl instead of Cmd.

To retain your selection, you must click the right arrow to move the selection to the second list and then save the record. Selecting a value from the second list and clicking the left arrow discards the value and prevents it from being saved.



Open Hyperlinks in Formula Fields Correctly

This critical update addresses an issue opening hyperlinks in formula fields. If you have formula fields that contain a `HYPERLINK` function, Lightning Experience currently ignores the target value when attempting to open the link. This critical update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This critical update is automatically enabled in Summer '19 on May 17, 2019.

Where: This change applies to Lightning Experience and the Salesforce app in all editions.

How: From Setup, enter *Critical Updates* in the Quick Find box. Then select **Critical Updates**. For Lightning Experience Honors Target Values for Hyperlinks in Formula Fields, click **Acknowledge**.

Lightning Console Apps: Customizable Tabs, Customizable Navigation Items, More APIs, and Visualforce Overrides

Make console your own with customizable tab titles, tab icons, and navigation items. You can also generate and open console URLs, and set your navigation item with the Lightning Console JavaScript API. Visualforce override support in console apps allow you to leverage your Visualforce overrides in Salesforce Classic.

 **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](#).

IN THIS SECTION:

[Clean Your Slate with the Close All Tabs Keyboard Shortcut](#)

Do you have more tabs open than anyone could ever hope to remember? Do you long for a quick and easy way to keep your workspace clean? Use the Shift+w keyboard shortcut to close all of your unpinned tabs at once.

[External Objects Now Supported in Lightning Console](#)

External objects are mapped to data that's stored outside of your org. An external object's tab title is based on its name field.

[Visualforce Overrides for Console Apps](#)

Take advantage of Visualforce code you already have for Salesforce Classic, and use them in your Lightning console apps. Visualforce overrides for new, edit, view, tab, list, and clone are now supported in console apps.

[Navigation Items No Longer Open in Workspace Tabs by Default](#)

Navigation items no longer open in workspace tabs unless you open them using Ctrl+click or Cmd+click. You can access navigation items by clicking on the navigation bar itself. This change gives all navigation items a consistent behavior when opened. Previously, some navigation items would open in workspace tabs, while others would open without one.

[Generate Console URLs and Set Navigation Items with Lightning Console JavaScript APIs](#)

These new methods in the Lightning Console JavaScript API, bridge some gaps with the Salesforce Console Integration Toolkit JavaScript API: `generateConsoleUrl()`, `openConsoleUrl()`, `setSelectedNavigationItem()`.

[Streamline Your Workflow by Personalizing Your Navigation Items](#)

Quickly get to your top destinations by adding and rearranging items in your navigation bar.

[Create an Intuitive Workspace with Customizable Workspace Tab Titles and Icons](#)

Make your workspace truly your own by customizing your workspace tab titles and icons. Have a workspace tab that you constantly return to? Give it a unique title and icon to find it at a glance. You can also customize the icons for your pinned tabs.

SEE ALSO:

[Salesforce Console API](#)

[Use Background Utility Items to Add Functionality to a Lightning App](#)

[Switch to Lightning Experience Directly from Your Salesforce Classic Console App](#)

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

Clean Your Slate with the Close All Tabs Keyboard Shortcut

Do you have more tabs open than anyone could ever hope to remember? Do you long for a quick and easy way to keep your workspace clean? Use the Shift+W keyboard shortcut to close all of your unpinned tabs at once.

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.

External Objects Now Supported in Lightning Console

External objects are mapped to data that's stored outside of your org. An external object's tab title is based on its name field.

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.

Visualforce Overrides for Console Apps

Take advantage of Visualforce code you already have for Salesforce Classic, and use them in your Lightning console apps. Visualforce overrides for new, edit, view, tab, list, and clone are now supported in console apps.

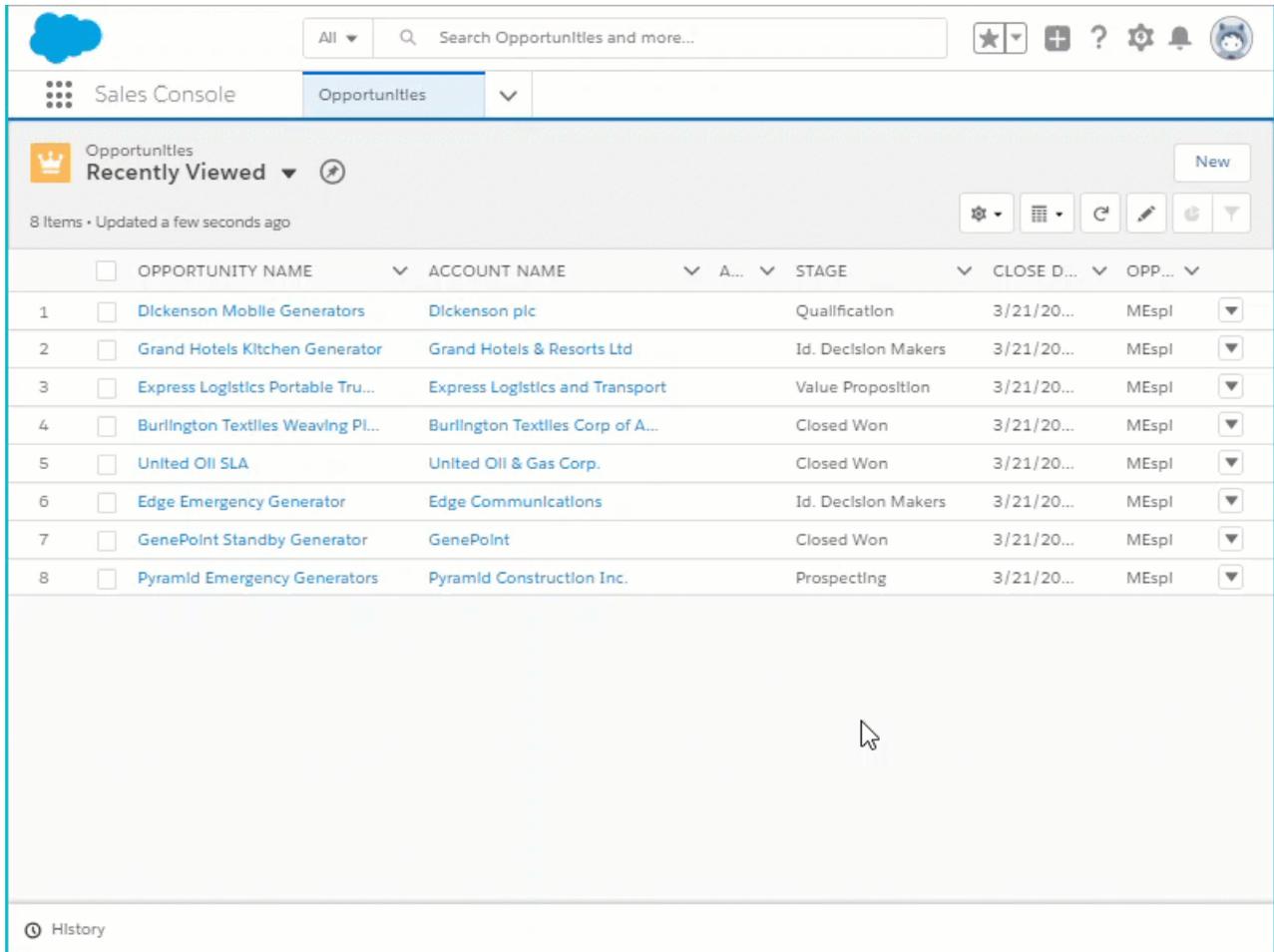
Where: This change applies to Lightning Experience for Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing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

Navigation Items No Longer Open in Workspace Tabs by Default

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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: The first animation shows the old navigation behavior, and the second one shows the new behavior. Notice how the Home page no longer opens in a workspace tab.



The screenshot shows the Salesforce Lightning Console interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and several utility icons. Below the navigation bar, the 'Sales Console' is active, and the 'Opportunities' tab is selected. The main content area displays a list of 8 recently viewed opportunities. The table has columns for Opportunity Name, Account Name, Stage, Close Date, and Opportunity Type. A mouse cursor is visible over the table area.

	OPPORTUNITY NAME	ACCOUNT NAME	A...	STAGE	CLOSE D...	OPP...
1	Dickenson Mobile Generators	Dickenson plc		Qualification	3/21/20...	MEspl
2	Grand Hotels Kitchen Generator	Grand Hotels & Resorts Ltd		Id. Decision Makers	3/21/20...	MEspl
3	Express Logistics Portable Tru...	Express Logistics and Transport		Value Proposition	3/21/20...	MEspl
4	Burlington Textiles Weaving Pl...	Burlington Textiles Corp of A...		Closed Won	3/21/20...	MEspl
5	United Oil SLA	United Oil & Gas Corp.		Closed Won	3/21/20...	MEspl
6	Edge Emergency Generator	Edge Communications		Id. Decision Makers	3/21/20...	MEspl
7	GenePoint Standby Generator	GenePoint		Closed Won	3/21/20...	MEspl
8	Pyramid Emergency Generators	Pyramid Construction Inc.		Prospecting	3/21/20...	MEspl

History

The screenshot displays the Salesforce Lightning Console interface for the 'Opportunities' app. The top navigation bar shows 'Sales Console' and 'Opportunities'. Below this, the 'Recently Viewed' section is active, showing a list of 8 items. The table columns are: OPPORTUNITY NAME, ACCOUNT NAME, A..., STAGE, CLOSE D..., and OPP... The data rows include:

	OPPORTUNITY NAME	ACCOUNT NAME	A...	STAGE	CLOSE D...	OPP...
1	Pyramid Emergency Generat...	Pyramid Construction Inc.		Prospecting	4/11/20...	mespl
2	GenePoint Standby Generator	GenePoint		Closed Won	4/11/20...	mespl
3	Edge Emergency Generator	Edge Communications		Closed Won	4/11/20...	mespl
4	Burlington Textiles Weaving ...	Burlington Textiles Corp of A...		Closed Won	4/11/20...	mespl
5	Dickenson Mobile Generators	Dickenson plc		Quallification	4/11/20...	mespl
6	Grand Hotels Guest Portable ...	Grand Hotels & Resorts Ltd		Value Proposition	4/11/20...	mespl
7	United Oil Refinery Generators	United Oil & Gas Corp.		Proposal/Price Qu...	4/11/20...	mespl
8	United Oil Standby Generators	United Oil & Gas Corp.		Closed Won	4/11/20...	mespl

Generate Console URLs and Set Navigation Items with Lightning Console JavaScript APIs

These new methods in the Lightning Console JavaScript API, bridge some gaps with the Salesforce Console Integration Toolkit JavaScript API: `generateConsoleUrl()`, `openConsoleUrl()`, `setSelectedNavigationItem()`.

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.

SEE ALSO:

[Salesforce Console API](#)

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

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

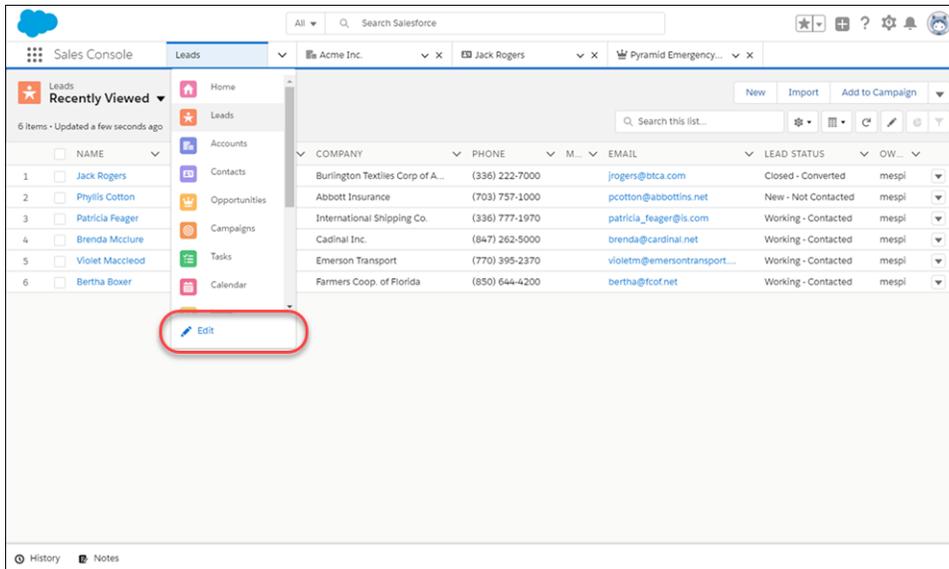
[Salesforce Console Developer Guide: setSelectedNavigationItem \(can be outdated or unavailable during release preview\)](#)

Streamline Your Workflow by Personalizing Your Navigation Items

Quickly get to your top destinations by adding and rearranging items in your navigation 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: Click **Edit** on the navigation bar to get started. Rearrange the order of your navigation items by dragging, or click **Add More Items** if anything is missing.

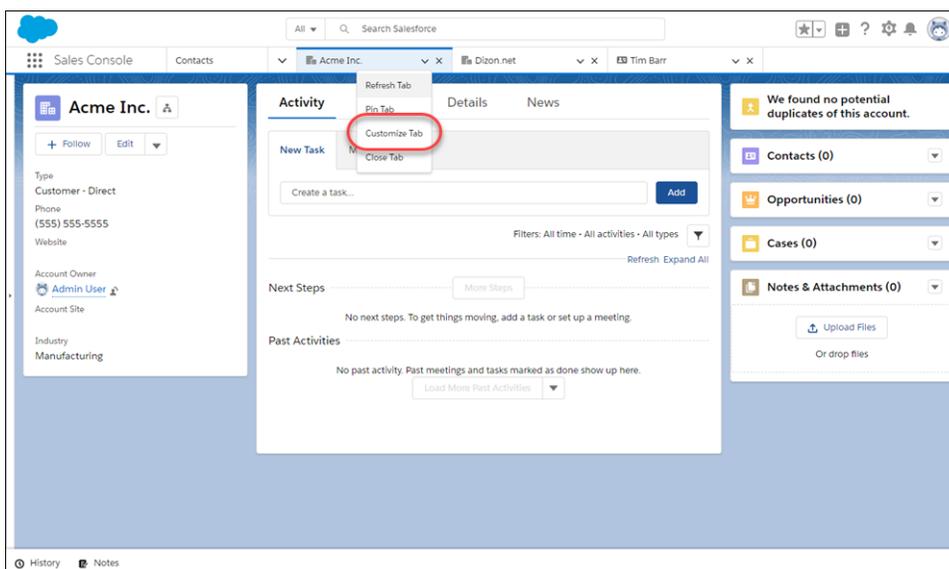


Create an Intuitive Workspace with Customizable Workspace Tab Titles and Icons

Make your workspace truly your own by customizing your workspace tab titles and icons. Have a workspace tab that you constantly return to? Give it a unique title and icon to find it at a glance. You can also customize the icons for your pinned tabs.

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: Open your workspace tab's dropdown menu, and click **Customize Tab**. From there, you can rename the tab and change its icon.



Salesforce Surveys: More Control to Gather the Data You Need

Salesforce Surveys gives you new question types, more options to view related information, and an improved experience for participants.

IN THIS SECTION:

[Gather Specialized Data with New Question Types](#)

Take advantage of three new question types to gather data from your participants: CSAT, sliders, and picklists. CSAT questions let participants select a customer satisfaction score from a list of options. Slider questions let participants select a value on a sliding scale. With picklist questions, participants select a value from a predefined list of options.

[Add Multiple Questions to a Survey Page](#)

Add multiple questions to a single page to help participants move through surveys more quickly.

[Invite Person Accounts to Participate in Surveys](#)

Improve your response rate by sending personalized survey invitations to people who are associated with person account records.

[View a Person Account's Survey Invitations](#)

You can now see which surveys a person account has been invited to take. Previously, you could only check contact records.

[View Status and Responses on Survey Invitations](#)

You can now view useful information related to your survey invitations on the Survey Invitation record. See if a participant has opened, started, or completed the survey. After a participant completes the survey, take a look at the responses directly from the Survey Invitations related list. With these improvements, get survey data in context without building complex reports or accessing the API.

[Generate Survey Invitations Automatically](#)

Automate the process of creating a survey invitation when a record is added or changed. Use Process Builder to create a process that generates an invitation based on the criteria you set.

[Choose Whether Participants Must Log In to Take a Survey](#)

When sending a survey to a contact or a person account, you can choose whether the participant must log in before taking the survey.

[Question Properties Menu Has a New Home](#)

We moved the question properties menu from the lower-right corner of a survey page to the upper-right corner of each survey question.

[Editing Active Surveys Is No Longer Supported](#)

Back in the old days, survey creators could make changes to a survey even after it was sent to participants. These changes often resulted in inconsistent data and usability problems for participants. To save your participants and data scientists some frustration, editing an active survey is no longer supported.

[Gather Data from Banking Customers with Salesforce Surveys in Financial Services Cloud](#)

Salesforce Surveys is now available in Financial Services Cloud! Users can create beautiful surveys to gather insights from banking and financial services customers. Financial Services Cloud customers automatically receive five Survey Creator licenses that you can assign to users.

[Pause... and Resume a Survey](#)

Participants can now pause a survey and come back to finish it later without losing their progress.

Gather Specialized Data with New Question Types

Take advantage of three new question types to gather data from your participants: CSAT, sliders, and picklists. CSAT questions let participants select a customer satisfaction score from a list of options. Slider questions let participants select a value on a sliding scale. With picklist questions, participants select a value from a predefined list of options.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: In the Survey Builder, add a page, and then click **Add Question**. Select one of these question types from the list.

Add Multiple Questions to a Survey Page

Add multiple questions to a single page to help participants move through surveys more quickly.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Who: Only users who are assigned a Survey Creator license can create surveys.

How: In the Survey Builder, add a page. Click **Add Question** to add as many questions as you want to that page.

Invite Person Accounts to Participate in Surveys

Improve your response rate by sending personalized survey invitations to people who are associated with person account records.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions that have Salesforce Surveys enabled.

View a Person Account's Survey Invitations

You can now see which surveys a person account has been invited to take. Previously, you could only check contact records.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions that have Salesforce Surveys enabled.

How: Add the Survey Invitation related list to the Person Account object's page layout.

To see if a person account has already been invited to a survey, check the Related tab of the person account record.

View Status and Responses on Survey Invitations

You can now view useful information related to your survey invitations on the Survey Invitation record. See if a participant has opened, started, or completed the survey. After a participant completes the survey, take a look at the responses directly from the Survey Invitations related list. With these improvements, get survey data in context without building complex reports or accessing the API.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: On the survey record page, click **Related** to see the survey's invitations.

Survey
community survey

New Contact New Opportunity New Case

Details **Related**

Survey Versions (1)

NAME	VERSION NUMBER
Community Survey	1

[View All](#)

Survey Invitations (3)

NAME	IS DEFAULT
Generic invitation for community	<input checked="" type="checkbox"/>
Generic Invitation_11_29_2017 20:24:52	<input checked="" type="checkbox"/>
Generic Invitation_11_29_2017 20:24:56_0...	<input type="checkbox"/>

[View All](#)

- To see the status of the survey, click the name of the survey invitation. The response status is listed on the Details page.
- To see a participant's responses to a survey, next to the invitation, click > **View Responses**.

Generate Survey Invitations Automatically

Automate the process of creating a survey invitation when a record is added or changed. Use Process Builder to create a process that generates an invitation based on the criteria you set.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

[Salesforce Help: Generate Survey Invitations Using the Process Builder](#)

Choose Whether Participants Must Log In to Take a Survey

When sending a survey to a contact or a person account, you can choose whether the participant must log in before taking the survey.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

[Give Guest Users Permission to Create Surveys and Ideas](#)

Question Properties Menu Has a New Home

We moved the question properties menu from the lower-right corner of a survey page to the upper-right corner of each survey question.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: When you add a question to a survey page, click  next to a question to change its properties.

Editing Active Surveys Is No Longer Supported

Back in the old days, survey creators could make changes to a survey even after it was sent to participants. These changes often resulted in inconsistent data and usability problems for participants. To save your participants and data scientists some frustration, editing an active survey is no longer supported.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

Gather Data from Banking Customers with Salesforce Surveys in Financial Services Cloud

Salesforce Surveys is now available in Financial Services Cloud! Users can create beautiful surveys to gather insights from banking and financial services customers. Financial Services Cloud customers automatically receive five Survey Creator licenses that you can assign to users.

Where: This change applies to all customers who are using Financial Services Cloud in Salesforce.

Who: Only users who are assigned a Survey Creator license can create surveys.

How: To set up Salesforce Surveys in Financial Services Cloud, see the [Salesforce Help](#). For more information on how Salesforce Surveys can help support your customers, see the Financial Services Cloud Release Notes.

Pause... and Resume a Survey

Participants can now pause a survey and come back to finish it later without losing their progress.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

How: When you create a survey, make sure that participants are required to authenticate before they can take the survey. Pausing surveys is supported only for surveys that require authentication.

Search: Relevant Results in Real Time and More Ways to Filter Results and Search

Objects you interact with get an instant boost in search results. Filter search results in more ways and in more places. A new object is searchable.

IN THIS SECTION:

[Get More Relevant Search Results Without the Wait](#)

Search results now instantly prioritize the objects you interact with. That means new users, or users changing roles, don't have to build up interaction history to see what's most important when they search. Previously, it took some time to accrue interactions with objects and prioritize those objects in search results. Now any object your users open, create, or update gets an instant boost when using global search.

[Search and Filter Results in More Places](#)

Getting too many results when you search? Cut through the clutter with filters and a more customizable search results page. You can search in lists, too.

[Filter Search Results for Custom Objects](#)

When you get too many results for custom objects, use filters to fine-tune the list and find exactly what you need.

[Filter Search Results by Number Range](#)

When the numbers matter, use filters to frame your search results. Zero in on opportunities that fall within a certain amount or probability range. Looking for that big presentation? You can also filter files by size.

[Find Messaging Sessions Using Global Search](#)

Messaging Session is now a searchable object in Lightning Experience. Support agents who use LiveMessage can use global search to find a messaging session by name.

Get More Relevant Search Results Without the Wait

Search results now instantly prioritize the objects you interact with. That means new users, or users changing roles, don't have to build up interaction history to see what's most important when they search. Previously, it took some time to accrue interactions with objects and prioritize those objects in search results. Now any object your users open, create, or update gets an instant boost when using global search.

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

Search and Filter Results in More Places

Getting too many results when you search? Cut through the clutter with filters and a more customizable search results page. You can search in lists, too.

Where: Search enhancements are available in various features and various editions. See the topics linked below for details.

How: Check out the new searching and filtering options in Knowledge, Communities, Tasks, lists, and other objects.

[Filter Search Results for Custom Objects](#)

When you get too many results for custom objects, use filters to fine-tune the list and find exactly what you need.

[Customize Global Search to Find the Most Relevant Knowledge Data](#)

Configure global search to include Lightning Knowledge fields in search results and filter options. Because this update applies to Lightning Experience, Salesforce Knowledge fields in the Knowledge sidebar, Knowledge tab, Articles tab, or Article Management

are unavailable for search results and filter customization. If you configure search filters, Lightning Advanced Search filters for Knowledge in global search don't change.

Filter Search Results in Communities

Give your community and portal users the opportunity to refine their searches. Users in a community can now filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks.

Find the Data You Need in a Jiffy with List View Search

Use the new search bar to search the field data in your list views and find the records you need in record time.

Filter Search Results by Number Range

When the numbers matter, use filters to frame your search results. Zero in on opportunities that fall within a certain amount or probability range. Looking for that big presentation? You can also filter files by size.

Filter by Task Subject in Global Search Results

Reps can whittle down search results to find tasks with a certain subject. If you use predefined subjects, you can filter for those subjects to make grouping tasks easy. For example, to make a call list after a trade show, reps search for "trade show" in tasks, and then filter for the predefined subject "Call" in the predefined subject. And no extra setup is involved because the filters are based on the required Subject field in the Activity Search Results layout. The subject always appears on the search results page and is always filterable.

SEE ALSO:

[Salesforce Help: Filter and Sort Search Results in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

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

Filter Search Results for Custom Objects

When you get too many results for custom objects, use filters to fine-tune the list and find exactly what you need.

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

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. You can't filter encrypted fields.

SEE ALSO:

[Salesforce Help: Filter and Sort Search Results in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

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

Filter Search Results by Number Range

When the numbers matter, use filters to frame your search results. Zero in on opportunities that fall within a certain amount or probability range. Looking for that big presentation? You can also filter files by size.

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

Why: For example, use number range filters to create a list of hot opportunities to follow up on. On the search results page, click **Opportunities** in the sidebar to see the available filters. Enter your target range, and click the magnifying glass.

The screenshot displays the Salesforce search results for the 'grand' query. The search bar at the top shows 'grand' and the results are filtered by Amount and Probability, sorted by Relevance. The results table lists five opportunities, all associated with 'Grand Hotels & Resorts Ltd'.

OPPORTUNITY NAME	ACCOUNT NAME	AMOUNT	PROBABILITY (%)
Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	\$107,000.00	60%
Grand Hotels Kitchen Generator	Grand Hotels & Resorts Ltd	\$165,000.00	60%
Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	\$125,000.00	70%
Grand Hotels SLA	Grand Hotels & Resorts Ltd	\$210,000.00	90%
Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	\$175,000.00	80%

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. You can't filter encrypted fields.

SEE ALSO:

[Salesforce Help: Filter and Sort Search Results in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

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

Find Messaging Sessions Using Global Search

Messaging Session is now a searchable object in Lightning Experience. Support agents who use LiveMessage can use global search to find a messaging session by name.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

SEE ALSO:

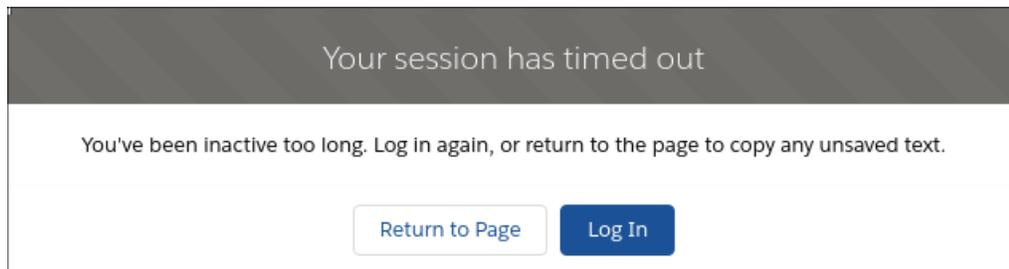
[Salesforce Help: Searchable Fields by Object in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Recover Your Unsaved Text After Getting Timed Out

Sometimes your Lightning Experience session is interrupted, whether you've been inactive too long or you lost your connection. You used to see the same timeout message, regardless of how your session ended. Now the message that pops up is specific to your scenario and tells you how to recover unsaved text.

Where: This change applies to Lightning Experience and the Salesforce app in all editions.

Why: If your session is interrupted, return to the page to copy unsaved text, like a Chatter post, so you don't lose it while logging in.



Retention Limit for Field History Data Is Now Enforced

Salesforce guarantees to retain your field history data for up to 18 months through your org, and up to 24 months via the API. To ensure high availability of data and accommodate the fast-growing data needs of our customers, up until now, we haven't enforced the 18-month retention policy. Starting with Winter '19, you can access data older than 18 months only in a limited fashion via Data Loader or the API. In Spring '19, you can access field history data up to 24 months old via Data Loader or the API, but we begin the process of removing field history data older than 24 months.

Where: This policy applies to all orgs created after June 1, 2011 who have not purchased the FAT add-on.



Note: If your org was created before June 1, 2011, Salesforce commits to retain your field history beyond the 18-month limit.

How: To guarantee that you can access your field history data, purchase the FAT add-on. FAT lets you define a policy to retain archived field history data up to 10 years from the time the data was archived. After Winter '19, you have a few months grace period to either purchase FAT or create your own back-up plan. The grace period ends with Spring '19. Because of the rolling nature of mass deletes, the data may still be available for some time after Spring '19. However, you should use this date as a deadline in your planning. To purchase FAT, contact Salesforce Customer Support.

- During the grace period, use Data Loader or the `queryAll()` API to retrieve old field history.
- Once field history data reaches the 18-month limit, Salesforce retains it for 6 more months, but the data is accessible only via Data Loader or the API. This 6-month extended period is ongoing behavior, even after Spring '19. Once Salesforce deletes data, you can't use the `getDeleted()` API to retrieve it.

- If you need help retrieving your field history before it's deleted, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: Field History Tracking](#)

[Salesforce Help: Field Audit Trail](#)

[Salesforce Help: Export Data with Data Loader](#)

[Developer Guide: queryAll\(\) API](#)

Support for IE9 and IE10 Is Ending

We will no longer support Internet Explorer (IE) 9 and 10 starting on April 5, 2019. We recommend that you move to a supported browser, such as Chrome, Firefox, Safari, Edge, or IE 11. After April 5, 2019, you can continue to access Salesforce Classic and Salesforce Tabs + Visualforce Communities using IE9 and IE10. However, Salesforce won't provide support for issues that you encounter using these browsers.

Where: This change applies to Salesforce Classic and Salesforce Tabs + Visualforce Communities in all editions.

Why: These browser versions are outdated and, as of January 12, 2016, are no longer receiving critical security updates from Microsoft. With this change, we want to ensure that you and your users can access your data through supported and more secure browsers.

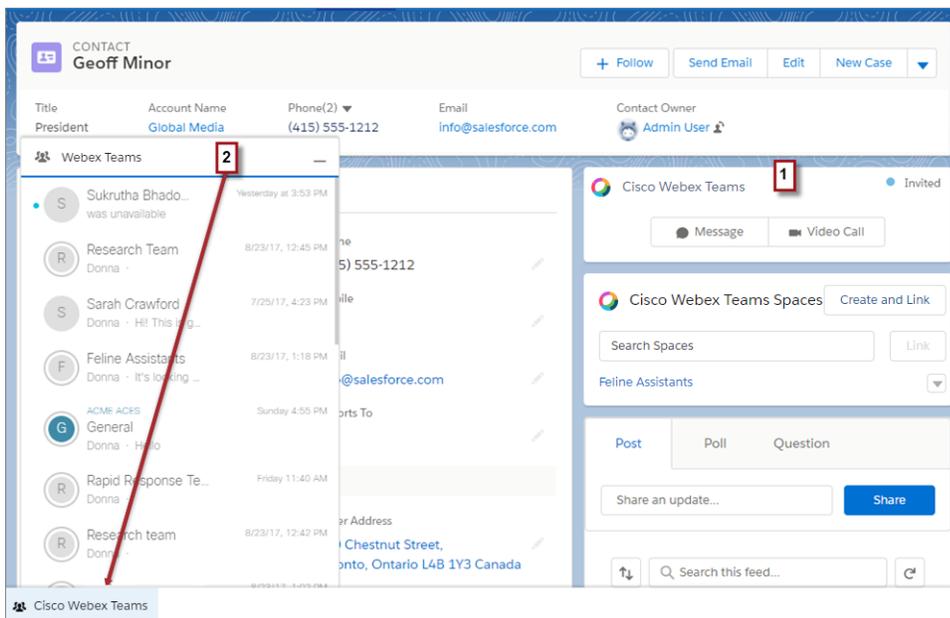
Cisco Spark Is Now Cisco Webex Teams

Cisco Webex Teams™ for Salesforce reflects the new Cisco Webex (formerly Cisco Spark) branding. Look for the new names and icons in the app and the help.

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

Who: This feature is available to Salesforce admins and Salesforce users with the Cisco Webex Teams Conversation or Cisco Webex Meetings permissions (formerly Cisco Spark Conversation and WebEx Meetings permissions).

Why: Cisco Spark changed to Cisco Webex Teams (1) and (2), and Cisco WebEx changed to Cisco Webex Meetings.



SEE ALSO:

[Salesforce Help: Cisco Webex for Salesforce \(can be outdated or unavailable during release preview\)](#)

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.

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 Winter '19 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.

EDITIONS

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

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](#)

Salesforce Overall

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

[Change Your View with Display Density Settings](#)

[Say Goodbye to Copy and Paste and Hello to Quick Text](#)

[Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time](#)

[Find the Data You Need in a Jiffy with List View Search](#)

[Collaborate with Ease with List View Sharing](#)

[Use Background Utility Items to Add Functionality to a Lightning App](#)

[Improve Your Salesforce Implementation with Optimizer](#)

[Use Multi-Select Picklists Easily in Lightning Experience](#)

[Open Hyperlinks in Formula Fields Correctly](#)

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[Keep Users in Lightning Experience](#)

[Guide Your Users' Transition to Lightning Experience with Change Management Resources](#)

[Move Actions and Buttons Easily When Transitioning to Lightning Experience \(Beta\)](#)

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Search

[Get More Relevant Search Results Without the Wait](#)
[Search and Filter Results in More Places](#)
[Filter Search Results for Custom Objects](#)
[Filter Search Results by Number Range](#)
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Lightning Essentials

[Celebrate Learning with In-App Trailhead Badges](#)
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Sales Cloud Einstein

[Einstein Forecasting: Optimize Your Forecasting Model with Custom Fields](#)
[Einstein Activity Capture: Get More from Einstein Email Insights and Connect with Recommended Connections](#)
[Einstein Readiness Assessor: Run the Readiness Assessor in Sandbox](#)
[Einstein Lead Scoring: Update the Einstein Lead Scoring Dashboard](#)

Core Sales Features

[Collaborative Forecasts: Territory Forecasting \(Generally Available\), Forecast Sharing \(Generally Available\), and an Enhanced Forecasts Page](#)
[Enterprise Territory Management: Forecast Sales by Territory \(Generally Available\)](#)
[Accounts: Multiple Team Members and Partner Users on Account Teams](#)
[Campaigns: Sync Pardot and Salesforce Campaign Members and Quickly Adjust Filters on Campaign Related Lists](#)
[Leads: Reject Leads That Don't Use reCAPTCHA](#)
[Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams](#)
[Other Changes in Core Sales Features](#)

Productivity Features

[Inbox: Get More Relevant Suggestions with Custom Einstein Email Insights](#)
[Email Experience: Attachments in List Emails and Actions, Bounce Notifications, Email Tracking, and Quick Text](#)
[Email Templates: Privacy and Merge Field Improvements, Attachments on Templates, Better Experience Using Classic Templates](#)
[Lightning Dialer: Recording and Call Bridge](#)

Einstein Activity Capture: Einstein Email Insights Improvements and Recommended Connections

Activities: Task Reminders in Quick Actions, Quick Text, and Improved Filters on the Activity Timeline

Kanban: Recently Viewed Availability, Search Kanban View

Calendar: Event Series and More Task Filters

Sales Console: Customized Navigation Items and Improvements to Macros and Quick Text

Lightning Data: Match Selection, More Usable Labels

Select a Match When the Automatic Match Isn't the Right One

Status Label Not Found Was Changed

Match Confidence Score Label Was Changed

Address Field Labels Were Changed

Integration with Google

Lightning for Gmail: Increase Productivity with Inbox Beta for Gmail (Beta)

Lightning Sync for Google: Syncing for API-Triggered Updates and Flexible Sync Options

Integration with Microsoft®

Outlook Integration: Combined Add-In in the Office Store, Inbox Features General Availability, and Text Shortcuts

Lightning Sync for Microsoft® Exchange: Event Series and Syncing for API-Triggered Updates

Salesforce for Outlook: Product Availability and Versions

Salesforce CPQ and Billing

Salesforce CPQ: More Subscription Type and Pricing Options, Improved Pricing Method for Percent of Total Products, and Reduced Data Entry in Lightning

Salesforce Billing: Enhancements to Payment Gateway and Revenue Adjustments, Simplified Management for Multiple Billing Transactions, and Easier Cancellations for Order Products

Pardot

Align Sales and Marketing on a Single Platform with Pardot in Lightning Experience (Generally Available)

Easily Opt In Opted-Out Prospects Synced to Salesforce

Send Engage Campaigns from More Places

UI Improvements in the Pardot Lightning App

View Sent Automated Emails

Service

Setup Flows: Bring Your Service to the Next Level

Einstein Bots

Supercharge Your Bot with Autolaunched Flows—No Coding Required

Analyze Einstein Bots Sessions Easily and More Deeply

Define Bot Question Elements Differently with Slots Renamed to Variables

Train Bots More Easily with a Unified Intent Set Across All Bot Versions

Build Intents Quickly by Adding Customer Inputs with the Data Loader

Understand Your Customers More Quickly—Einstein Bots Support Literal Matches

Channels

LiveMessage: Text Messaging and Facebook Messenger Support Generally Available

Help Center: Simple Self-Service

CTI: Call Centers in Service Essentials and More Flexible Softphones

Live Agent: More Setup Options in Lightning Experience, Support for Skills-Based Routing for Chats (Beta), and a Faster Way to Add Quick Text

Snap-Ins Chat: Custom Labels, Snippet Settings File for Communities, and Chatting Across Tabs

Snap-Ins for Mobile Apps: Use Einstein Bots in Your Native App

Social Customer Service: YouTube, Emojis, Quick Text, and Public Cloud

Field Service

Point Your Workforce to the Next Step with Lightning Flow for Service

Generate Service Reports in Other Languages

Transfer Serialized Product Items (Beta)

Write Service Report Triggers

Quickly Find Signed Service Reports

Automatically Share Service Appointments and Work Orders

View Related Product Transfers on Locations and Product Items

User Profile Image Storage on Android

Field Service Managed Package: Community Dispatchers, Gantt Color Palettes, and Custom Actions for the Dispatcher Console

Case Management

Service Console: Folders for Productivity, Customized Navigation Items, and a Switcher for Lightning Experience

Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track

Cases: Compact Feed Enhancements and Visualforce Templates in Lightning Experience

Omni-Channel: Skills-Based Routing Improvements and Chat Monitoring

Agent Productivity: Folders and Sharing and Buttons, Oh My

Knowledge

Lightning Knowledge Is Included in Service Essentials

Map Case Fields to Data Categories for Better Search Results

Get More Done on Article List Views with Mass Actions

Insert Anchor Links in Rich Text Fields to Help Readers

Customize Articles with Actions, Buttons, and Links (Beta)

Add Lookup Fields to Article Versions from Various Records

Do More from the Articles Related List on Cases

Customize Global Search to Find the Most Relevant Knowledge Data

Import Articles with Translations to Leave No Languages Behind

Move More to Lightning Knowledge—Communities Topics and Article Search Data (Beta)

[Translate Articles Faster with Helpful Links in Emails and Evenly Spaced Columns on Pages](#)

[Access Smart Links in Articles from the Salesforce App](#)

[Stay in Lightning Knowledge to Insert Article Content into Emails](#)

[Use Quick Text in Your Knowledge Articles](#)

Analytics

Reports and Dashboards

[Reports: Einstein Data Insights \(GA\), Enhanced Run Page Improvements \(Beta\), Drill into Your Data, Edit Joined Reports with the Lightning Experience Report Builder \(Beta\)](#)

[Dashboards: More Filter Values, Joined Reports as Source Reports, Custom Axis Ranges and Decimal Precision](#)

[Subscriptions and Folders: Expanded Subscription Options, Quick Search, Folder Enhancements](#)

[Other Reports and Dashboards Enhancements](#)

Einstein Analytics

[Analytics Onboarding and Getting Started: In-App Videos, Welcome Mat, App Navigation](#)

[Analytics App Building: Smart Templates, Custom Maps, Widget Actions](#)

[Analytics Prebuilt Apps: A Plethora of Analytics App Templates, New Template Picker](#)

[Analytics Data Integration: Replication Is Now Data Sync, New Amazon S3 Connector, Faster Path to Insights, Enhanced Navigation in Recipes, Enhanced Sharing Inheritance](#)

[Einstein Discovery: Integrated in Einstein Analytics](#)

Communities

[Communities Documentation: Enjoy a Flurry of Fresh Winter Content](#)

Lightning Communities

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

[Create a Self-Service Help Center and Turn Customers into Search Heroes](#)

[Discover CMS for Community Cloud \(Beta\)](#)

[Koa and Kokua Go Off into the Sunset](#)

[Use Audience Targeting Enhancements](#)

[Export Themes, Just like Whole Sites and Pages](#)

[Do More with Themes and Added Options](#)

[Edit Most Page URLs](#)

[Validate Head Markup as You Type](#)

Lightning Components in Community Builder

[Filter Search Results in Communities](#)

[Enjoy the Give and Take of Discussions in Your Feed](#)

[Allow Guest Users to Access Flows](#)

[Block Deletion of Threads in Communities](#)

Use Rich Publisher Apps on Your Mobile Devices
Let Users Add Topics to Records
Do More with Topics from the List View
Add Topics to Your Original Content (Beta)
Display Related Lists with More Precision
Suggest Actions and Offers to Community Members (Pilot)
Show Salesforce IoT Data to Community Users
Customize Actions on the User Profile Component
Use More Snap-Ins Chat Features in Your Community
Allow Field Service Dispatching from Lightning Communities
Save Time with New Global Actions for Communities
See Field Dependencies While Editing a Record Details Page
Update Subtopic Elements on Headline Component in Your Community
Search and Share List Views and Filter Campaign Related Lists

Community Engagement

Keep Members Engaged with Recognition Badges (Generally Available)
Display Recognition Badges on User Profiles
Award Recognition Badges with the New Give Badge Button
Use the Questions With and Without Answers Report to See Your Community in Action

Files in Lightning Communities

Make Changes to File Fields When You Need To
Populate Custom Fields When Uploading Files
Share Folders Using Public Links

Partner Central

Drive Data Sharing in a Multi-Tier Distribution Channel with Partner Relationships (Pilot)
Manage and Share Brand Information and Include It in Co-Branded Email Templates (Generally Available)
Encourage External Delegated Admins to Manage Their Teams (Generally Available)
Require Unique Usernames for Partners at the Org Level
Ignore the Rules and Allow Greater Flexibility with Budgets
Control Community User Visibility (Beta)
Include Partner Users on Account and Opportunity Teams in Lightning Experience

Sharing and Security

Improve Security for Sites and Communities by Restricting Record Access for Guest Users
Limit Guest User Access to Activities
Use Sharing Sets with All Customer and Partner Licenses (Generally Available)
Use Sharing Sets with Contacts with Multiple Accounts (Beta)
Use Sharing Sets with Campaigns, Opportunities, and Orders (Beta)

- Use the New Content Security Policy to Better Protect Your Community
- Enhance Your Community Privacy with Google IP Anonymizer
- Secure iframes with Clickjack Protection on Sites and Communities
- Enable Users to Log In with Their Email, Phone Number, or Any Identifier You Choose
- Allow Visitors to Join Your Community by Email or Phone
- Customize the One-Time Password Email Template for Identity Verification
- Give Internal Users Login Access to Communities Through an External Authentication Provider
- Set Different Login Policies for Internal Community Users (Generally Available)

Usability and Performance Improvements

- Dependent Picklists No Longer Have a Default Value Selected
- Guest Users Are Redirected to a Login Page When Visiting Record Pages
- Get Faster Page Response with Support for Optional URL Query Parameters
- Decrease Page Load Times with Community Content Delivery Network (Generally Available)

Other Changes in Communities

- Use Lightning External Apps and Lightning External Apps Plus Licenses to Create Custom Digital Experiences
- Find All the Community Content Features in One Workspace Location
- Better Place for Time in Feeds
- Provide Your High-Volume Community Users with Access to Data Privacy Records
- Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time
- Manage Customer User Permission Has Been Removed from All Standard Profiles

Chatter

- Save Your Chatter Posts as Drafts
- Cursor Focus in Chatter Publisher Has Changed

Files

- Share Multiple Files in a Folder Using Public Links
- Track File Stats with the File Engagement Card

Other Changes in Files

- Folders Enabled for All New Libraries

Financial Services Cloud

- Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans
- Gather Customer Insights with Salesforce Surveys
- Get a More Holistic View of Customers with Commercial Banking
- Help Customers Help Themselves with Einstein Bots
- Enhance Rollups

[Financial Services Cloud Has New Objects](#)

[New Financial Services Cloud Object Fields](#)

Customization

[Einstein Next Best Action: Recommend Actions and Offers Using Strategies \(Pilot\)](#)

[Predict What's Next in Your Business with Einstein Prediction Builder \(Beta\)](#)

Lightning App Builder

[Set Component Visibility Based on Standard and Custom User Permissions](#)

[Edit Managed Apps with the Lightning App Builder](#)

[Suggest Actions and Offers to Your Lightning Experience Users \(Pilot\)](#)

[Add the Text Shortcuts Component for Email Application Panes](#)

[Updated Labels in the App Creation Wizard and the Lightning App Builder](#)

[Better Labels for Form Factors in Component Visibility Rules](#)

[Show Users Salesforce IoT Data with the IoT Insights Lightning Component](#)

[Lightning Components No Longer Auto-Added to Pages](#)

Lightning Flow

[Automate More Business Processes with Increased Per-Org Limits](#)

[Monitor Your Processes and Flows with New Usage-Based Entitlements](#)

[Process and Flow Design: New Out-of-the-Box Screen Components, Validation for Custom Screen Components](#)

[Flow Distribution: Recommended Flows, Flows in Einstein Bots, CI/CD Support](#)

[Track Process and Flow Test Coverage](#)

Data Protection and Privacy

[Manage Duplicate Data Privacy Settings Records with the Individual Object](#)

[Provide Your High-Volume Community Users with Access to Data Privacy Records](#)

[Discover Preferences for Consent Across Multiple Records](#)

AppExchange

[Find What's Best for Your Business with Recommended AppExchange Solutions](#)

[Focus Your AppExchange Search Results with Filters](#)

General Setup

[Check a Field's References Before You Edit It \(Pilot\)](#)

[Find Import and Integration Products in a New Setup Page](#)

[See Approval Requests Assigned to Your Queues in All Salesforce Experiences](#)

[Select Multiple Page Layout Assignments in macOS with Command Click](#)

[Enable Japanese Imperial Calendar in Lightning Experience](#)

[Use PATCH in Your External Service Schema](#)

[Add a Namespace Prefix to pageReference.state Properties and Query Parameters](#)

Security and Identity

Authentication and Identity

- Let External Users Log In with Their Phone Number, Email, or Any Identifier You Choose
- Let Visitors Sign Up for Your Community by Email or Phone
- Jazz Up Your Login Pages with a Customized Background Image
- Add Your Own Voice to Salesforce Boilerplate Identity Verification Emails
- Purchase an Add-On License to Verify Identities by SMS
- Give Internal Users Login Access to Communities Through an External Authentication Provider
- Enable OpenID Connect Authentication with Mulesoft Access Management
- Streamline Connected App Integrations with OAuth 2.0 Endpoints (Beta)
- Get Improved Accessibility in the Lightning Experience App Launcher
- Use the REST API to Manage User Identities with SCIM 2.0
- Identify which User Session to Close During SAML Single Logout
- Get JSON-Compliant Values in the UserInfo Endpoint, Identity URL Response, and ID Token
- Set Different Login Policies for Salesforce and Community Users (Generally Available)

Salesforce Shield

- Shield Platform Encryption: More Fields to Encrypt and More API Support, New Cache-Only Key Service
- Event Monitoring: Improved Transaction Policy Wizard and More Accurate Lightning Error Information

Other Security Changes

- Track the Platform Integration User
- Manage Sharing Access with a Session Security Policy
- Update Your Server Cipher Suite to Support AES
- Opt Out of Instanceless My Domain URLs

Salesforce IoT

- Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights
- Easily Send Event Messages from Inside Salesforce IoT
- Verify That Event Messages Are Received with Event Viewer
- Create and Manage Contexts Better with Validation and Activation Enhancements
- Get More Troubleshooting Data with the Enhanced Activity Log
- Include IoT Components in a Managed Package

Development

- Lightning Components: More Flexible CSP Enablement, and Settings for Faster Load Time and Improved Security
- Apex
- Salesforce Extensions for VS Code: Development and Live Debugging Simulations for Any Org, and New Apex Test View

[Salesforce CLI: Join the Evolution](#)

[Dev Hub: Now Available in Developer Edition and Trial Orgs](#)

[Scratch Orgs: More Features and Supported Metadata Types](#)

Visualforce

[Create and Edit Field Sets in Lightning Experience](#)

[New Visualforce Access Metrics Fields](#)

[Securely Retrieve and Display Third-Party Images in Visualforce Pages](#)

[Improve Security by Isolating Untrusted Third-Party Content with iframes](#)

[URL Redirect Parameters Are No Longer Case-Sensitive](#)

Metadata

[Get Metadata Coverage Status for More Channels, Known Issues, and Sample Scratch Org Definitions](#)

[Deploy Using REST](#)

[New Change Set Component](#)

[Metadata API](#)

API

[New and Changed Objects](#)

[SOSL](#)

[REST API](#)

[SOAP API](#)

[Chatter REST API](#)

[Reports and Dashboards REST API](#)

[User Interface API](#)

[Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs](#)

[Salesforce Console API](#)

[Open CTI API](#)

Custom Metadata Types

[Reference Custom Metadata Types in Advanced Formula Fields](#)

[Instantiate Custom Metadata Types in Apex](#)

Sandboxes

[Include Asset Files in Full Sandbox Tests](#)

Packaging

[Patch Version Numbers in Unlocked Packages Are Supported](#)

[Extract Dependency Information for Unlocked Packages](#)

[More Metadata Components Are Hard-Deleted in Unlocked Packages](#)

[Enable Migration of Deprecated Metadata in Unlocked Packages](#)

[Lock Down Information During Installation of Installation-Key-Protected Unlocked Packages](#)

[Adopt Instanceless My Domain URL Best Practices](#)

Enterprise Messaging

[Scale Your Event-Based Apps with High-Volume Platform Events \(Generally Available\)](#)

[Receive Streaming Events in Your Lightning Component](#)

[Keep Your External Data Up to Date with Change Data Capture \(Generally Available\)](#)

Doc Content

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

[Introducing the Salesforce Engage Implementation Guide](#)

What's Different or Not Available in Winter '19 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. We'll update the full list of feature gaps and limitations in the Salesforce Help soon!

EDITIONS

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

IN THIS SECTION:

[Sales Features: Lightning Experience Considerations](#)

[Productivity Features: Lightning Experience Considerations](#)

Sales Features: Lightning Experience Considerations

Learn about the issues that your Sales team can encounter in Lightning Experience.

Accounts

Change Owner

- Changing the account owner doesn't change the account team.
- Changing the account owner doesn't change the opportunity team on any opportunities transferred to the new owner.
- The option to transfer closed opportunities owned by the existing account owner is not available.
- The option to transfer cases owned by the existing account owner is not available.

Features Not Available in Lightning Experience

- Create or edit account team member page layouts.
- Copy Billing Address to Shipping Address link

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

Event Series (Beta) and Recurring Events

 **Note:** As a beta feature, event series in Lightning Experience is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use event series 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.

Events that repeat have different names and behavior depending on where you create them. In Lightning Experience, they're called event series. In Salesforce Classic, they're called recurring events.

- Platform Encryption, including deterministic encryption, isn't supported for event series. Single events in Lightning Experience, the Salesforce app, and all events in Salesforce Classic are encrypted.
- If you don't see changes when you create, edit, or delete a series, click the refresh button.
- To load your calendar quickly, some series are initially projected in Salesforce and only visible on your calendar later. As a result, even after refreshing, sometimes you don't see all events from the series on your calendar immediately after saving. You can experience similar delays when deleting or editing your events. For example:
 - If you schedule a series that lasts longer than a year, you can see events that are scheduled within the next year. To see subsequent events in the series, check your calendar when those events are within a year of occurring.
 - If your admin has enabled shared activities (which lets you associate multiple contacts or one lead to your events), some events from the series can take up to two minutes to display on your calendar.
- Only the first event in a series shows attachments.
- Events in a series can't be made to overlap with other events in the series.
- If you create a series in Lightning Experience and edit it from Salesforce Classic, you can only edit a single event from the series. We recommend editing in Lightning Experience only.
- You can't edit the start date of a series. Instead, delete the series and recreate it with a new start date.
- If you edit any fields other than the following for an event series, only events repeating within the series pattern display the updated field values. Exceptions to the series and past events display the original series field values.
 - All-day event checkbox
 - Start or end time
 - Recurrence pattern
 - Recurrence start or end date
 - Location
- A single series event can last up to 14 days unless your admin has enabled limits for event duration. In that case, you can't create an event that lasts more than 24 hours.
- If you delete a series, events in the series that haven't started yet are removed.
- To delete a single event, open the event you want to delete. Then, change the date, time, or location of that event. Save your changes. Then, open the event again and delete the event.
- When records are merged or a lead is converted for attendees, the original record is maintained on the event series. As long as the email address is identical for the merged contacts or converted lead, no issues should occur.
- If you have any custom fields on the event page layout or have defined default values for custom fields on the Activity object, we recommend not enabling this feature in Winter '19.

- Event series aren't supported for quick actions.
- Editing the Assigned To field for an event series causes issues. Instead, to reassign an event series, delete the series and recreate it with the desired owner.

Essentials: In-App Trailhead Badges, Subscription Management, and Improvements in Sales and Service

Stay in the app to celebrate, set up, and subscribe to Salesforce Essentials with in-app Trailhead badging, improved setup flows and a new subscription page. In Sales Essentials, tackle more tasks with improved setup flows. In Service Essentials, create a self-service help center and use CTI to let agents make calls from their computers with a softphone.

IN THIS SECTION:

[Celebrate Learning with In-App Trailhead Badges](#)

Hip-hip hooray! Your team will now receive a badge when they learn more about Essentials with in-app Trailhead badging. For example, when they complete the setup assistant, they'll see a shiny new badge on their Trailhead profiles.

[Manage Your Essentials Subscription Without Leaving Salesforce](#)

Meet your new hub for your Salesforce subscription: the Manage Subscription page. View and update your subscription information without leaving Salesforce. If you want to cancel your subscription (we hope you don't!), submit your request right from the page.

[Sales Cloud Essentials: Setup Improvements, Badges for Progress](#)

Set up and get started faster than ever with improved flows for deleting sample data and adding custom fields. Along the way, celebrate your team's wins with in-app Trailhead badging. These changes apply to Lightning Experience only.

[Service Cloud Essentials: Help Center for Self-Service, CTI Availability](#)

Create and manage self-service help centers where your customers can help themselves. Create call centers to empower users to make telephone calls from their computers with a softphone.

Celebrate Learning with In-App Trailhead Badges

Hip-hip hooray! Your team will now receive a badge when they learn more about Essentials with in-app Trailhead badging. For example, when they complete the setup assistant, they'll see a shiny new badge on their Trailhead profiles.

Manage Your Essentials Subscription Without Leaving Salesforce

Meet your new hub for your Salesforce subscription: the Manage Subscription page. View and update your subscription information without leaving Salesforce. If you want to cancel your subscription (we hope you don't!), submit your request right from the page.

Where: The Manage Subscription page is available in Lightning Experience in Essentials Edition.

How: From Setup, click **Manage Subscription**.

Sales Cloud Essentials: Setup Improvements, Badges for Progress

Set up and get started faster than ever with improved flows for deleting sample data and adding custom fields. Along the way, celebrate your team's wins with in-app Trailhead badging. These changes apply to Lightning Experience only.

IN THIS SECTION:

[Create Custom Fields Fast](#)

Set up custom fields in a snap with an enhanced setup flow. With custom fields, your records, reports, and dashboards are tailored to your business. Adding custom fields allows reps to see all the information they need to close their next deal. And don't forget, the added detail also gives you more targeted insights about your business in your reports and dashboards.

[Delete Trial Data in a Jiffy](#)

Make sure that your data is just that, yours. Sample data is great for when you're learning but can throw off your real data after you're ready to use the app. With a click of a button, remove the trial data that we include to help you learn about the product.

[Sync Your Emails and Activities](#)

Work smarter with the new setup flow for Einstein Activity Capture. It helps you sync your email and activities so you don't need to switch between applications.

Create Custom Fields Fast

Set up custom fields in a snap with an enhanced setup flow. With custom fields, your records, reports, and dashboards are tailored to your business. Adding custom fields allows reps to see all the information they need to close their next deal. And don't forget, the added detail also gives you more targeted insights about your business in your reports and dashboards.

Where: This change applies to Lightning Experience in Essentials Edition.

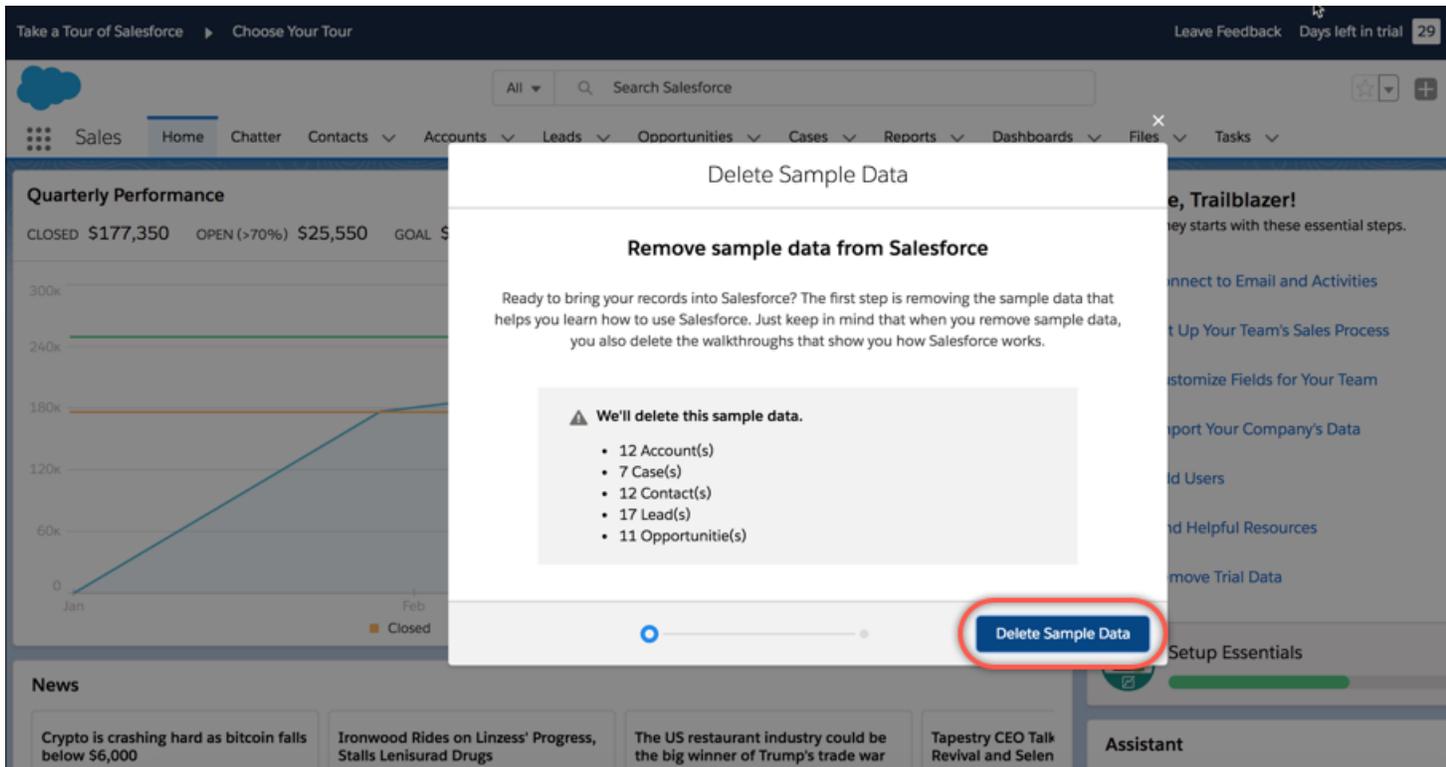
How: Select **Create Custom Fields**. There you're prompted to select which object to customize.

Delete Trial Data in a Jiffy

Make sure that your data is just that, yours. Sample data is great for when you're learning but can throw off your real data after you're ready to use the app. With a click of a button, remove the trial data that we include to help you learn about the product.

Where: This change applies to Lightning Experience in Essentials Edition.

How: After you've finished your trial with Essentials, you're prompted to remove sample data. Click **Delete Sample Data**.

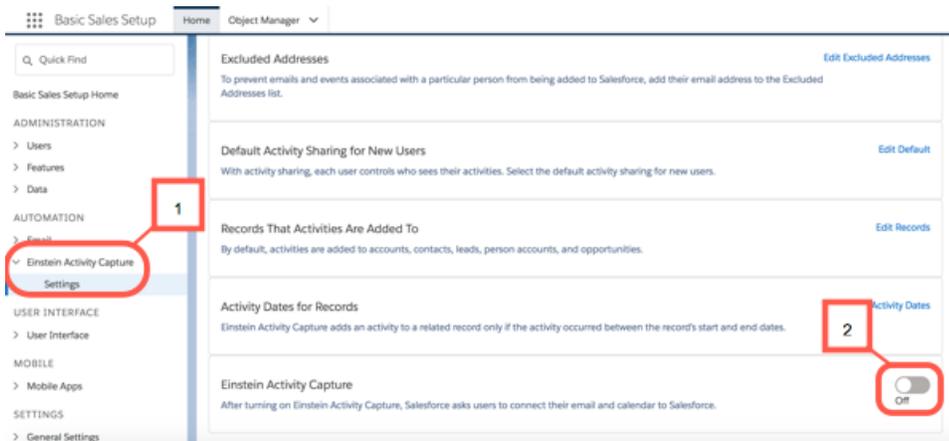


Sync Your Emails and Activities

Work smarter with the new setup flow for Einstein Activity Capture. It helps you sync your email and activities so you don't need to switch between applications.

Where: This change applies to Lightning Experience in Essentials Edition.

How: Click  and go to Basic Setup. From Setup, enter Einstein Activity Capture in the Quick Find box, and then select **Settings** (1). Scroll to the bottom of the page and switch the feature on (2).



Service Cloud Essentials: Help Center for Self-Service, CTI Availability

Create and manage self-service help centers where your customers can help themselves. Create call centers to empower users to make telephone calls from their computers with a softphone.

IN THIS SECTION:

[Let Customers Be Self-Sufficient with Help Center](#)

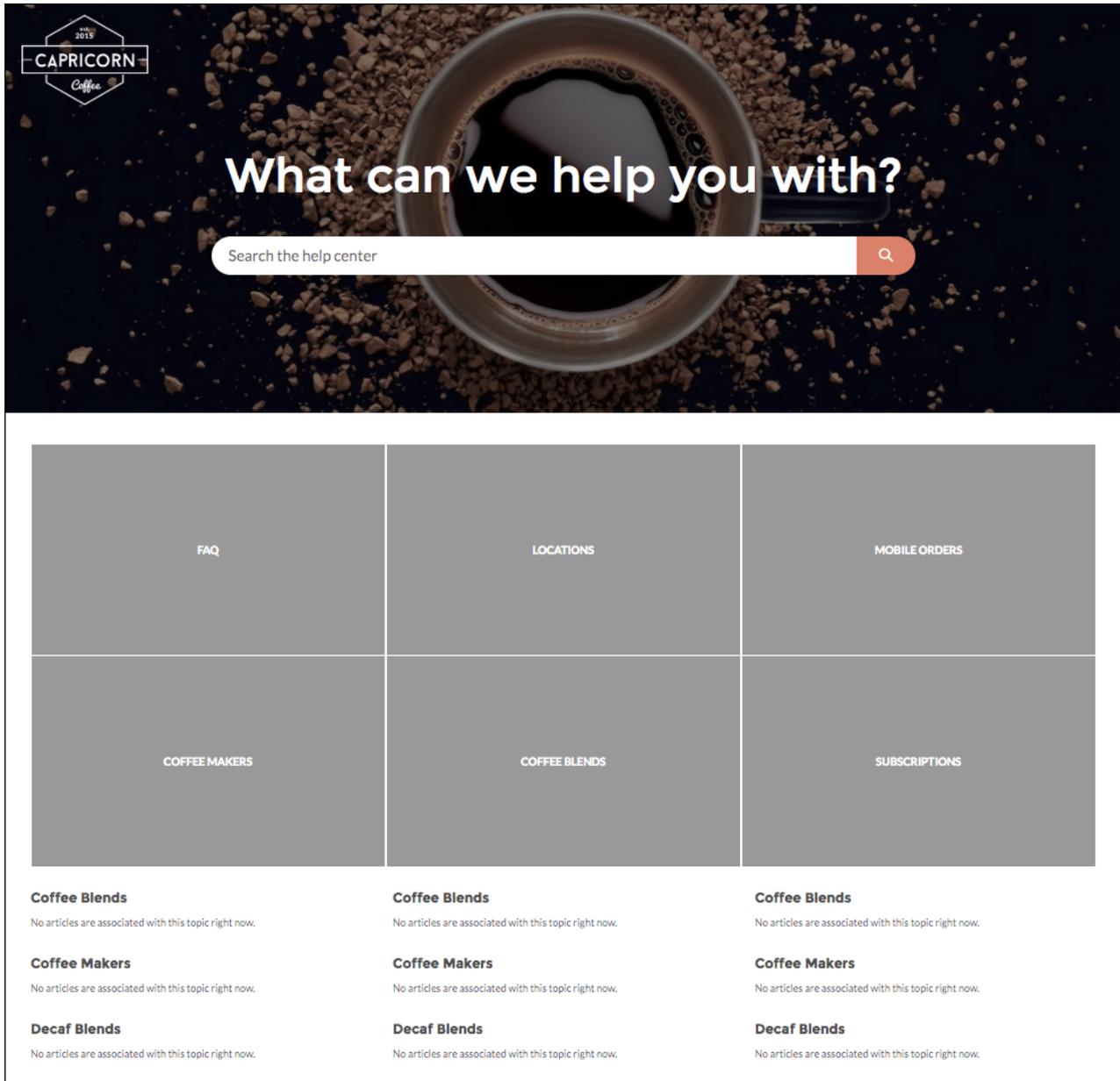
Create a self-service help center for your company where customers can browse articles and answer their own questions before they reach out for help. You can include a contact button for those tricky questions that need human intervention. The contact button creates a Case in Salesforce, so you or someone on your team can look into the issue. Manage your help centers from the new Help Center page in Setup.

[Use CTI in Service Essentials](#)

Empower users to make telephone calls from their computers with a softphone. Apex isn't supported, so your Open CTI implementation can't invoke the `RunApex` method.

Let Customers Be Self-Sufficient with Help Center

Create a self-service help center for your company where customers can browse articles and answer their own questions before they reach out for help. You can include a contact button for those tricky questions that need human intervention. The contact button creates a Case in Salesforce, so you or someone on your team can look into the issue. Manage your help centers from the new Help Center page in Setup.



Where: This feature is new in Lightning Experience in Essentials Edition. The Help Center setup page is available in Essentials Edition. The Help Center template and setup flow are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: Go to the Help Center page in Setup and click **New** to launch a guided setup flow.

Use CTI in Service Essentials

Empower users to make telephone calls from their computers with a softphone. Apex isn't supported, so your Open CTI implementation can't invoke the `RunApex` method.

Where: This change applies to Essentials Edition.

Who: To create a call center, you need the Manage Call Centers permission.

Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection

Improvements and new features in Einstein Forecasting, Activity Capture, Bots, and Analytics give you greater flexibility, quicker setup, and easier insights. Take a look at the brains we packed into your business machine.

Sales

Einstein Forecasting: Optimize Your Forecasting Model with Custom Fields

Einstein now uses your custom opportunity fields to provide more accurate forecast predictions. If you have opportunity fields that aren't relevant to closing deals, a new setup wizard lets you ignore specific custom opportunity fields.

Einstein Activity Capture: Get More from Einstein Email Insights and Connect with Recommended Connections

Customize email insights to fit your business. Sales reps can take action from insights and leave feedback there. Plus, find new business by seeing which colleagues are connected to a prospect.

Einstein Readiness Assessor: Run the Readiness Assessor in Sandbox

When you run the Einstein Readiness Assessor in sandbox, you know which Sales Cloud Einstein features are ready to be turned on in sandbox. Sandbox environments are best suited for testing how Sales Cloud Einstein features work with your architecture, workflows, and Lightning components. We recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox because the data in sandbox environments is limited. Instead, evaluate the model in a production org that has the required amount of historical data.

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

Einstein Insights are now available when you're on the go! Reps can stay informed with important updates, and take action directly from the insights, including editing the related record or sending emails.

Service

Supercharge Your Bot with Autolaunched Flows—No Coding Required

Bring your automated processes to Einstein Bots. Call autolaunched flows from your bot dialogs. Open a case, update a contact, or trigger a journey, right in the chat conversation.

Analyze Einstein Bots Sessions Easily and More Deeply

Session logs record the details of your bot for a given session. Use the logs when building your bot to confirm the steps. And before you put your bot to work, event tracking helps you debug the interaction design.

Define Bot Question Elements Differently with Slots Renamed to Variables

For greater flexibility in how Einstein Bots gather, manage, and store data, slots are renamed variables and no longer require an associated entity. Don't worry—you don't have to update your current bots. For existing bots, we handle the change for you. For new bots, you use a slightly different process to create Question elements that gather customer data.

Train Bots More Easily with a Unified Intent Set Across All Bot Versions

All Einstein Bot versions now share a single bot intent set. To add customer inputs, you previously had to update the intents for each bot version. Now with unified intents, each bot version learns from the unified intent set. If you currently have multiple bot versions, we moved them into standalone bots. New versions share an intent set.

Build Intents Quickly by Adding Customer Inputs with the Data Loader

If you use dialog intents to understand what your customers want, you need at least 150 inputs to build an effective intent model. Adding all these customer inputs manually is tedious and time consuming. One way to add customer inputs more quickly is with the Data Loader.

Understand Your Customers More Quickly—Einstein Bots Support Literal Matches

It takes effort to identify all the different ways customers ask for help. You expect your bot to understand every variation that you add to your dialog intents. With literal matching, your Einstein bot looks for an exact match for what the customer types in chat. If the bot finds the precise customer input in a dialog intent, it launches the corresponding dialog.

Analytics

Einstein Discovery: Integrated in Einstein Analytics

Einstein Discovery is fully integrated into Einstein Analytics. Now you create stories from Analytics datasets, and navigate stories, investigate insights, visualize data, and discover predictions—all within the familiar Einstein Analytics interface. Learn to enhance your models by examining metrics that reveal their statistical basis and performance, and manage goals and models that you have deployed to Salesforce using the new Model Manager.

Expedite Data Visualization with Conversational Queries (Generally Available)

Type a word or two, click a suggested data query, and instantly view answers in a chart or table. Conversational exploration is that easy, and it's now generally available. In addition, you see enhancements such as in-context query help and more options for date filters.

Do More from the Dataset Edit Page

The dataset edit page is now the central launchpad for all your dataset tools. More tools are available and everything is at the top of the page within easy reach. Start a recipe, create a story in Einstein Discovery, or explore the data in a lens, all from the dataset edit page.

Fast-Track Your Data from a CSV File to a Lens, Recipe, or Story

From zero to insights: Upload your external data, and start exploring or preparing in fewer clicks. Track the upload status as you go. Land on the dataset's edit page, from where you can start a recipe or a story in Einstein Discovery, or explore the data.

Customization

Einstein Next Best Action: Recommend Actions and Offers Using Strategies (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 service agents have multiple ways to assist customers, and you want to guide the agent to the most appropriate action. Consider using Einstein Next Best Action.

Predict What's Next in Your Business with Einstein Prediction Builder (Beta)

Einstein Prediction Builder continues its beta program in this maintenance release. When you buy Einstein Analytics Plus or Einstein Predictions, you get Einstein Prediction Builder for free.

Sales: Enhancements to Forecasting, Email Integration, Salesforce CPQ, and Pardot

Custom fields in Einstein Forecasting make Salesforce more intelligent. Measure sales performance with territory-based quotas and forecasts. Extend the world's No. 1 CRM to email and calendar via integration with Microsoft® and Google. Build recurring relationships with your customers with CPQ Evergreen Subscriptions. And get smarter marketing automation with Pardot in Lightning Experience.

IN THIS SECTION:

[Sales Cloud Einstein: Custom Opportunity Fields in Forecast Predictions, Improved Email Insights, and Sandbox Support of Readiness Assessor](#)

See more accurate forecast predictions now that custom opportunity fields are used in the Einstein Forecasting model. Einstein Activity Capture users enjoy several upgrades to Einstein Email Insights. And you can run the Einstein Readiness Assessor in sandbox.

[Core Sales Features: Territory Forecasts, Improved Account Team Management, and Enhancements to Campaigns](#)

Forecast sales by territory. Add multiple account team members simultaneously. Keep Pardot and Salesforce campaign members in sync. Plus, stop spammers from sending you bogus leads. Manage opportunity teams more easily in Lightning Experience. And Customizable Forecasting and the original territory management feature are scheduled for retirement as of Summer '20.

[Productivity Features: Bounced Email Address Alerts, Email Tracking Options, and Call Recording](#)

See a bounce warning when an email doesn't go through due to a bad email address. Know if emails are being opened, and when. Record calls with Lightning Dialer for training and quality control.

[Lightning Data: Match Selection, More Usable Labels](#)

Sales reps can now control matches between Lightning Data records and your accounts or leads. And changes to some labels make Lightning Data easier to use.

[Integration with Google: Increased Productivity While Composing Emails and Sync for API-Triggered Changes](#)

Get your reps working their Salesforce deals directly in Gmail™ and Google Calendar. If you've customized Salesforce to create or edit events through the API, now those changes sync with reps' calendars. Lightning for Gmail includes the option to upgrade to a premium experience, which includes a suite of features to increase your reps' productivity when composing emails.

[Integration with Microsoft®: Outlook Integration with Inbox Features General Availability, Event Series Sync, Salesforce for Outlook Availability Change](#)

The Outlook integration with Inbox is now generally available and brings together the best features of Outlook integration and Salesforce Inbox in one solution. Improvements to Lightning Sync mean more of your sales reps' events sync. If you've never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer offered. But our latest products, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync, are ready to serve you. Connect for office enters retirement in early 2019.

[Salesforce CPQ and Billing: More Subscription Options and Pricing Strategies and Enhancements to Invoicing and Payment Gateway](#)

Create subscriptions that never expire, and price products based on usage. Save time with pre-populated order fields in Lightning. Explore expanded functionality for tracking gateway responses, consolidating billing transactions across new orders and order cancellations, and more.

[Pardot: Lightning Experience, Easier Opt-In, Engagement Program Conversion, Campaign Member Sync, and More Goodies](#)

Pardot in Lightning Experience is generally available! New settings let you opt in synced prospects easily. Engagement Studio makes it a snap to convert programs to allow prospect reentry and offers date filters for stats. Sync prospects straight to Salesforce as campaign members, and look for some spiffed up dashboards around the product. The latest version of Lightning Design System brings minor UI changes to Pardot.

Sales Cloud Einstein: Custom Opportunity Fields in Forecast Predictions, Improved Email Insights, and Sandbox Support of Readiness Assessor

See more accurate forecast predictions now that custom opportunity fields are used in the Einstein Forecasting model. Einstein Activity Capture users enjoy several upgrades to Einstein Email Insights. And you can run the Einstein Readiness Assessor in sandbox.

IN THIS SECTION:

[Einstein Forecasting: Optimize Your Forecasting Model with Custom Fields](#)

Einstein now uses your custom opportunity fields to provide more accurate forecast predictions. If you have opportunity fields that aren't relevant to closing deals, a new setup wizard lets you ignore specific custom opportunity fields.

[Einstein Activity Capture: Get More from Einstein Email Insights and Connect with Recommended Connections](#)

Customize email insights to fit your business. Sales reps can take action from insights and leave feedback there. Plus, find new business by seeing which colleagues are connected to a prospect.

[Einstein Readiness Assessor: Run the Readiness Assessor in Sandbox](#)

When you run the Einstein Readiness Assessor in sandbox, you know which Sales Cloud Einstein features are ready to be turned on in sandbox. Sandbox environments are best suited for testing how Sales Cloud Einstein features work with your architecture, workflows, and Lightning components. We recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox because the data in sandbox environments is limited. Instead, evaluate the model in a production org that has the required amount of historical data.

[Einstein Lead Scoring: Update the Einstein Lead Scoring Dashboard](#)

We improved the Einstein Lead Scoring dashboard so the results include only your leads that have scores. Previously, leads without scores were included. Upgrade the dashboard to get the most accurate data.

[Einstein Insights: Access Account and Opportunity Insights from Your Mobile Device \(Beta\)](#)

Einstein Insights are now available when you're on the go! Reps can stay informed with important updates, and take action directly from the insights, including editing the related record or sending emails.

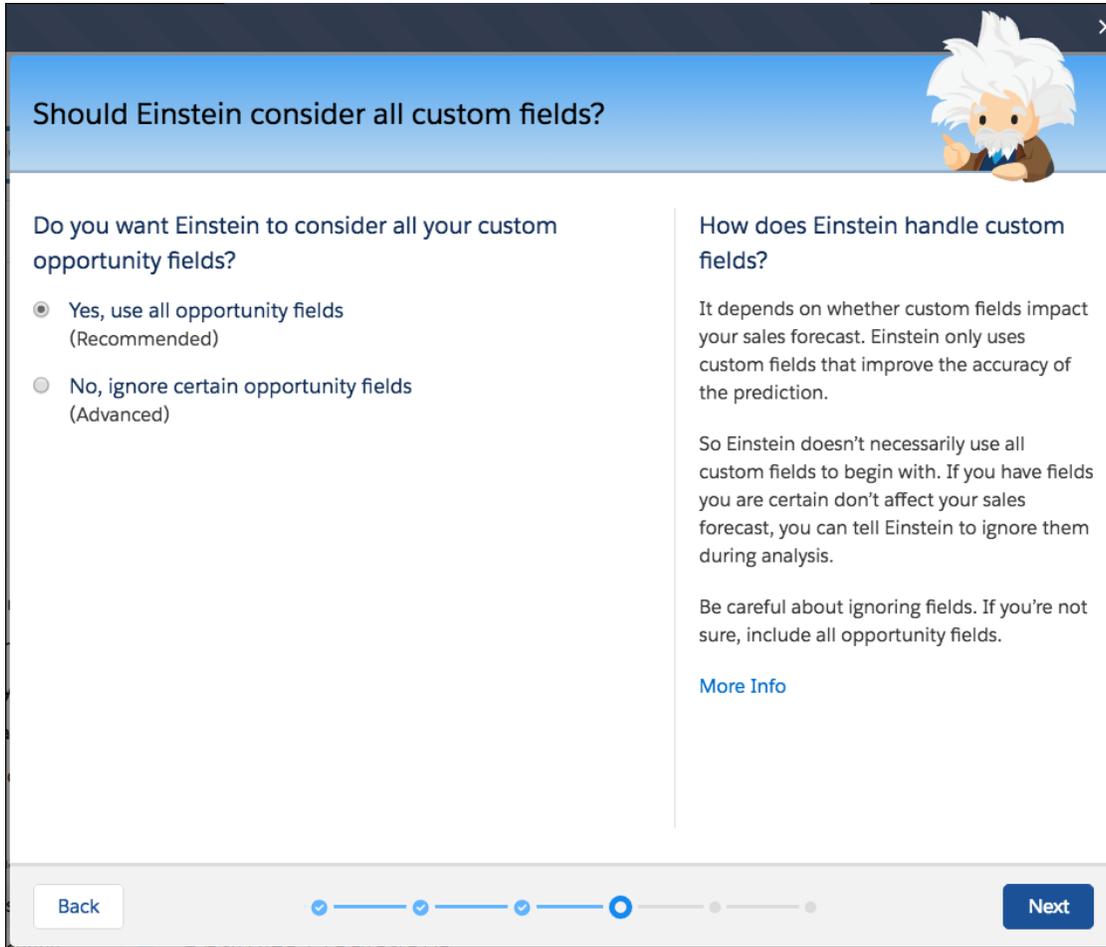
Einstein Forecasting: Optimize Your Forecasting Model with Custom Fields

Einstein now uses your custom opportunity fields to provide more accurate forecast predictions. If you have opportunity fields that aren't relevant to closing deals, a new setup wizard lets you ignore specific custom opportunity fields.

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

Who: Einstein Forecasting is available to sales managers with the Sales Cloud Einstein license.

Why: Einstein uses only the fields that affect your sales forecast, so custom fields that don't impact forecast predictions aren't used in the forecasting model. If you have custom fields that aren't relevant to forecasting but can affect your sales forecast, you can exclude them from the forecasting model.



Ignore fields only if you are sure they have no effect on a deal's chance of closing. Mistakenly ignoring influential fields makes Einstein's forecasting prediction less accurate. If you're not sure, include all opportunity fields.

Fields that are ignored for Einstein Forecasting are also ignored for Einstein Opportunity Scoring.

How: Relevant custom fields are automatically used to calculate forecast predictions. To exclude specific fields from being used by the predictive model, go to the Einstein Forecasting page in Setup, and click **Set Up** in the Optimize Predictions section.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Einstein Activity Capture: Get More from Einstein Email Insights and Connect with Recommended Connections

Customize email insights to fit your business. Sales reps can take action from insights and leave feedback there. Plus, find new business by seeing which colleagues are connected to a prospect.

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

Why: For details on these enhancements, see the [main Einstein Activity Capture entry](#) in the Sales Productivity section.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

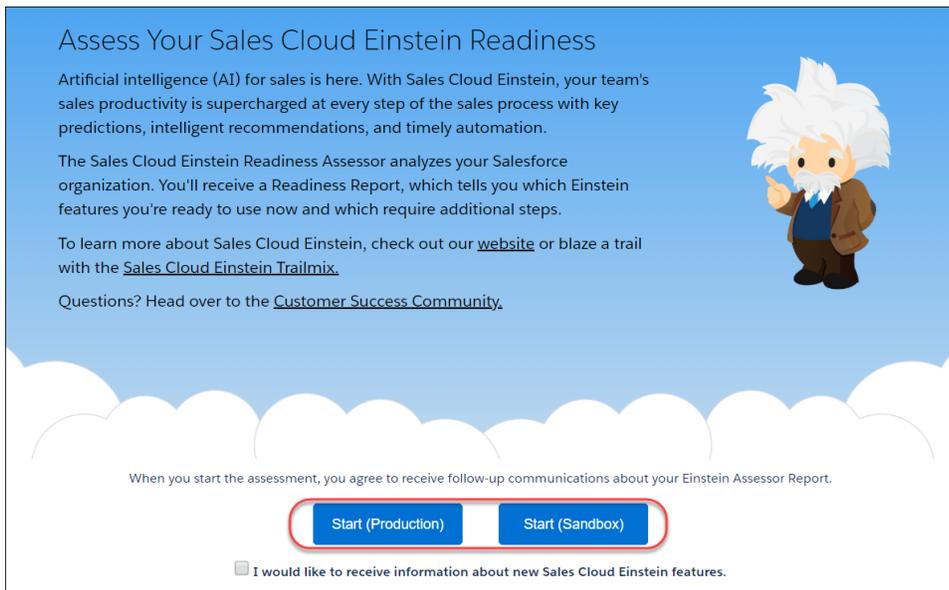
Einstein Readiness Assessor: Run the Readiness Assessor in Sandbox

When you run the Einstein Readiness Assessor in sandbox, you know which Sales Cloud Einstein features are ready to be turned on in sandbox. Sandbox environments are best suited for testing how Sales Cloud Einstein features work with your architecture, workflows, and Lightning components. We recommend that you don't evaluate the performance of the Einstein model based on what you see in sandbox because the data in sandbox environments is limited. Instead, evaluate the model in a production org that has the required amount of historical data.

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

Who: This feature is available to users with the Customize Application permission.

How: From the Readiness Assessor in Setup, choose whether to run the assessment in production or sandbox.



SEE ALSO:

[Salesforce Help: Run the Sales Cloud Einstein Readiness Assessor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Einstein Lead Scoring: Update the Einstein Lead Scoring Dashboard

We improved the Einstein Lead Scoring dashboard so the results include only your leads that have scores. Previously, leads without scores were included. Upgrade the dashboard to get the most accurate data.

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

Who: To update the Einstein Lead Scoring dashboard, users need the Use Analytics permission and Manager access to the app.

How:

1. Open the Einstein Lead Scoring Analytics app. A notification appears if your app is out of date.
2. In the notification, click **What's new**. Or on the app's home page, click **New version available** in the left column.
3. At the bottom of the page, do one of the following.
 - To overwrite your current app and all its assets, click **Upgrade current app**. Upgrading your app also deletes customizations, including new fields or objects that you added to the dataflow or changes to security settings and dashboard labels and colors.
 - To copy your current app, click **Create new app**. The copy uses the new version.



Warning: If you customized your app, we recommend using **Create new app** to preserve your customizations. You can then manually copy your customizations into the new version of the app.

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

Einstein Insights are now available when you're on the go! Reps can stay informed with important updates, and take action directly from the insights, including editing the related record or sending emails.

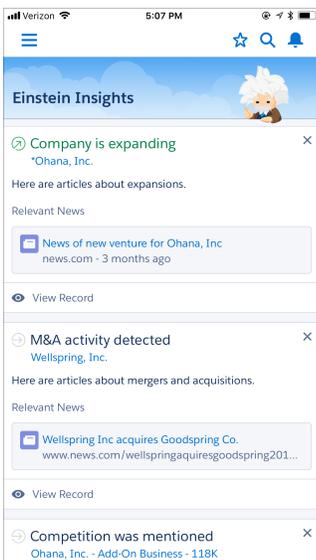
Where: This change applies to Salesforce for Android and Salesforce for iOS, in Enterprise, Performance, and Unlimited editions.



Note: As a beta feature, Einstein Insights 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.

When: Account and opportunity insights are visible with the Salesforce for Android and iOS version 17.0 release. Be sure to download the latest version to use Einstein Insights in mobile.

Why: To access insights, tap  in the left nav.



Sales reps can see predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place.

Reps can also see insights from record pages. Changes to insights automatically sync between desktop and mobile.

How: Enable the feature from the Einstein Opportunity Insights or Einstein Account Insights page in Setup. You need Sales Cloud Einstein licenses to view insights in the mobile app. Sharing actions, activity timeline details, and suggested contact insights are available in Lightning Experience only. The email action isn't available from news-based account insights.

 **Note:** It takes up to 24 hours to see the initial batch of insights. If you see the Einstein Insights component, but it's still empty after 24 hours, there aren't any insights available for your opportunities or accounts.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Core Sales Features: Territory Forecasts, Improved Account Team Management, and Enhancements to Campaigns

Forecast sales by territory. Add multiple account team members simultaneously. Keep Pardot and Salesforce campaign members in sync. Plus, stop spammers from sending you bogus leads. Manage opportunity teams more easily in Lightning Experience. And Customizable Forecasting and the original territory management feature are scheduled for retirement as of Summer '20.

IN THIS SECTION:

[Collaborative Forecasts: Territory Forecasting \(Generally Available\), Forecast Sharing \(Generally Available\), and an Enhanced Forecasts Page](#)

Forecast sales by territory. Share your forecasts with colleagues. And get more information and improved navigation on the forecasts page.

[Enterprise Territory Management: Forecast Sales by Territory \(Generally Available\)](#)

Territory Forecasting gives your team a snapshot of how expected opportunity revenue compares between sales territories. Want to know which territory has the most in closed deals this month? Use Territory Forecasting to find out.

[Accounts: Multiple Team Members and Partner Users on Account Teams](#)

Your sales reps can add multiple team members simultaneously, and they can add partner users to account teams.

[Campaigns: Sync Pardot and Salesforce Campaign Members and Quickly Adjust Filters on Campaign Related Lists](#)

Keep your connected Pardot and Salesforce Campaigns' member lists in sync and easily make temporary changes to Campaigns related list filters.

[Leads: Reject Leads That Don't Use reCAPTCHA](#)

Stop spammers from sending you bogus leads. Reject leads that generate from Web-to-Lead that don't use reCAPTCHA verification.

[Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams](#)

Sales teams can keep the previous opportunity team together when an opportunity is transferred to a new owner, and they can add partner users to teams.

[Other Changes in Core Sales Features](#)

Customizable Forecasting and the original territory management feature are scheduled for retirement as of Summer '20. Install the LinkedIn Sales Navigator AppExchange package from Setup. In Enterprise Territory Management, list your territories' opportunities quickly, and then report on them. And manage your territories more easily in Lightning Experience.

Collaborative Forecasts: Territory Forecasting (Generally Available), Forecast Sharing (Generally Available), and an Enhanced Forecasts Page

Forecast sales by territory. Share your forecasts with colleagues. And get more information and improved navigation on the forecasts page.

IN THIS SECTION:

[Forecast Sales by Territory \(Generally Available\)](#)

Territory Forecasting gives your team a snapshot of how expected opportunity revenue compares between sales territories. Want to know which territory has the most in closed deals this month? Use Territory Forecasting to find out.

[Share Your Forecasts \(Generally Available\)](#)

Make sure that everyone who needs to can view, adjust, and report on your forecasts.

[Get More from the Forecasts Page](#)

The forecasts page now includes a timestamp, breadcrumbs, and other features that improve navigation.

Forecast Sales by Territory (Generally Available)

Territory Forecasting gives your team a snapshot of how expected opportunity revenue compares between sales territories. Want to know which territory has the most in closed deals this month? Use Territory Forecasting to find out.

Where: This change applies to Lightning Experience in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

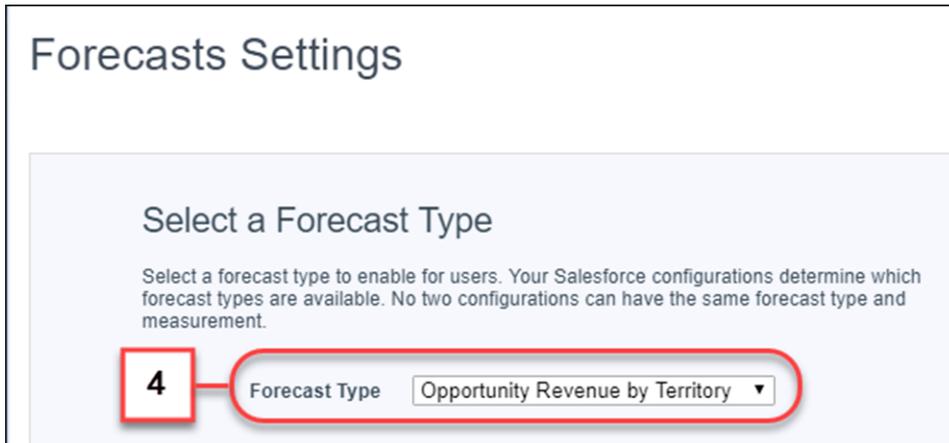
Who: If your sales team uses Enterprise Territory Management, they can forecast opportunity revenue by territory and by role.

Why: When territory forecasts are enabled, users can:

- See an opportunity revenue forecast rollup based on the territories assigned to each opportunity.
- See opportunity revenue forecasts for the territories that users are assigned to.
- See the opportunities included in territory forecasts regardless of whether the opportunity owner is assigned to the territory.
- Drill down to child territories' forecasts.
- Drill down to an individual rep's forecasts for a territory if the territory doesn't have a forecast manager.

Months	Closed Only	Commit Forecast	Best Case F
Total: 2 Months	\$550,000.00	\$550,000.00	\$550,000.00
October FY 2018	\$550,000.00	\$550,000.00	\$550,000.00
Nob Hill (Greg No...)	\$0.00	\$0.00	
North Beach (Gre...)	\$550,000.00	\$550,000.00	\$550,000.00
November FY 2018	\$0.00	\$0.00	

Territory forecasts (1) are based on your territory hierarchy (2), not your user role hierarchy, as other forecast types are. Users switch from role-based forecasts to territory forecasts by selecting **Opportunity Revenue by Territory** under Forecast Type in Display Settings (3).

How:

To make territory forecasts available to your sales team, add the opportunity revenue by territory forecast type in Setup (4).

Changes Since Summer '18

- Adjustments and adjustment notes are supported.
- Users can view forecasts for each territory that they're associated with.
- Users can search by territory name or by the territory's forecast manager's name and jump to another territory's forecasts.
- Users can switch back to a territory's forecasts using breadcrumbs.
- On the forecasts page and in Setup, the new forecast type is listed as Opportunity Revenue by Territory, not the active territory model's name.

[Chatter REST API](#) supports territory forecasts.

SEE ALSO:

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

[Salesforce Help: Enable and Set Up Territory Forecasts \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Assign Forecast Managers to Territories \(can be outdated or unavailable during release preview\)](#)

Share Your Forecasts (Generally Available)

Make sure that everyone who needs to can view, adjust, and report on your forecasts.

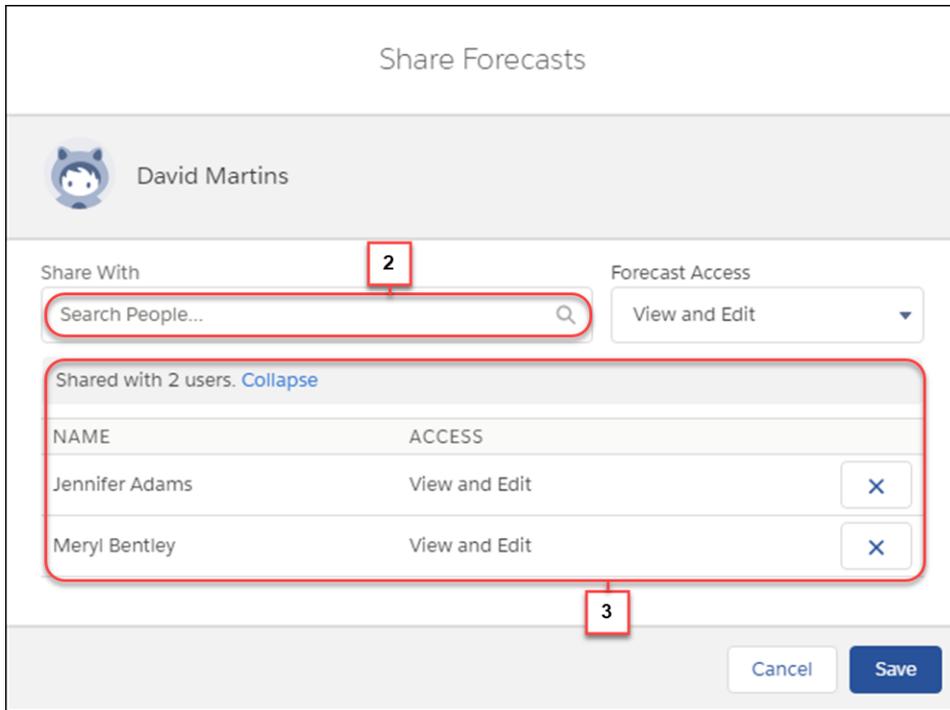
Where: This change applies to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Who: Forecast managers in your role-based forecasts hierarchy can share their forecasts page with any Salesforce user at your company.

Why: Here's an example. David can share his forecasts with Jennifer, a stakeholder in Sales Ops. And when he leaves on vacation, he shares with Meryl, a coworker who's covering for him.



On the forecasts page, click the Share button (1).



Select a coworker to share with (2) and an access level: **View Only** or **View and Edit**. Users with View and Edit access can make adjustments. Manage your shared forecasts via the Share Forecasts popup, where you can stop sharing forecasts by clicking  (3).



To view forecasts that are shared with you, select a coworker from the My Shared Forecasts list (4) on the forecasts page.

How: If you've got Collaborative Forecasts set up, no additional setup is required for sharing.

Changes Since Summer '18

- Access forecast sharing on the forecasts page. Forecast sharing is no longer limited to the API.
- When you share forecasts, you specify whether your coworkers can adjust forecasts or only view them.

SEE ALSO:

[Salesforce Help: Share Forecasts and Manage Shared Forecasts \(can be outdated or unavailable during release preview\)](#)

Get More from the Forecasts Page

The forecasts page now includes a timestamp, breadcrumbs, and other features that improve navigation.

Where: These changes apply to Lightning Experience in Professional, Performance, and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why:

The screenshot shows the Salesforce Forecasts page for David Martins. It features a breadcrumb trail (1) 'DAVID MARTINS > MERYL BENTLEY', a header for the selected forecast type 'Opportunity Revenue' (2), a search bar for other users' forecasts (3), a share button (4), a timestamp '37 AM' (5), and a 'Show Rows with All Zero Values' option (6) in the display settings menu. The main table shows forecast data for October and November FY 2018, including a table for 'David Martins Team' with columns for Opportunity Name, Account Name, Amount, Close Date, Stage, Probability, and Forecast.

- Breadcrumbs provide context by showing where your view falls within the forecasts hierarchy (1). Click a breadcrumb to switch to a relevant page.
- The header lists the forecast type you've selected (2). No more checking Display Settings to find out.
- New search capabilities make it easy to find forecasts (3). If territory forecasts are enabled, type three or more letters in the search field to get both user and territory names in your results.
- The Share button lets forecast managers in the role-based forecasts hierarchy share their forecasts page with stakeholders (4).
- A timestamp indicates the date and time when the page was refreshed (5). In-progress data updates aren't indicated.
- Rows that contain only zeros are hidden, except for rollups of subordinates and child territories. That means no more scrolling through the grid to find meaningful data. To show the all-zero rows, select **Show Rows with All Zero Values** in Display Settings (6).

How: If you've got Collaborative Forecasts set up, no additional setup is required to get these enhancements.

SEE ALSO:

[Forecast Sales by Territory \(Generally Available\)](#)

[Share Your Forecasts \(Generally Available\)](#)

Enterprise Territory Management: Forecast Sales by Territory (Generally Available)

Territory Forecasting gives your team a snapshot of how expected opportunity revenue compares between sales territories. Want to know which territory has the most in closed deals this month? Use Territory Forecasting to find out.

Where: This change applies to Lightning Experience in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

SEE ALSO:

[Forecast Sales by Territory \(Generally Available\)](#)

Accounts: Multiple Team Members and Partner Users on Account Teams

Your sales reps can add multiple team members simultaneously, and they can add partner users to account teams.

IN THIS SECTION:

[Add Multiple Account Team Members Faster in Lightning Experience](#)

The days of slowly adding account team members one... by... one are finally over. Now your sales reps can add multiple account team members simultaneously, so they have more time for everything else on their to-do lists. Plus, reps see only the team member fields they're allowed to edit.

[Include Partner Users on Account Teams in Lightning Experience](#)

Now account teams using Lightning Experience can include partner users too, not just internal users.

Add Multiple Account Team Members Faster in Lightning Experience

The days of slowly adding account team members one... by... one are finally over. Now your sales reps can add multiple account team members simultaneously, so they have more time for everything else on their to-do lists. Plus, reps see only the team member fields they're allowed to edit.

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

How: If you've enabled account teams, no additional setup is required to see these updates. When sales reps want to add team members from the Account Team related list on an account, they click **Add Team Members**. Then reps fill in the available fields for all new account team members and click **Save**.

Add Account Team Members

1 Team members can have higher access levels than what's granted to them in this team.

*USER	*TEAM ROLE	*ACCOUNT ACCESS	*CONTACT ACCESS	*CASE ACCESS	*OPPORTUNITY	
1	rosberg	Account Manager	Read/Write	Read Only	Private	Read/Write
2			Read/Write			
3			Read Only			

+ Add 1 more row

Cancel Save

SEE ALSO:

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

Include Partner Users on Account Teams in Lightning Experience

Now account teams using Lightning Experience can include partner users too, not just internal users.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Include Partner Users on Opportunity Teams in Lightning Experience](#)

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

Campaigns: Sync Pardot and Salesforce Campaign Members and Quickly Adjust Filters on Campaign Related Lists

Keep your connected Pardot and Salesforce Campaigns' member lists in sync and easily make temporary changes to Campaigns related list filters.

IN THIS SECTION:

[Campaigns: Keep Pardot and Salesforce Campaign Members in Sync](#)

When your marketing team connects their Pardot and Salesforce campaigns, they don't have to think twice about which system to use to add campaign members. Members that are added to Salesforce campaigns show up on connected records in Pardot, and vice versa.

[Drill Into Your Campaign Related Lists with Quick Filters](#)

Quick filters let you adjust your campaign related list filter set in a breeze. Quick filters are different from regular list view filters in that they aren't saved, persist only throughout your current session, and can't be shared. Use quick filters to easily refine your list view without the commitment.

Campaigns: Keep Pardot and Salesforce Campaign Members in Sync

When your marketing team connects their Pardot and Salesforce campaigns, they don't have to think twice about which system to use to add campaign members. Members that are added to Salesforce campaigns show up on connected records in Pardot, and vice versa.

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

SEE ALSO:

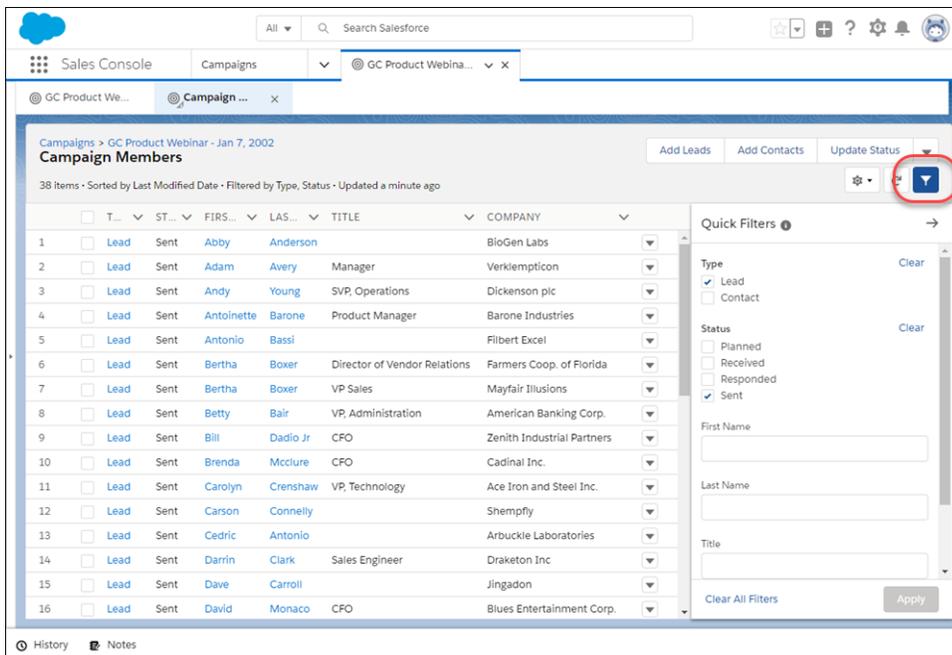
[Create Salesforce Campaign Members from Prospects](#)

Drill Into Your Campaign Related Lists with Quick Filters

Quick filters let you adjust your campaign related list filter set in a breeze. Quick filters are different from regular list view filters in that they aren't saved, persist only throughout your current session, and can't be shared. Use quick filters to easily refine your list view without the commitment.

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

How: In a campaign related list for campaign members and campaign influence, click  to add quick filters.



The screenshot shows the Salesforce interface for a Campaign Members list. The list is titled "Campaign Members" and contains 38 items. The list is sorted by Last Modified Date and filtered by Type and Status. The list columns include checkboxes, Type, Status, First Name, Last Name, Title, and Company. A "Quick Filters" panel is visible on the right side of the list, with a blue funnel icon circled in red. The panel includes filters for Type (Lead, Contact), Status (Planned, Received, Responded, Sent), and search fields for First Name, Last Name, and Title. There are "Clear All Filters" and "Apply" buttons at the bottom of the panel.

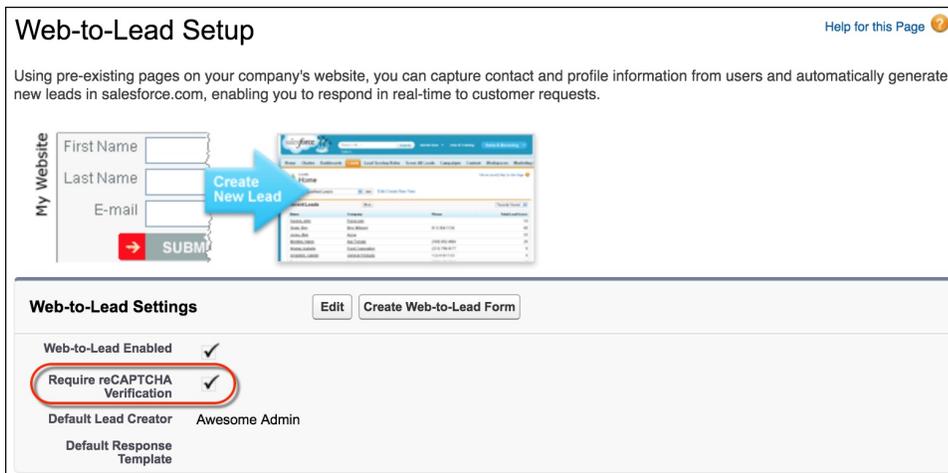
	T...	ST...	FIRS...	LAS...	TITLE	COMPANY	
1	<input type="checkbox"/>	Lead	Sent	Abby	Anderson	BioGen Labs	
2	<input type="checkbox"/>	Lead	Sent	Adam	Avery	Manager	Verkiempton
3	<input type="checkbox"/>	Lead	Sent	Andy	Young	SVP, Operations	Dickenson pic
4	<input type="checkbox"/>	Lead	Sent	Antoinette	Barone	Product Manager	Barone Industries
5	<input type="checkbox"/>	Lead	Sent	Antonio	Bassi		Filbert Excel
6	<input type="checkbox"/>	Lead	Sent	Bertha	Boxer	Director of Vendor Relations	Farmers Coop. of Florida
7	<input type="checkbox"/>	Lead	Sent	Bertha	Boxer	VP Sales	Mayfair Illusions
8	<input type="checkbox"/>	Lead	Sent	Betty	Bair	VP, Administration	American Banking Corp.
9	<input type="checkbox"/>	Lead	Sent	Bill	Dadio Jr	CFO	Zenith Industrial Partners
10	<input type="checkbox"/>	Lead	Sent	Brenda	McClure	CFO	Cadinal Inc.
11	<input type="checkbox"/>	Lead	Sent	Carolyn	Crenshaw	VP, Technology	Ace Iron and Steel Inc.
12	<input type="checkbox"/>	Lead	Sent	Carson	Connelly		Shempfly
13	<input type="checkbox"/>	Lead	Sent	Cedric	Antonio		Arbuckle Laboratories
14	<input type="checkbox"/>	Lead	Sent	Darrin	Clark	Sales Engineer	Draketon Inc
15	<input type="checkbox"/>	Lead	Sent	Dave	Carroll		Jingadon
16	<input type="checkbox"/>	Lead	Sent	David	Monaco	CFO	Blues Entertainment Corp.

Leads: Reject Leads That Don't Use reCAPTCHA

Stop spammers from sending you bogus leads. Reject leads that generate from Web-to-Lead that don't use reCAPTCHA verification.

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

How: In Setup, go to the Web-to-Lead Setup page, and look for the Require reCAPTCHA Verification setting. Enabling this setting turns on the Include reCAPTCHA in HTML setting on the Create a Web-to-Lead Form page. Then make sure that the HTML on your website includes the reCAPTCHA code.



In new orgs, Require reCAPTCHA Verification is enabled by default.

Note: If your org already uses reCAPTCHA, manually enable **Require reCAPTCHA Verification**. After enabling this setting, it's important that you ensure the code on your website includes the reCAPTCHA validation code. You might need to regenerate your HTML code and update it on your website. If your website doesn't include the reCAPTCHA code, customers can't submit leads.

SEE ALSO:

[Salesforce Help: Generate Leads from Your Website for Your Sales Teams \(can be outdated or unavailable during release preview\)](#)

Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams

Sales teams can keep the previous opportunity team together when an opportunity is transferred to a new owner, and they can add partner users to teams.

IN THIS SECTION:

[Retain Edit Rights for Previous Opportunity Owners](#)

You can now choose to keep the previous opportunity team together when an opportunity is transferred to a new owner in Lightning Experience. You can also choose to let the previous owner retain read/write access after the switch.

[Include Partner Users on Opportunity Teams in Lightning Experience](#)

Now opportunity teams using Lightning Experience can include partner users too, not just internal users.

Retain Edit Rights for Previous Opportunity Owners

You can now choose to keep the previous opportunity team together when an opportunity is transferred to a new owner in Lightning Experience. You can also choose to let the previous owner retain read/write access after the switch.

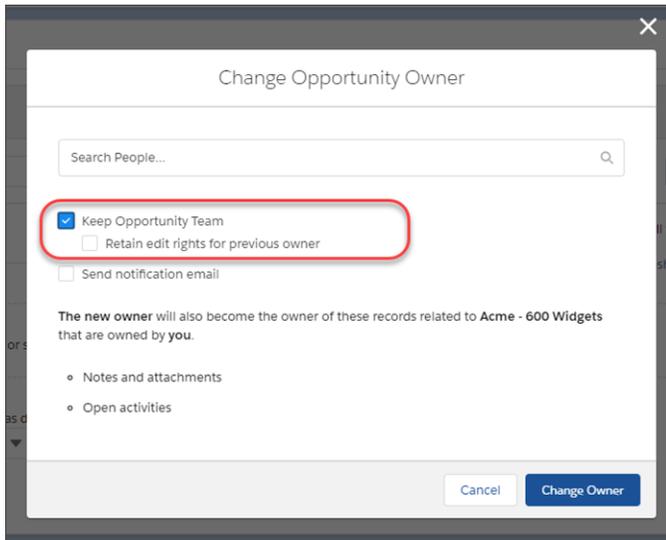
Where: This change applies to Lightning Experience and all versions of the Salesforce app in Essentials, Group, Professional, Enterprise, Unlimited, Performance, and Developer editions.

How:

EDITIONS

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

The **Retain edit rights for previous owner** option becomes available when **Keep Opportunity Team** is selected.



Include Partner Users on Opportunity Teams in Lightning Experience

Now opportunity teams using Lightning Experience can include partner users too, not just internal users.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Include Partner Users on Account Teams in Lightning Experience](#)

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

Other Changes in Core Sales Features

Customizable Forecasting and the original territory management feature are scheduled for retirement as of Summer '20. Install the LinkedIn Sales Navigator AppExchange package from Setup. In Enterprise Territory Management, list your territories' opportunities quickly, and then report on them. And manage your territories more easily in Lightning Experience.

IN THIS SECTION:

[Customizable Forecasting Is Being Retired](#)

Customizable Forecasting is scheduled for retirement in all Salesforce orgs as of Summer '20. After the feature is retired, users can't access the Customizable Forecasting feature and its underlying data. We encourage you to migrate to Collaborative Forecasts. For more information, see [Customizable Forecasting Will Be Retired in the Summer '20 Release](#).

[Territory Management Is Being Retired](#)

The original territory management feature is scheduled for retirement in all Salesforce orgs as of Summer '20. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management. For more information, see [The Original Territory Management Module Will Be Retired in the Summer '20 Release](#).

[Integrate LinkedIn Sales Navigator](#)

Set up LinkedIn Sales Navigator for your sales team faster than ever. With the new LinkedIn Sales Navigator setup page, you can install the package from the LinkedIn Sales Navigator setup page without visiting AppExchange. The new setup pages then step you through the entire process.

[Filter Opportunity List Views by Territory](#)

Enterprise Territory Management users can easily find opportunities assigned to their territories with the My Territories and My Territory Team's filters.

[Filter Opportunity Reports by Territory](#)

Enterprise Territory Management users can easily report on the opportunities assigned to their territories with the My Territories and My Territory Team's filters.

[Trigger Territory Assignment on Account Update in Lightning Experience](#)

Users no longer have to switch to Salesforce Classic to select **Evaluate this account against territory rules on save** on the account edit page. With this checkbox selected, Salesforce runs assignment rules when an account is updated and saved. That way, territory assignments stay up to date.

[Executive News Articles No Longer Available](#)

The News component and News app no longer include articles about executives who work at the company associated with the particular record. We never had much executive news to begin with, so you won't miss much.

Customizable Forecasting Is Being Retired

Customizable Forecasting is scheduled for retirement in all Salesforce orgs as of Summer '20. After the feature is retired, users can't access the Customizable Forecasting feature and its underlying data. We encourage you to migrate to Collaborative Forecasts. For more information, see [Customizable Forecasting Will Be Retired in the Summer '20 Release](#).

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

How: Review our documentation and follow the instructions for setting up Collaborative Forecasts. If you use territory management, we also encourage you to migrate to Enterprise Territory Management.

SEE ALSO:

[Salesforce Help: What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

[Salesforce Help: Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#)

[Trailhead: Optimize Sales Forecasts](#)

[Collaborative Forecasts Implementation Guide](#)

[Salesforce Help: Configure Collaborative Forecasts](#)

[Trailhead: Increase Sales Efficiency with Territory Management](#)

[Enterprise Territory Management Implementation Guide](#)

[Salesforce Help: Enterprise Territory Management](#)

[Territory Management Is Being Retired](#)

Territory Management Is Being Retired

The original territory management feature is scheduled for retirement in all Salesforce orgs as of Summer '20. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management. For more information, see [The Original Territory Management Module Will Be Retired in the Summer '20 Release](#).

Where: This change applies to Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: Review our documentation and follow the instructions for setting up Enterprise Territory Management. If you use forecasting, we also encourage you to migrate to Collaborative Forecasts.

SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

[Enterprise Territory Management Implementation Guide](#)

[Salesforce Help: Enterprise Territory Management](#)

[Salesforce Help: What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

[Salesforce Help: Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#)

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[Salesforce Help: Configure Collaborative Forecasts](#)

[Customizable Forecasting Is Being Retired](#)

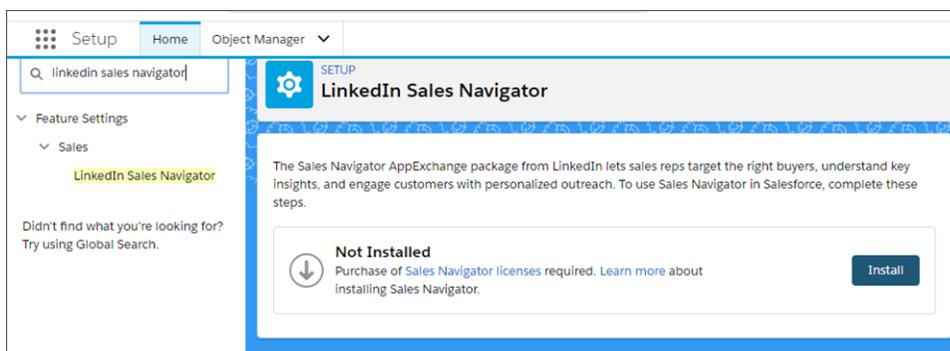
Integrate LinkedIn Sales Navigator

Set up LinkedIn Sales Navigator for your sales team faster than ever. With the new LinkedIn Sales Navigator setup page, you can install the package from the LinkedIn Sales Navigator setup page without visiting AppExchange. The new setup pages then step you through the entire process.

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

Who: Sales Navigator seat licenses are purchased separately through LinkedIn.

How: Install LinkedIn Sales Navigator on the **LinkedIn Sales Navigator** page in Setup.



After installation, complete the steps displayed on the Setup page to connect Salesforce to Sales Navigator, enable My Domain, and customize Lightning record pages to use Sales Navigator.

SETUP
LinkedIn Sales Navigator

The Sales Navigator AppExchange package from LinkedIn lets sales reps target the right buyers, understand key insights, and engage customers with personalized outreach. To use Sales Navigator in Salesforce, complete these steps.

Package Installed
Purchase of [Sales Navigator licenses](#) required. [Learn more](#) about installing Sales Navigator. [Uninstall](#)

Connect Salesforce to Sales Navigator [Go to Sales Navigator](#)
Adjust [CRM Sync Settings](#) to import accounts, leads, and contacts associated with open opportunities into LinkedIn, and to save information from Sales Navigator to Salesforce.

Confirm That My Domain Is Enabled [My Domain Settings](#)
Sales Navigator requires you to have My Domain enabled. [Learn about My Domain.](#)

Let Users Access Sales Navigator [View Lightning Pages](#)
Installing Sales Navigator for the first time? Use the Lightning App Builder to add Sales Navigator components to Lightning record pages for [accounts](#), [contacts](#), [leads](#), and [opportunities](#).
If you've never customized record pages, don't sweat it! Check out the new "Sales Navigator" sample pages in your Lightning record pages. Use the sample pages for inspiration, or customize and activate the sample pages to use them.

i If you're updating from an older version of Sales Navigator installed before Winter '19, remove the Sales Navigator component from record page layouts using [Lightning App Builder](#). Then, add and customize your new flexible components.

Filter Opportunity List Views by Territory

Enterprise Territory Management users can easily find opportunities assigned to their territories with the My Territories and My Territory Team's filters.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

How:

Filter by Owner

All opportunities

My opportunities

My territories' opportunities

My territory team's opportunities

[Done](#)

Filters →

Filter by Owner
My opportunities

[Add Filter](#) [Remove All](#)

When you create an opportunity list view, select a territory filter.

SEE ALSO:

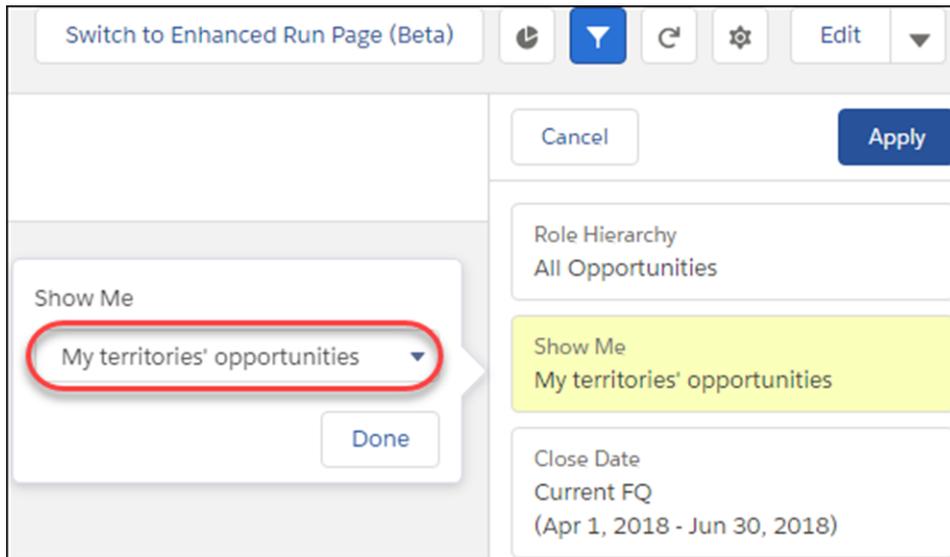
[Find Your Territories' Opportunities on the Go](#)

Filter Opportunity Reports by Territory

Enterprise Territory Management users can easily report on the opportunities assigned to their territories with the My Territories and My Territory Team's filters.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

How:



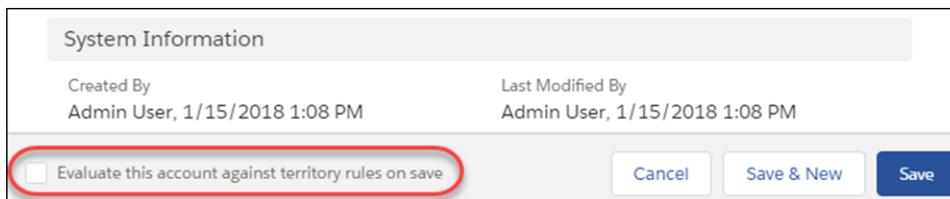
When you create or run an opportunity report, select a territory filter.

Trigger Territory Assignment on Account Update in Lightning Experience

Users no longer have to switch to Salesforce Classic to select **Evaluate this account against territory rules on save** on the account edit page. With this checkbox selected, Salesforce runs assignment rules when an account is updated and saved. That way, territory assignments stay up to date.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

How:



If you've added the checkbox to your account layout properties, it's available when users edit an account in Lightning Experience.

SEE ALSO:

[Manage Territory Account Assignment on the Go](#)

Executive News Articles No Longer Available

The News component and News app no longer include articles about executives who work at the company associated with the particular record. We never had much executive news to begin with, so you won't miss much.

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

SEE ALSO:

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

Productivity Features: Bounced Email Address Alerts, Email Tracking Options, and Call Recording

See a bounce warning when an email doesn't go through due to a bad email address. Know if emails are being opened, and when. Record calls with Lightning Dialer for training and quality control.

IN THIS SECTION:

[Inbox: Get More Relevant Suggestions with Custom Einstein Email Insights](#)

Give your sales reps the most relevant email insights by telling Einstein what to look for in email content.

[Email Experience: Attachments in List Emails and Actions, Bounce Notifications, Email Tracking, and Quick Text](#)

Use attachments in list emails to groups, or add attachments to email actions. Know when emails don't go through, and use tracking to see how emails impact customers. Save time writing emails with quick text, and enjoy improved email security.

[Email Templates: Privacy and Merge Field Improvements, Attachments on Templates, Better Experience Using Classic Templates](#)

Keep email templates private until you're ready to make them public. See only relevant merge fields, and use a single merge field for contacts and leads. Add attachments to templates.

[Lightning Dialer: Recording and Call Bridge](#)

Dialer now supports call recording. Sales reps can also use the Call Bridge feature to make Dialer calls with their desk or mobile phone.

[Einstein Activity Capture: Einstein Email Insights Improvements and Recommended Connections](#)

Customize email insights to fit your business. Sales reps can take action from insights and leave feedback there. Plus, find new business by seeing which colleagues are connected to a prospect.

[Activities: Task Reminders in Quick Actions, Quick Text, and Improved Filters on the Activity Timeline](#)

Include reminders when you set up task quick actions. Quick text is available for events and tasks. The activity timeline is improved with persistent filters and more control over which activity types appear. See email bounce notifications and email tracking on the activity timeline.

[Kanban: Recently Viewed Availability, Search Kanban View](#)

Explore the power of the Kanban View from Recently Viewed lists. No need to switch to another view to find records. Search is now available on the Kanban View.

[Calendar: Event Series and More Task Filters](#)

Sales reps can schedule recurring events from Lightning Experience and the Salesforce app. Plus, reps have more filters to customize which tasks they see on their calendars. And they can make changes to event participants from any user interface.

[Sales Console: Customized Navigation Items and Improvements to Macros and Quick Text](#)

We're rolling out a slew of features to make your reps more productive in Sales Console. Reps can personalize their navigation item menu and also organize macros and quick text into logical groups. Reps using a Salesforce Classic console app have a faster way to switch to Lightning Experience—just look for a link in the user profile menu.

Inbox: Get More Relevant Suggestions with Custom Einstein Email Insights

Give your sales reps the most relevant email insights by telling Einstein what to look for in email content.

Where: This feature is new in Salesforce Inbox mobile app, which is available for an extra cost in Essentials, Professional, Enterprise, Performance, and Unlimited Editions. Custom Einstein Email Insights isn't available for Einstein Activity Capture Standard users.

SEE ALSO:

[Customize Einstein Email Insights to Fit Your Business](#)

Email Experience: Attachments in List Emails and Actions, Bounce Notifications, Email Tracking, and Quick Text

Use attachments in list emails to groups, or add attachments to email actions. Know when emails don't go through, and use tracking to see how emails impact customers. Save time writing emails with quick text, and enjoy improved email security.

IN THIS SECTION:

[Bounce Back from Email Bounces](#)

Sales reps need to know when their emails to contacts, leads, and person accounts don't go through. Without a warning, they're waiting for a response that'll never come. Now reps know which lead, contact, or person account has a bad email address, and they know which specific email wasn't delivered.

[Quickly See Whether Customers Open Email from Your Company](#)

Glance at the activity timeline to see if and when customers open regular email that reps send through Salesforce.

[Turn Off Email Tracking for Specific People](#)

Honor customer requests to not track if and when they open both regular and list email that reps send through Salesforce.

[Add Attachments to List Emails](#)

Attachments can be a key part of your company's email marketing strategy. Use attachments in list emails to groups of people.

[Save Sales Reps Time with Quick Text for Emails and List Emails](#)

Do your sales reps have a lot of similar content in their emails? Then we've got good news. Reps can use the quick text button in the email and list email toolbar to enter common descriptions such as "Reach me in the following ways: email and mobile phone" instead of typing out the same message over and over.

[Improve Email Security with Redesigned DKIM Keys](#)

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to mess around with public and private keys. Instead, Salesforce publishes the TXT record containing your public key to DNS. We also added automatic key rotation to reduce the risk of your keys becoming compromised by a third party. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys.

[Secure Email Relays with SMTP Authentication](#)

When you set up an email relay, you can enable SMTP authentication between Salesforce mail servers and your email relay host.

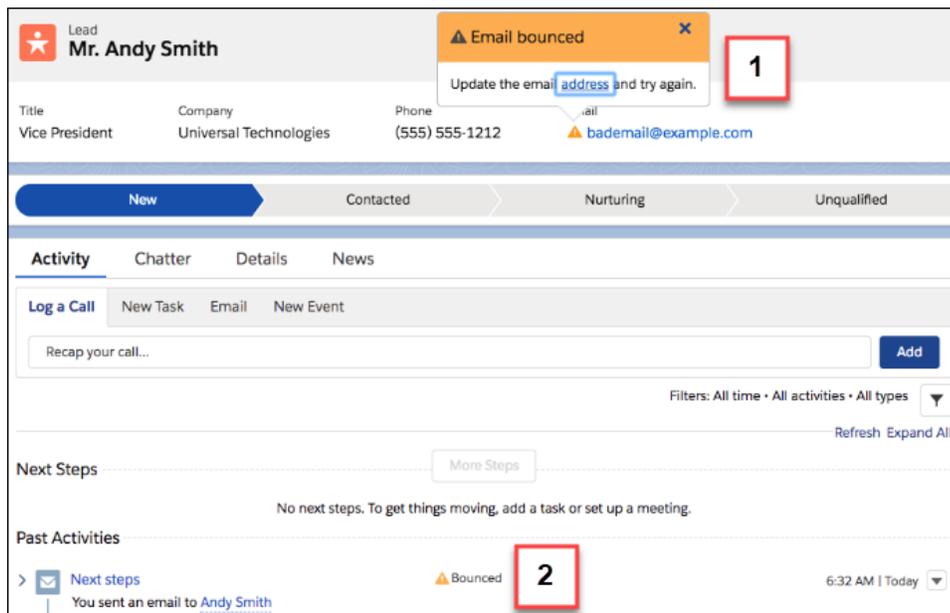
Bounce Back from Email Bounces

Sales reps need to know when their emails to contacts, leads, and person accounts don't go through. Without a warning, they're waiting for a response that'll never come. Now reps know which lead, contact, or person account has a bad email address, and they know which specific email wasn't delivered.

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

Who: Any user can see a bounce warning. If the user has update rights to the record, the user can update the contact's email address to remove the bounce warning.

Why: A bounce warning appears next to the email address in lead, contact, and person account record (1).



Reps can also see the bounce warning in the activity timeline (2).

 **Note:** The activity timeline doesn't show the bounce warning for list emails.

When reps click the warning next to the email address, they are taken to the appropriate detail page to update the email address.

How: To activate Bounce Management, from Setup, click **Email**, then click **Deliverability**. Select **Activate bounce management**.

To display bounce information, from Setup, enter *Enhanced Email* in the Quick Find box, and then select **Enhanced Email**. Click **Enable**.

SEE ALSO:

[See Email Tracking and Bounce Information in the Activity Timeline](#)

[Salesforce Help: Use Enhanced Email for More Email Functionality \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enable Email Bounce Handling \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Mark Bounced Email Activities as Bounced](#)

Quickly See Whether Customers Open Email from Your Company

Glance at the activity timeline to see if and when customers open regular email that reps send through Salesforce.

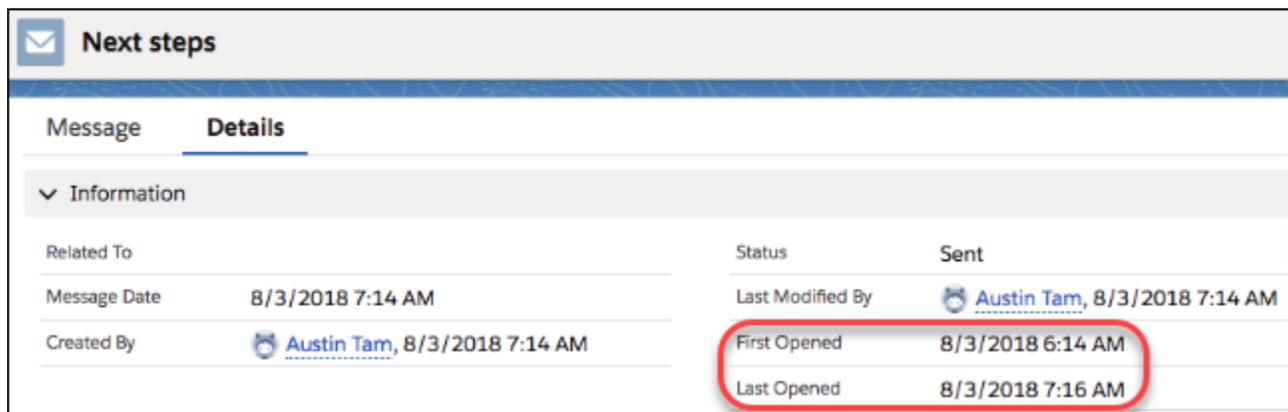
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Previously, to see if and when customers opened email from your company, reps ran the HTML Email Status report. But now, tracking information is visible in the activity timeline.



Reps can see if and when customers open email from your company.

If you want, add the *First Opened* and *Last Opened* fields to your email page layouts to see the information there, too.



To collect and display email tracking information, you must enable Enhanced Email and Email Tracking.

Note: In Lightning Experience, email tracking applies to all regular emails sent through Salesforce, Office 365, Gmail, and Email Relay.

Email tracking doesn't apply to emails sent from Cases or emails that use Email-to-Case. It also doesn't apply to emails sent by users using Einstein Activity Capture in Lightning Experience.

List emails show tracking information in the HTML Status Report only.

If email tracking was enabled before the Winter '19 release, emails sent before Winter '19 don't show the correct tracking information in Lightning Experience. The activity timeline and the email record home show **Not Tracked** for these emails. The correct tracking information is available in the HTML Status report.

SEE ALSO:

[Turn Off Email Tracking for Specific People](#)

[See Email Tracking and Bounce Information in the Activity Timeline](#)

[Salesforce Help: Store Customers' Data Privacy Preferences \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Email Open Tracking \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Enhanced Email \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: View HTML Email Status in Opportunities and Accounts](#)

[IdeaExchange: HTML Email Status in Lightning](#)

Turn Off Email Tracking for Specific People

Honor customer requests to not track if and when they open both regular and list email that reps send through Salesforce.

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

How: To record customer requests to not track if and when they open email from your company, enable Enhanced Email and Enable Email Tracking, if necessary, and then enable Data Protection and Privacy.

From Setup, enter *Data Protection and Privacy* in the Quick Find box, and then select **Make data protection details available in records**.

Complete all the steps detailed in *Salesforce Help* to fully set up data protection and privacy.

 **Note:** With data protection and privacy enabled, email tracking for emails sent from Salesforce requires an Individual record for every recipient, such as contacts, lead, person accounts, and users.

We respect the **Don't Process** and **Don't Track** preferences.

SEE ALSO:

[Salesforce Help: Data Protection and Privacy \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Store Customers' Data Privacy Preferences \(can be outdated or unavailable during release preview\)](#)

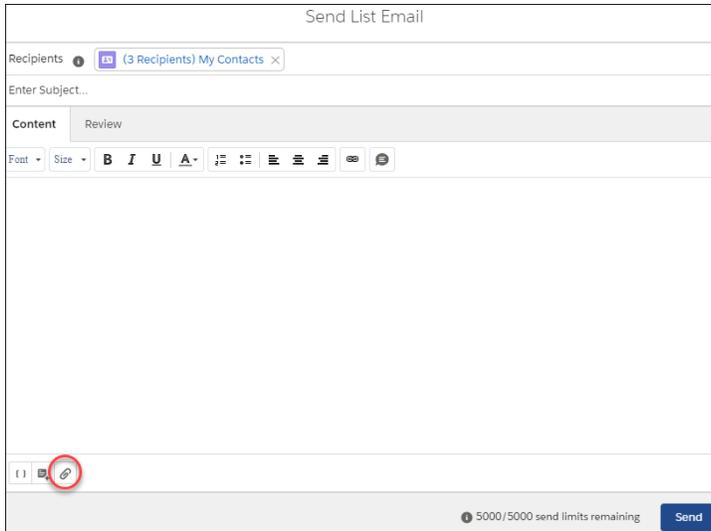
[Salesforce Help: Respect Privacy Preferences for Email Tracking \(can be outdated or unavailable during release preview\)](#)

Add Attachments to List Emails

Attachments can be a key part of your company's email marketing strategy. Use attachments in list emails to groups of people.

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

How: Add an attachment when you're composing the list email.



SEE ALSO:

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

Save Sales Reps Time with Quick Text for Emails and List Emails

Do your sales reps have a lot of similar content in their emails? Then we've got good news. Reps can use the quick text button in the email and list email toolbar to enter common descriptions such as "Reach me in the following ways: email and mobile phone" instead of typing out the same message over and over.

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

SEE ALSO:

[Click Away—Insert Quick Text into Your Emails with a Button](#)

[Salesforce Help: Set Up and Use Quick Text \(can be outdated or unavailable during release preview\)](#)

Improve Email Security with Redesigned DKIM Keys

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to mess around with public and private keys. Instead, Salesforce publishes the TXT record containing your public key to DNS. We also added automatic key rotation to reduce the risk of your keys becoming compromised by a third party. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys.

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

How: Enable this critical update to improve security and make it easier to create and maintain DKIM keys. From Setup, enter *Critical Updates* in the Quick Find box. Then select **Critical Updates**. For Enable Redesigned DomainKeys Identified Mail (DKIM) Key Feature with Increased Email Security, click **Activate**.

SEE ALSO:

[Salesforce Help: Setting Up More Secure DKIM Keys \(can be outdated or unavailable during release preview\)](#)

Secure Email Relays with SMTP Authentication

When you set up an email relay, you can enable SMTP authentication between Salesforce mail servers and your email relay host.

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

How: In Email Relays in Setup, create an email relay, and enable the SMTP authentication setting.

Before enabling SMTP authentication, test this feature in a sandbox org to ensure that it works as expected with your email relay. Some email services don't support SMTP authentication for email relays.

Email Templates: Privacy and Merge Field Improvements, Attachments on Templates, Better Experience Using Classic Templates

Keep email templates private until you're ready to make them public. See only relevant merge fields, and use a single merge field for contacts and leads. Add attachments to templates.

IN THIS SECTION:

[Let Sales Reps Manage Email Template Privacy](#)

Sales reps can now keep email templates private until they're ready to make them public. Previously, all Lightning email templates were public.

[Email Templates Show Only Relevant Merge Fields](#)

When creating email templates, who wants to see merge fields they can't use? Now your users don't have to.

[Focus on Leads and Contacts in the Merge Field Picker](#)

When sales reps specify a merge field for an email recipient, the merge field now shows the corresponding field only for contacts and leads. There's no need to create separate templates for contacts and leads.

[Manage Salesforce Classic Email Templates a New Way in Lightning Experience](#)

Although your sales reps can easily access Salesforce Classic email templates while composing an email or list email, the Email Templates home displays only Lightning email templates. If reps use a saved or bookmarked URL to access a Salesforce Classic email template, we remind them to preview and edit the template using Classic Email Templates in Setup.

[Use Attachments After Inserting Salesforce Classic Email Templates](#)

Your sales reps know that they can insert a Salesforce Classic email template into a Lightning Experience email. Now they can use existing content and add attachments to the email too. For text, custom HTML, and letterhead email templates, reps can add attachments from Files.

[Add Attachments to Lightning Email Templates](#)

Your company's marketing collateral can now be part of your email templates. By adding attachments to email templates, sales reps don't have to worry about remembering to include that key brochure when emailing customers. Plus, you can make sure that attachments always include the latest content.

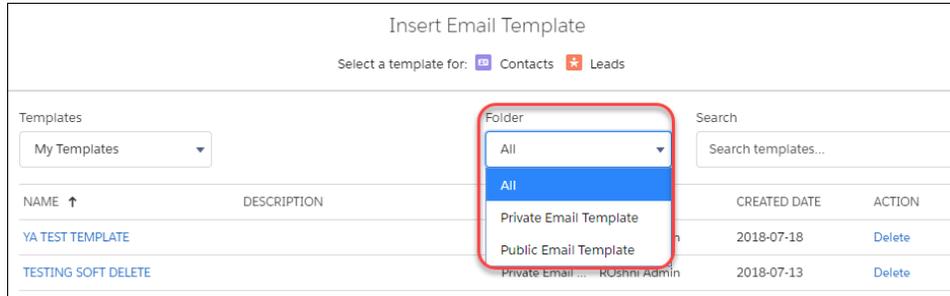
Let Sales Reps Manage Email Template Privacy

Sales reps can now keep email templates private until they're ready to make them public. Previously, all Lightning email templates were public.

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

Who: Users with the Manage Public Lightning Email Templates user permission can create public email templates. Users without the permission can create only private email templates.

How: All users can edit their own private email templates and any public email templates that they own. When reps open, insert, or save email templates, they can choose a public or private folder.



To allow users to create public email templates, give them the Manage Public Lightning Email Templates user permission. From Setup, enter *Permission Sets* in the Quick Find box. Then, select **Permission Sets**, click one of the standard permission sets, and click **System Permissions**. Click **Edit**, select **Manage Public Lightning Email Templates**, and click **Save**.

If admins and users with the Modify All Data permission have a URL for a private email template, they can read, edit, clone, and delete email templates in other users' private folders. When saving a copy of the private email template, it saves to the admin's private folder.

SEE ALSO:

[Salesforce Help: Manage Public and Private Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Select Who Can Manage Public Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Email Templates Show Only Relevant Merge Fields

When creating email templates, who wants to see merge fields they can't use? Now your users don't have to.

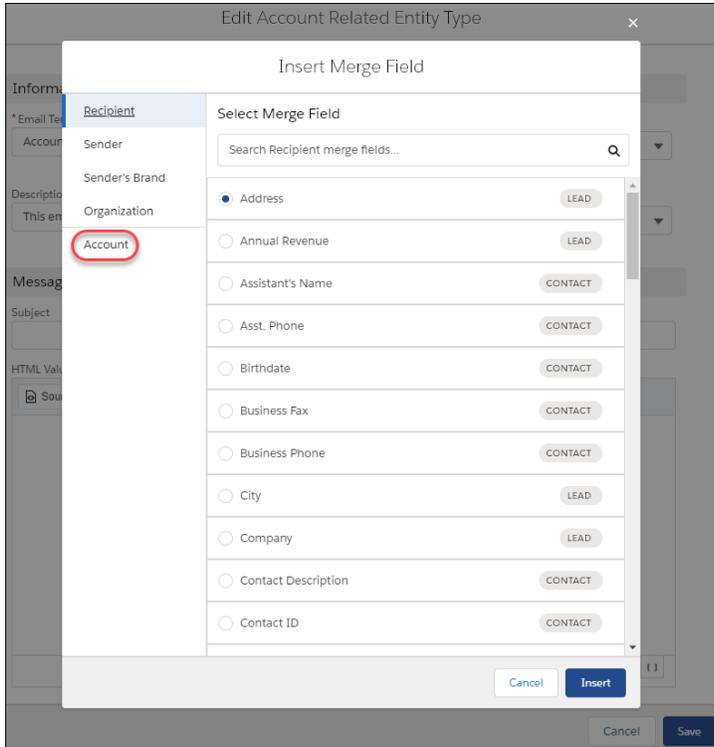
Where: This change applies to Lightning Experience in Personal, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When creating or editing an email template, choose a Related Entity Type.

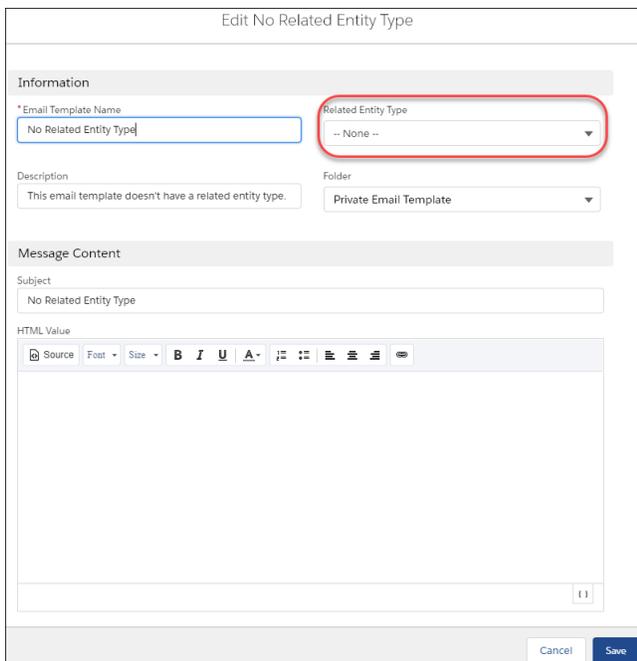
The screenshot shows the 'New Email Template' interface. It has two main sections: 'Information' and 'Message Content'. In the 'Information' section, there is a text field for 'Email Template Name' and a dropdown for 'Related Entity Type'. The dropdown is currently set to '-- None --' and is open, displaying a list of entity types: Contact, Lead, Account, Asset, Asset Relationship, Campaign, Care Preauth, Care Preauth Item, Case, and Channel Program. A red circle highlights the dropdown menu. The 'Message Content' section includes a 'Subject' field and an 'HTML Value' editor with a rich text toolbar.

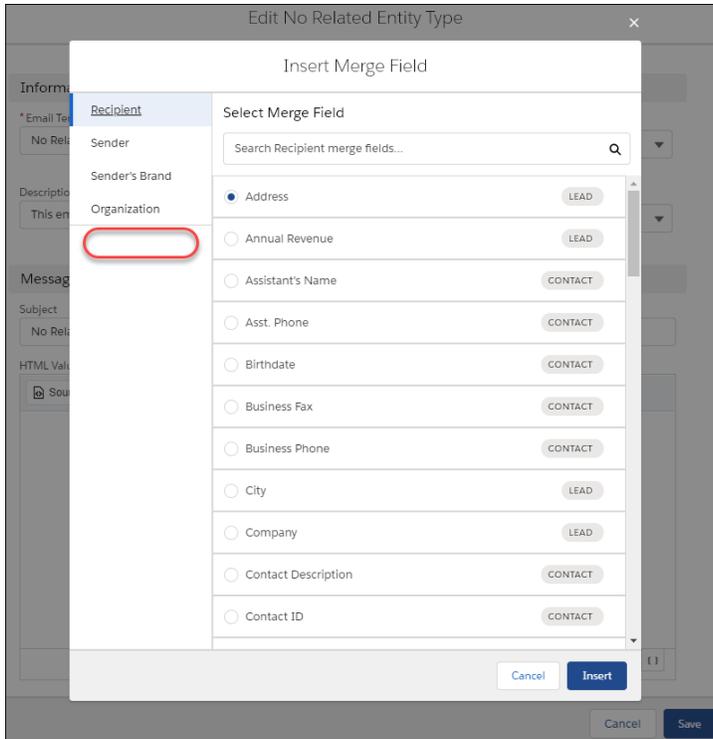
When you choose a Related Entity Type, those entity's merge fields appear in the email template composer.

The screenshot shows the 'Edit Account Related Entity Type' interface. It has two main sections: 'Information' and 'Message Content'. In the 'Information' section, there is a text field for 'Email Template Name' containing 'Account Related Entity Type' and a dropdown for 'Related Entity Type' set to 'Account'. A red circle highlights the dropdown. There is also a 'Description' field with the text 'This email template has an Account entity type.' and a 'Folder' dropdown set to 'Private Email Template'. The 'Message Content' section includes a 'Subject' field and an 'HTML Value' editor with a rich text toolbar. At the bottom, there are 'Cancel' and 'Save' buttons.



Without a related entity type, no additional merge fields appear in the email template composer.





SEE ALSO:

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

Focus on Leads and Contacts in the Merge Field Picker

When sales reps specify a merge field for an email recipient, the merge field now shows the corresponding field only for contacts and leads. There's no need to create separate templates for contacts and leads.

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

SEE ALSO:

[Salesforce Help: Use Merge Fields in Email Templates \(can be outdated or unavailable during release preview\)](#)

Manage Salesforce Classic Email Templates a New Way in Lightning Experience

Although your sales reps can easily access Salesforce Classic email templates while composing an email or list email, the Email Templates home displays only Lightning email templates. If reps use a saved or bookmarked URL to access a Salesforce Classic email template, we remind them to preview and edit the template using Classic Email Templates in Setup.

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

SEE ALSO:

[Salesforce Help: Use Your Classic Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

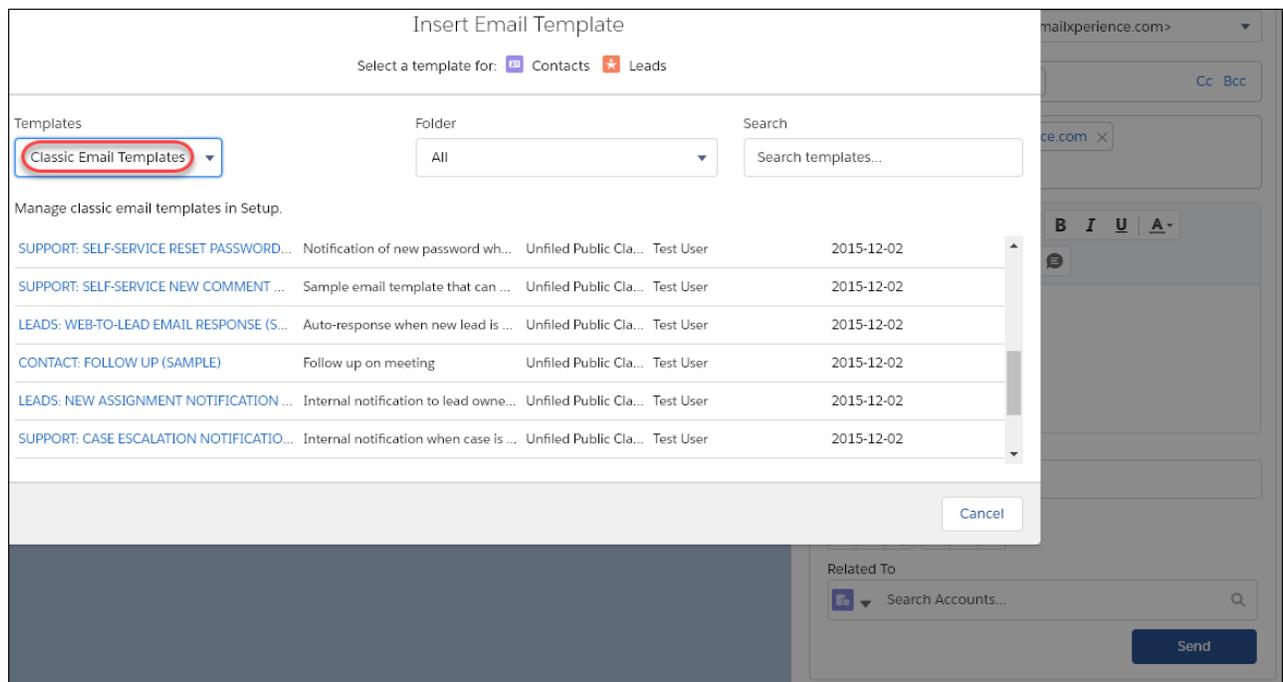
Use Attachments After Inserting Salesforce Classic Email Templates

Your sales reps know that they can insert a Salesforce Classic email template into a Lightning Experience email. Now they can use existing content and add attachments to the email too. For text, custom HTML, and letterhead email templates, reps can add attachments from Files.

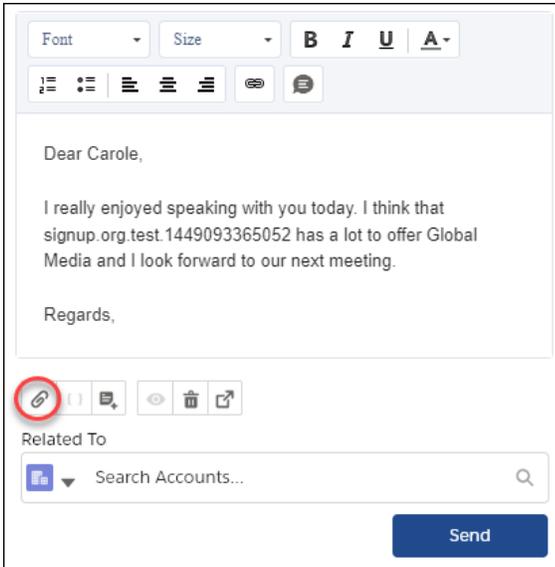
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** When a Salesforce Classic Visualforce email template is inserted into a Lightning Experience email, you can't add an attachment.

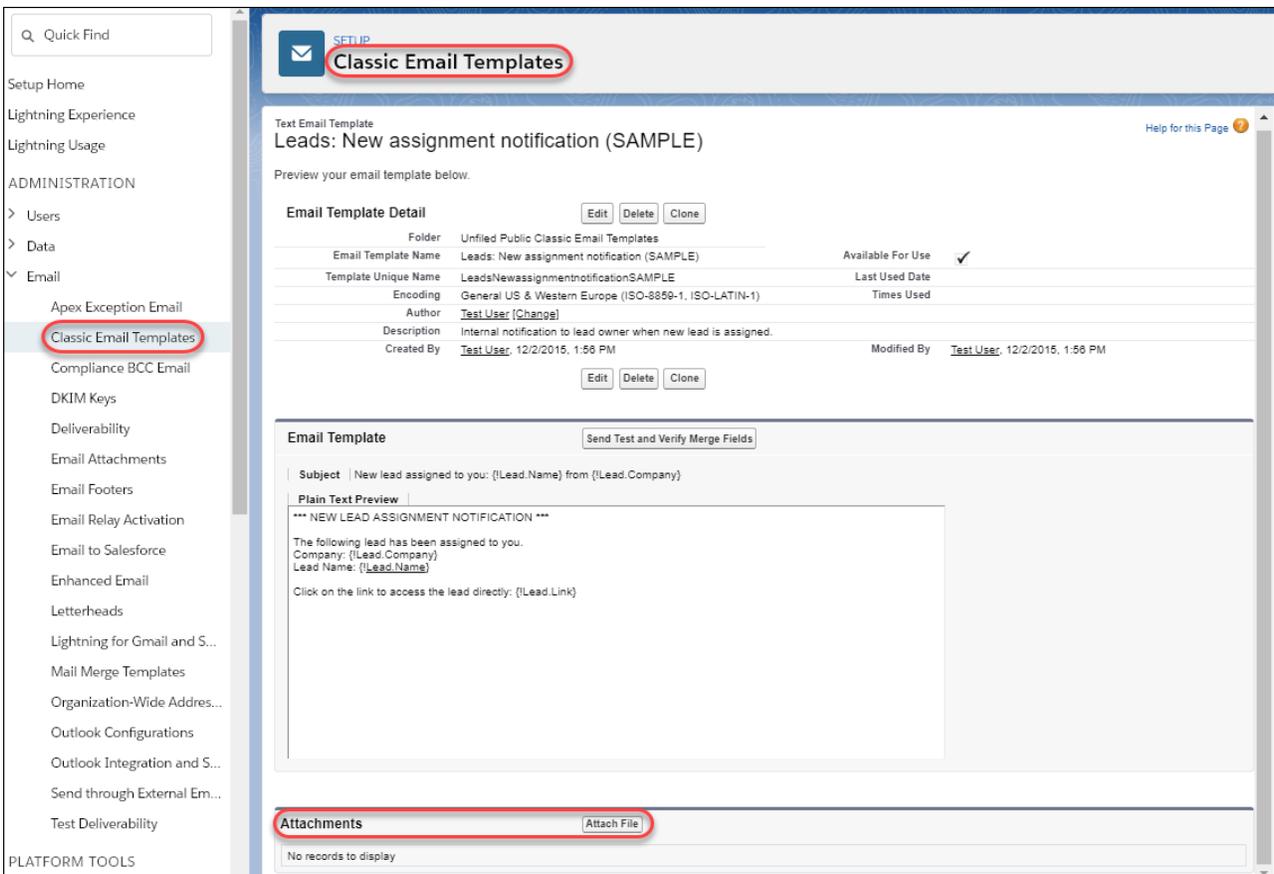
How: Insert a Salesforce Classic email template.



Reps can add an attachment to the email.



To change the attachments that are part of a Salesforce Classic email template, go to Classic Email Templates in Setup.



SEE ALSO:

[Use Visualforce Email Templates in Lightning Experience](#)

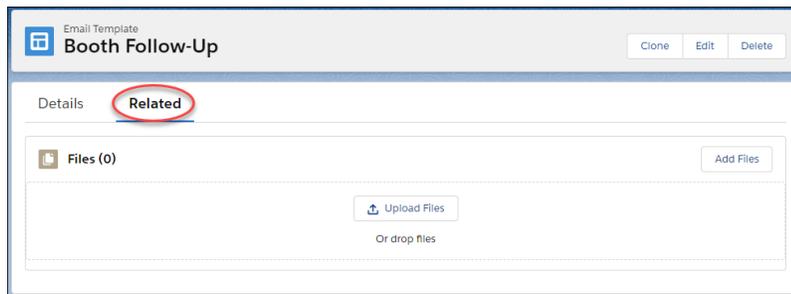
[Salesforce Help: Use Your Classic Email Templates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Add Attachments to Lightning Email Templates

Your company's marketing collateral can now be part of your email templates. By adding attachments to email templates, sales reps don't have to worry about remembering to include that key brochure when emailing customers. Plus, you can make sure that attachments always include the latest content.

Where: This change applies to email templates created in Lightning Experience in Personal, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When editing an email template, click the **Related** tab, and upload the file.



SEE ALSO:

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

Lightning Dialer: Recording and Call Bridge

Dialer now supports call recording. Sales reps can also use the Call Bridge feature to make Dialer calls with their desk or mobile phone.

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

IN THIS SECTION:

[Record Your Dialer Calls](#)

Need to refer to a call later? Sales reps can now record the calls they make with Lightning Dialer. Reps can use call recording to refer back to important conversations or improve their selling techniques.

[Make Dialer Calls with Your Business Phone](#)

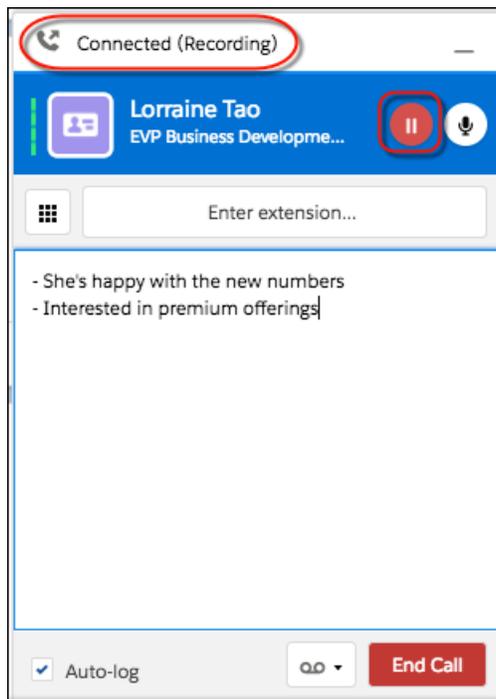
Your reps can make Lightning Dialer calls with their desk or mobile phone. Use the Call Bridge feature to get all the perks of using Lightning Dialer with the convenience of using a separate business line. Using a separate business line is especially useful for reps using Lightning Dialer in areas with a weak internet connection. If the call bridge is enabled, incoming calls to the rep's Dialer number are also directed to the specified phone number if they have an inbound license.

Record Your Dialer Calls

Need to refer to a call later? Sales reps can now record the calls they make with Lightning Dialer. Reps can use call recording to refer back to important conversations or improve their selling techniques.

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

Why: Record important calls directly from the call panel. It's easy to start and pause recordings, and the top of the call panel indicates whether a call is being recorded.



Reps can choose to record calls by default from the Recording Settings page in their personal settings.

Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the **Recording Management** page in Setup.

If required by law, users must notify the call recipient of call monitoring and stop monitoring on request of the call recipient.

How: To enable Call Recording, from Setup, enter *Dialer Settings* in the Quick Find box, and then select **Dialer Settings**.

Make Dialer Calls with Your Business Phone

Your reps can make Lightning Dialer calls with their desk or mobile phone. Use the Call Bridge feature to get all the perks of using Lightning Dialer with the convenience of using a separate business line. Using a separate business line is especially useful for reps using Lightning Dialer in areas with a weak internet connection. If the call bridge is enabled, incoming calls to the rep's Dialer number are also directed to the specified phone number if they have an inbound license.

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

Why: Reps still get all the benefits of using Lightning Dialer, including displaying the rep's Lightning Dialer (or local presence) number. Reps can record calls, leave prerecorded voicemail messages, or have a manager listen in on the call. However, managers can't use a call bridge to monitor calls.

Sales reps can specify a separate phone number from Dialer Settings in their personal settings.

Call Bridge Settings

Make outbound calls through my phone

Using the outbound bridge consumes double the minutes of a regular call. One line connects to your phone, and another connects to the recipient. Incoming calls to your dialer number will be forwarded to this number.

Phone number for bridge ⓘ

 **Note:** Using this feature consumes double the minutes of a typical call. One line connects your Dialer number to your phone, and another to the recipient, thus “bridging” the calls together.

How: To allow call bridge access, from Setup, enter *Dialer Settings* in the Quick Find box, and then select **Dialer Settings**.

Einstein Activity Capture: Einstein Email Insights Improvements and Recommended Connections

Customize email insights to fit your business. Sales reps can take action from insights and leave feedback there. Plus, find new business by seeing which colleagues are connected to a prospect.

IN THIS SECTION:

[Customize Einstein Email Insights to Fit Your Business](#)

Get your sales reps the most relevant email insights by telling Einstein what to look for in email content. By identifying words that are specific to your industry, your reps get insights with the biggest impact.

[Act on Einstein Email Insights](#)

Email insights now include suggested actions to help sales reps move their deals forward.

[Leave Feedback About Einstein Email Insights](#)

Make email insights more accurate by leaving feedback about the relevance of individual insights.

[Reach Out to the Right People with Recommended Connections](#)

Let Einstein help sales reps find new business by showing important connections within their network. Then, reps can email or view colleagues’ profiles who have contacted the contact or lead to ask for advice or an introduction.

Customize Einstein Email Insights to Fit Your Business

Get your sales reps the most relevant email insights by telling Einstein what to look for in email content. By identifying words that are specific to your industry, your reps get insights with the biggest impact.

Where: This feature is new in Lightning Experience in Enterprise, Performance, and Unlimited editions. This feature is new in the Salesforce Inbox mobile app, which is available for an extra cost in Essentials, Professional, Enterprise, Performance, and Unlimited Editions. Custom Einstein Email Insights aren’t available for Einstein Activity Capture Standard users.

Who: To create custom email insights, users need the Customize Application permission.

Why: For example, if you’re in the automotive industry, you can customize an email insight to look for words like *car*, *auto*, *drive*, and *race* in emails. Create and activate up to 10 insights.

New Custom Einstein Insight

Custom Insight Details

* Insight Label

* Insight Description

Keywords

Keyword 1 Keyword 2

Keyword 3 Keyword 4

Keyword 5 Keyword 6

Keyword 7 Keyword 8

Keyword 9 Keyword 10

Match case when searching keywords.

Status

Process and display the email insight. On/Off Enabled

Guidance/Tips

- Carefully chosen keywords provide actionable insights!
- Einstein creates insights by detecting unique words and phrases. So avoid common words such as *and*, *or*, and *the*. Instead, add keywords like *home loan* or *mortgage* to trigger insights about customers interested in buying a home.
- Insights are based on an exact match of your keywords. For example, the keyword *mortgages* doesn't trigger an insight for an email containing *mortgage*. Use the shortest possible version of a word or phrase to increase its chances of being detected.
- To trigger an insight, Einstein needs to find at least one keyword in the targeted content.
- For example, imagine that you work for a transportation company that wants to expand market share for existing products. Some keywords could be:
 1. auto
 2. car
 3. taxi
 4. taxi-cab
 5. bus
- Insights respect your activity sharing settings. You can't see an activity using insights that you wouldn't normally be able to see.
- You can have up to 10 active custom insights.
- You can have up to 1,000 custom insights, including inactive insights. When insights have words that are too broad to use for efficient searches, we inactivate them.

Cancel Save

The custom email insights appear in the activity timeline and email detail page, just like standard email insights. For users of Inbox mobile app, custom email insights appear in their inbox.



Note: Custom email insights don't apply to person accounts.

How: From Setup, in the Quick Find box, enter *Einstein Email Insights*, and then select **Einstein Email Insights**. Click **New**.

SEE ALSO:

[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

Act on Einstein Email Insights

Email insights now include suggested actions to help sales reps move their deals forward.

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

Why: When a rep gets an insight for an email (1), the rep can act directly from the expanded insight (2).

For example, a rep creates an event from the Scheduling Requested insight. The event details include information from the email. All reps have left to do is choose a date and time, add a subject, and save the event.

The available actions depend on the type of insight.

SEE ALSO:

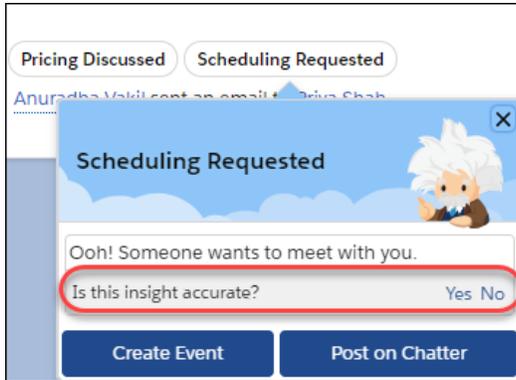
[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

Leave Feedback About Einstein Email Insights

Make email insights more accurate by leaving feedback about the relevance of individual insights.

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

How: Click an insight to expand it. Then tell Salesforce whether the insight was accurate. The information is used by our machine-learning models to improve future insights.



SEE ALSO:

[Salesforce Help: Turn On Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

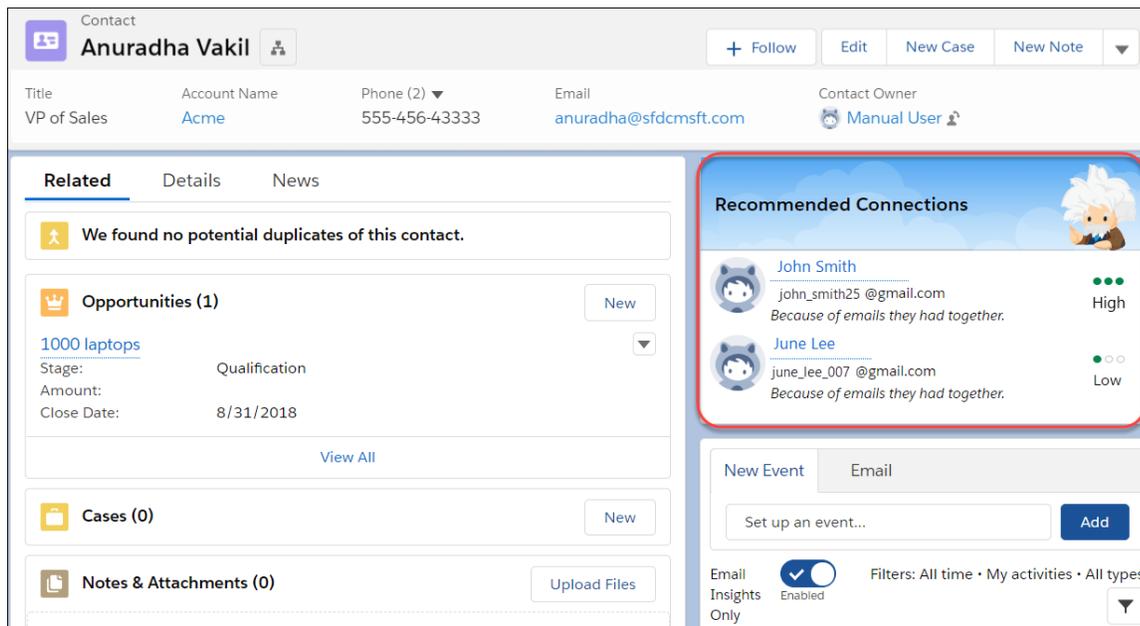
Reach Out to the Right People with Recommended Connections

Let Einstein help sales reps find new business by showing important connections within their network. Then, reps can email or view colleagues' profiles who have contacted the contact or lead to ask for advice or an introduction.

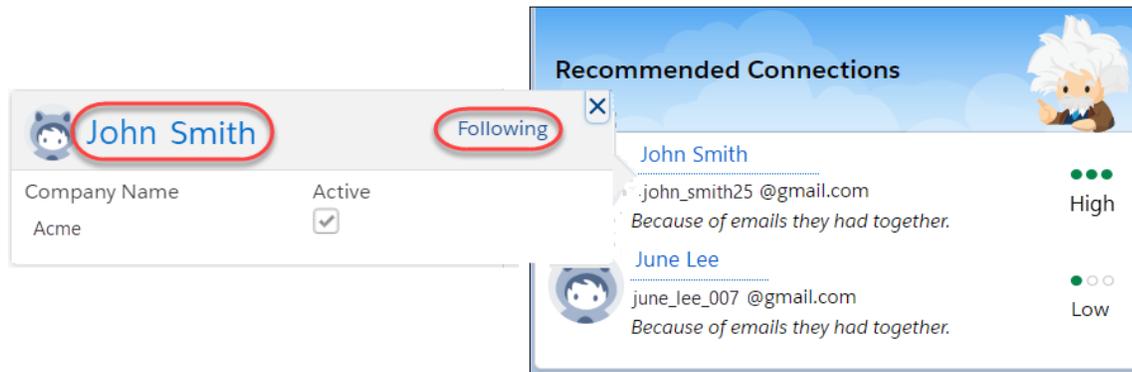
Where: This change applies to Lightning Experience in Enterprise edition.

Who: This feature is available to users with a Sales Cloud Einstein license or an Inbox license.

Why: In Recommended Connections, sales reps see which colleagues have the strongest connection to the contact or lead. A connection might be strong because there's been a lot of emails or meetings between the colleague and that person.



Click the name of the connection to view a detail card. From there, you can navigate to the colleague's profile or follow the person.



How: Using the Lightning App Builder, add the Recommended Connections Lightning component to contact and lead Lightning pages.

SEE ALSO:

[Salesforce Help: Create Custom Einstein Email Insights \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages \(can be outdated or unavailable during release preview\)](#)

Activities: Task Reminders in Quick Actions, Quick Text, and Improved Filters on the Activity Timeline

Include reminders when you set up task quick actions. Quick text is available for events and tasks. The activity timeline is improved with persistent filters and more control over which activity types appear. See email bounce notifications and email tracking on the activity timeline.

IN THIS SECTION:

[Include Reminders with Task Quick Actions](#)

It's easy to make sure that sales reps never forget. When you set up task quick actions, you can include reminders. Previously, users had to create a task and then edit it to set a reminder. Now, when you create a task with the quick action, the action automatically creates a reminder.

[Save Sales Reps Time with Quick Text for Events and Tasks](#)

Do your sales reps have many similar tasks or events? Then we've got good news. Quick text now supports tasks and events. You can use quick text to enter common descriptions like "Confirm date and time for meeting location" instead of typing out the same content over and over.

[Save Time with Persistent Activity Timeline Filters](#)

Sales reps can save their preferred filter settings in the activity timeline.

[Choose Which Activity Types Appear in the Activity Timeline](#)

Sales reps can reduce the noise and focus on the activity types that they want to see in the activity timeline.

[See Email Tracking and Bounce Information in the Activity Timeline](#)

Your users want to know the impact their emails are having. They can see bounce and email tracking information with a glance in the activity timeline. Each email activity shows whether the email was opened and when, or if the email isn't being tracked.

[Filter by Task Subject in Global Search Results](#)

Reps can whittle down search results to find tasks with a certain subject. If you use predefined subjects, you can filter for those subjects to make grouping tasks easy. For example, to make a call list after a trade show, reps search for “trade show” in tasks, and then filter for the predefined subject “Call” in the predefined subject. And no extra setup is involved because the filters are based on the required Subject field in the Activity Search Results layout. The subject always appears on the search results page and is always filterable.

[Control Access to Activities](#)

You have a new choice for controlling access to activities. Disable the Access Activities permission so users, such as guest users in communities, don't have access to any tasks, events, and emails. That way, your reps and agents can be sure that their work remains private.

Include Reminders with Task Quick Actions

It's easy to make sure that sales reps never forget. When you set up task quick actions, you can include reminders. Previously, users had to create a task and then edit it to set a reminder. Now, when you create a task with the quick action, the action automatically creates a reminder.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

How: Add the *Reminder Set* field to your quick action layouts.

SEE ALSO:

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

[Blog Post: Pro Tip: Boost Productivity with Activity Actions in Lightning Experience](#)

[IdeaExchange: Allow Task Reminders to be set When Creating from a Lightning Quick Action](#)

[IdeaExchange: Reminder Set for New Task in Lead Record](#)

[IdeaExchange: Broken Set Reminder Box in Lightning Quick Action Version](#)

Save Sales Reps Time with Quick Text for Events and Tasks

Do your sales reps have many similar tasks or events? Then we've got good news. Quick text now supports tasks and events. You can use quick text to enter common descriptions like “Confirm date and time for meeting location” instead of typing out the same content over and over.

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

SEE ALSO:

[Use Quick Text in Tasks and Events](#)

[Salesforce Help: Set Up and Use Quick Text \(can be outdated or unavailable during release preview\)](#)

Save Time with Persistent Activity Timeline Filters

Sales reps can save their preferred filter settings in the activity timeline.

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

How: Open a filter, and click **Apply & Save**.

DATE RANGE

All time Last 7 days
 Next 7 days Last 30 days

ACTIVITIES TO SHOW

All activities My activities

ACTIVITY TYPE

All types List email
 Email Logged calls
 Events Tasks

Restore Defaults Apply & Save **Apply**

Choose Which Activity Types Appear in the Activity Timeline

Sales reps can reduce the noise and focus on the activity types that they want to see in the activity timeline.

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

How: Open a filter, and click **All types**. Then deselect the types that you're not interested in.

DATE RANGE

All time Last 7 days
 Next 7 days Last 30 days

ACTIVITIES TO SHOW

All activities My activities

ACTIVITY TYPE

All types List email
 Email Logged calls
 Events Tasks

Restore Defaults Apply & Save **Apply**

See Email Tracking and Bounce Information in the Activity Timeline

Your users want to know the impact their emails are having. They can see bounce and email tracking information with a glance in the activity timeline. Each email activity shows whether the email was opened and when, or if the email isn't being tracked.

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

SEE ALSO:

[Bounce Back from Email Bounces](#)

[Quickly See Whether Customers Open Email from Your Company](#)

[IdeaExchange: View HTML Email Status in Opportunities and Accounts](#)

[IdeaExchange: HTML Email Status in Lightning](#)

[IdeaExchange: Mark Bounced Email Activities as Bounced](#)

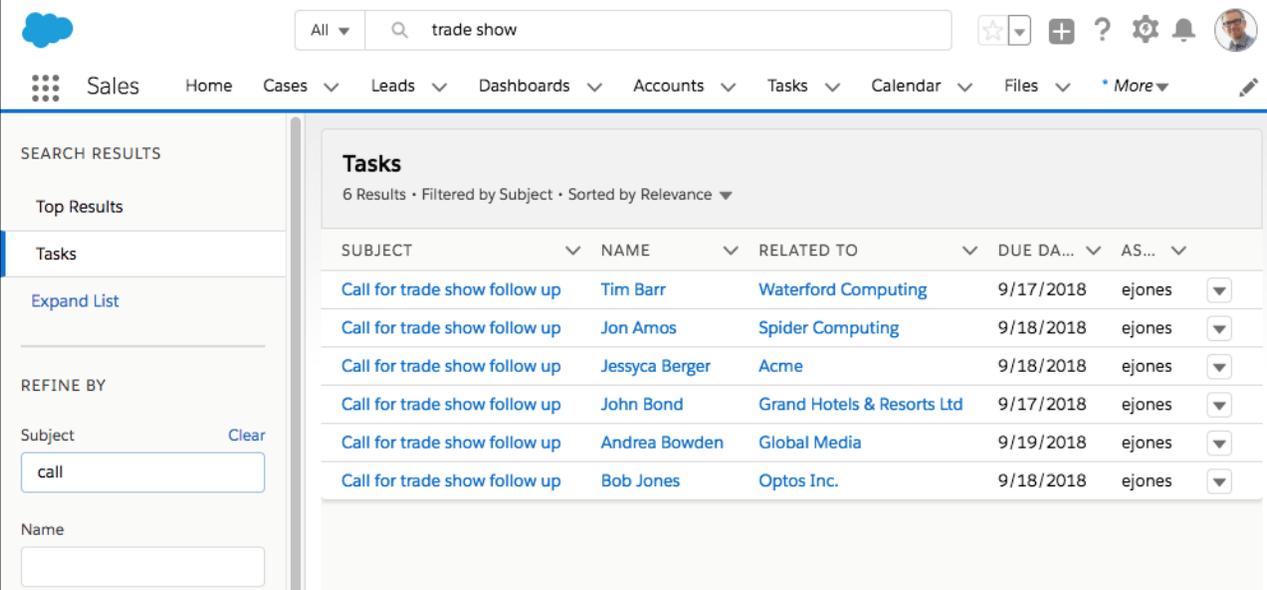
Filter by Task Subject in Global Search Results

Reps can whittle down search results to find tasks with a certain subject. If you use predefined subjects, you can filter for those subjects to make grouping tasks easy. For example, to make a call list after a trade show, reps search for “trade show” in tasks, and then filter for the predefined subject “Call” in the predefined subject. And no extra setup is involved because the filters are based on the required Subject field in the Activity Search Results layout. The subject always appears on the search results page and is always filterable.

Where: This change applies to Lightning Experience in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: On the search results page, click **Tasks** in the sidebar, and then refine the results with your filter.

 **Note:** You can't choose “Call” from a dropdown list; type it instead.



The screenshot shows the Salesforce Lightning Experience interface. At the top, there is a search bar with the text "trade show" and a dropdown menu set to "All". Below the search bar is a navigation menu with options: Sales, Home, Cases, Leads, Dashboards, Accounts, Tasks, Calendar, Files, and More. The main content area is titled "Tasks" and shows 6 results, filtered by subject and sorted by relevance. The results are displayed in a table with columns: SUBJECT, NAME, RELATED TO, DUE DA..., and AS... (Assignee). The results are as follows:

SUBJECT	NAME	RELATED TO	DUE DA...	AS...
Call for trade show follow up	Tim Barr	Waterford Computing	9/17/2018	ejones
Call for trade show follow up	Jon Amos	Spider Computing	9/18/2018	ejones
Call for trade show follow up	Jessyca Berger	Acme	9/18/2018	ejones
Call for trade show follow up	John Bond	Grand Hotels & Resorts Ltd	9/17/2018	ejones
Call for trade show follow up	Andrea Bowden	Global Media	9/19/2018	ejones
Call for trade show follow up	Bob Jones	Optos Inc.	9/18/2018	ejones

On the left sidebar, under "SEARCH RESULTS", the "Tasks" section is selected. Below it, there is a "REFINE BY" section with a "Subject" filter set to "call".

SEE ALSO:

[Salesforce Help: Filter and Sort Search Results in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Control Access to Activities

You have a new choice for controlling access to activities. Disable the Access Activities permission so users, such as guest users in communities, don't have access to any tasks, events, and emails. That way, your reps and agents can be sure that their work remains private.

Where: This change applies to Lightning, all versions of the Salesforce app, and Salesforce Classic in all editions that allow profile changes. This change also applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience, all versions of the Salesforce app, and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Some users, such as guest users in communities, don't need access to tasks, events, and emails. When you disable this permission, users also can't see or create events on calendars.

This permission doesn't change user access to Email-to-Case emails. Emails associated with cases that a user has access to appear in the case feed and the case's email related list.

How: From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**. Select or create a permission set, and then open System Permissions. Based on your user license, update the permission set. Verify that all the users you'd like to have access to activities have this permission enabled on their profile.



Note: Some licenses don't allow permission set changes for this permission.

SEE ALSO:

[Limit Guest User Access to Activities](#)

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

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

Kanban: Recently Viewed Availability, Search Kanban View

Explore the power of the Kanban View from Recently Viewed lists. No need to switch to another view to find records. Search is now available on the Kanban View.

IN THIS SECTION:

[Get the Kanban View for Recently Viewed Lists](#)

Users can switch to the Kanban view from the Recently Viewed list view of almost any object.

[Search for Records in the Kanban View](#)

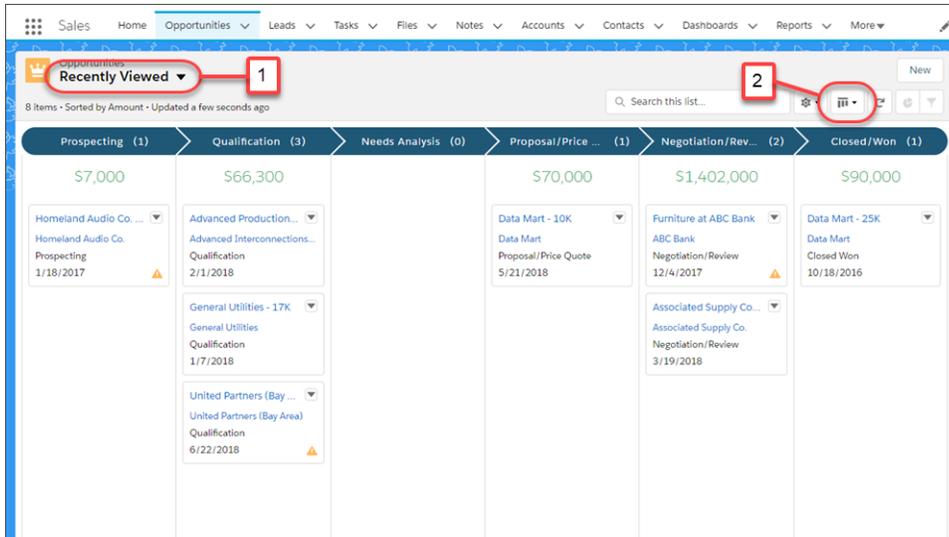
Users can hone in on the records they need faster by searching the selected list view from within the Kanban view.

Get the Kanban View for Recently Viewed Lists

Users can switch to the Kanban view from the Recently Viewed list view of almost any object.

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

How: Select the Recently Viewed list view (1), then select **Kanban** from the **Display As** menu (2).

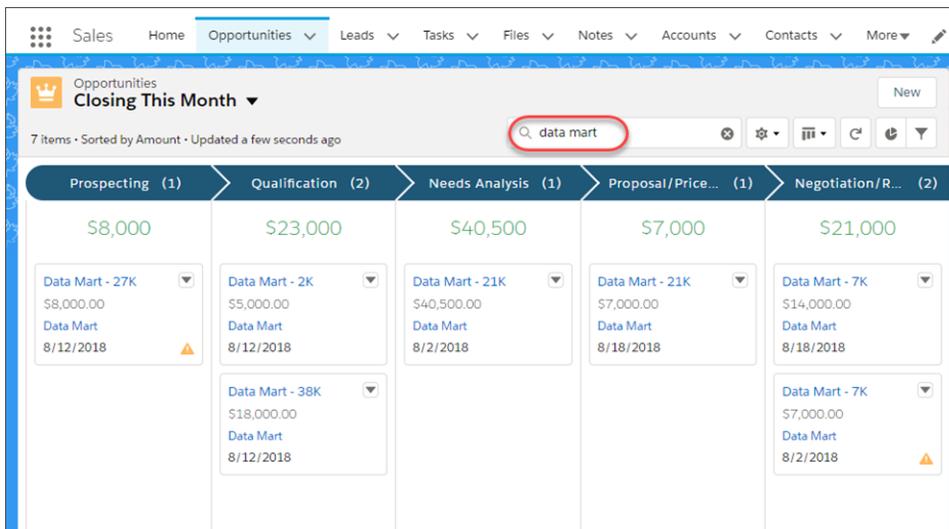


Search for Records in the Kanban View

Users can hone in on the records they need faster by searching the selected list view from within the Kanban view.

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

How: Enter a search term in the search box to see matching records.



Calendar: Event Series and More Task Filters

Sales reps can schedule recurring events from Lightning Experience and the Salesforce app. Plus, reps have more filters to customize which tasks they see on their calendars. And they can make changes to event participants from any user interface.

IN THIS SECTION:

[Schedule Event Series \(Beta\)](#)

Let your reps schedule daily, weekly, monthly, or other repeating events from Lightning Experience and the Salesforce app.

[Customize Which Tasks You See on Your Calendar](#)

Whether reps use list views to sort their tasks by account, due date, or type of work, they can apply those list views as a filter when they create calendars for their tasks. That way, reps can zero in on their most pressing tasks by adding only the most important ones to the calendar. Or reps can create multiple calendars based on different task lists, using different colors to keep tasks organized for a visual reminder on what's what.

[Add and Remove Meeting Participants from Any User Interface](#)

Attendees (in Lightning Experience) and invitees (in Salesforce Classic) are linked to the same data, so updating those fields should be simple. Now when you set up sales reps to work with attendees from Lightning Experience and the Salesforce app, they don't lose access to edit invitees from Salesforce Classic.

Schedule Event Series (Beta)

Let your reps schedule daily, weekly, monthly, or other repeating events from Lightning Experience and the Salesforce app.

Where: This change applies to Lightning Experience and all versions of the mobile app in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, event series is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use event series 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.

How: To let your reps schedule event series, on the page layout for events, add **Repeat**.

Then, to schedule a series, reps can select **Repeat**.

New Event

*** Start**

Date: 10/15/2018 All-Day Event

Time: 1:30 PM Private

Repeat (BETA)

Frequency

Daily **Weekly** Monthly Yearly

Every Week

On Su **M** Tu **W** Th F Sa

Series End Date

None

After 13 Events

On Jan 1, 2019

Cancel Save & New Save

SEE ALSO:

[Productivity Features: Lightning Experience Considerations](#)

[Winter '19 Features That Are Different or Not Available in the Salesforce App](#)

Customize Which Tasks You See on Your Calendar

Whether reps use list views to sort their tasks by account, due date, or type of work, they can apply those list views as a filter when they create calendars for their tasks. That way, reps can zero in on their most pressing tasks by adding only the most important ones to the calendar. Or reps can create multiple calendars based on different task lists, using different colors to keep tasks organized for a visual reminder on what's what.

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

How: When reps create calendars for their tasks from the calendar view, their task list views are available in the list of filters. Reps can select one, and tasks only from that list view are added as a new calendar.

SEE ALSO:

[Salesforce Help: Create a Calendar of Task Due Dates in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Incomplete/Open Tasks to Be Visible in Salesforce Calendar](#)

Add and Remove Meeting Participants from Any User Interface

Attendees (in Lightning Experience) and invitees (in Salesforce Classic) are linked to the same data, so updating those fields should be simple. Now when you set up sales reps to work with attendees from Lightning Experience and the Salesforce app, they don't lose access to edit invitees from Salesforce Classic.

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

How: To let reps update meeting participants from any user interface, add the attendee field to the page layout for events.

SEE ALSO:

[Salesforce Help: Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App \(can be outdated or unavailable during release preview\)](#)

Sales Console: Customized Navigation Items and Improvements to Macros and Quick Text

We're rolling out a slew of features to make your reps more productive in Sales Console. Reps can personalize their navigation item menu and also organize macros and quick text into logical groups. Reps using a Salesforce Classic console app have a faster way to switch to Lightning Experience—just look for a link in the user profile menu.

Where: This change applies to Lightning Experience in Essentials, 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 the Salesforce-provided Sales Console app.

How: Check out the new features available in the Sales Console.

Lightning Console Apps: Customizable Tabs, Customizable Navigation Items, More APIs, and Visualforce Overrides

Make console your own with customizable tab titles, tab icons, and navigation items. You can also generate and open console URLs, and set your navigation item with the Lightning Console JavaScript API. Visualforce override support in console apps allow you to leverage your Visualforce overrides in Salesforce Classic.

Productivity: Folders and Sharing and Buttons, Oh My

Organize macros and quick text to easily find what you're looking for. Share entire folders to give other users quick and easy access to all macros or quick text inside that folder. New buttons in emails, events, and tasks make inserting text easier and more visible.

Switch to Lightning Experience Directly from Your Salesforce Classic Console App

It's now easier to access Lightning Experience from your Salesforce Classic console apps. Just click the **Switch to Lightning Experience** link in your user profile menu. The link shows up automatically for all users in a Salesforce Classic console app.

Change Your View with Display Density Settings

Your reps can control how they view data with two new Lightning Experience display density settings. You don't even need to modify a page layout. Reps simply change the density of their console from their user profile menu.

SEE ALSO:

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

Lightning Data: Match Selection, More Usable Labels

Sales reps can now control matches between Lightning Data records and your accounts or leads. And changes to some labels make Lightning Data easier to use.

IN THIS SECTION:

[Select a Match When the Automatic Match Isn't the Right One](#)

Some Lightning Data packages select matches automatically using the highest match score that meets the threshold you set. But sometimes the automatic match isn't the best one. Sales reps can now override automatic matches. They can even choose from matches with a score below the threshold.

[Status Label Not Found Was Changed](#)

To improve the usability of Lightning Data matching, the status indicating that no similar records are available was changed to No Match. Previously, the status was labeled Not Found.

[Match Confidence Score Label Was Changed](#)

To improve the usability of Lightning Data matching, the label Match Score replaces Match Confidence Score. The score indicates how closely a Lightning Data record matches a Salesforce record. It helps improve automatic and manual matches.

[Address Field Labels Were Changed](#)

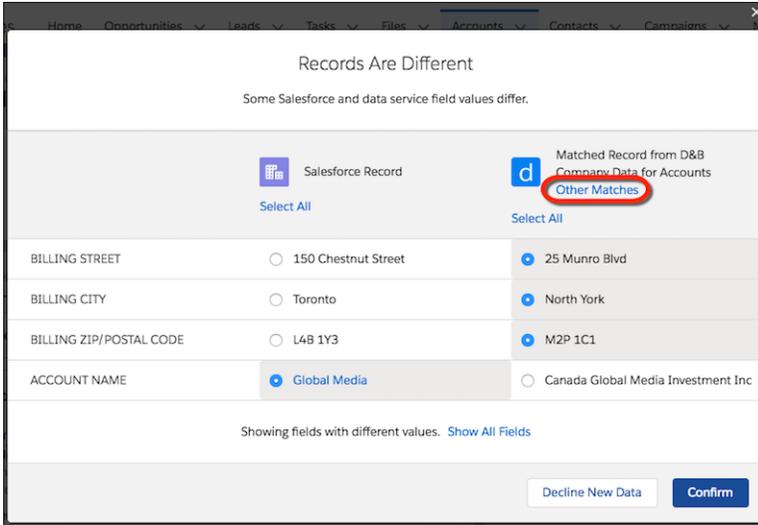
To align Lightning Data fields with standard objects and improve usability internationally, the label State was changed to State/Province, and Zip was changed to Zip/Postal Code.

Select a Match When the Automatic Match Isn't the Right One

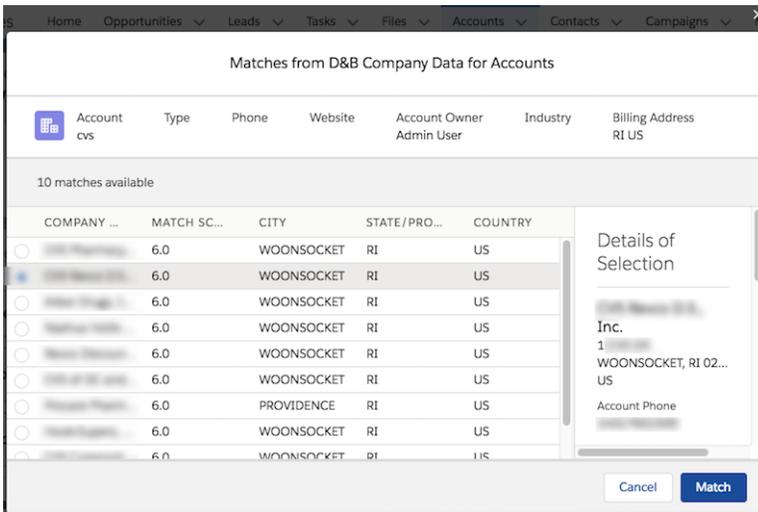
Some Lightning Data packages select matches automatically using the highest match score that meets the threshold you set. But sometimes the automatic match isn't the best one. Sales reps can now override automatic matches. They can even choose from matches with a score below the threshold.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions when using Lightning Data packages based on D&B Optimizer to update accounts or leads.

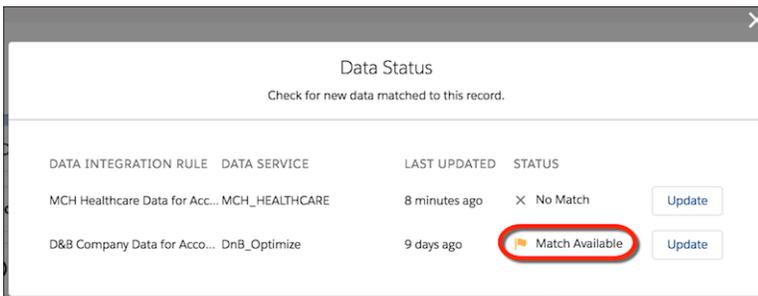
Why: Suppose that Lightning Data finds several matches for a record, and at least one match has a score that meets the minimum you've set. The record with the highest match score is selected automatically. To override the automatic match, a sales rep clicks **Other Matches**.



Up to 10 matches are shown. Match score and other relevant details help the rep choose.



Now suppose that Lightning Data finds only matches with scores below the minimum match score, so there's no automatic match. Instead, the Salesforce record is given a Match Available status.



To see the matches, a rep clicks **Update**.

SEE ALSO:

[Match Confidence Score Label Was Changed](#)

[Salesforce Help: Test the Match Score Setting \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Check for New Data Matched to a Record in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[AppExchange: Lightning Data](#)

Status Label Not Found Was Changed

To improve the usability of Lightning Data matching, the status indicating that no similar records are available was changed to No Match. Previously, the status was labeled Not Found.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions when using Lightning Data packages to update records.

SEE ALSO:

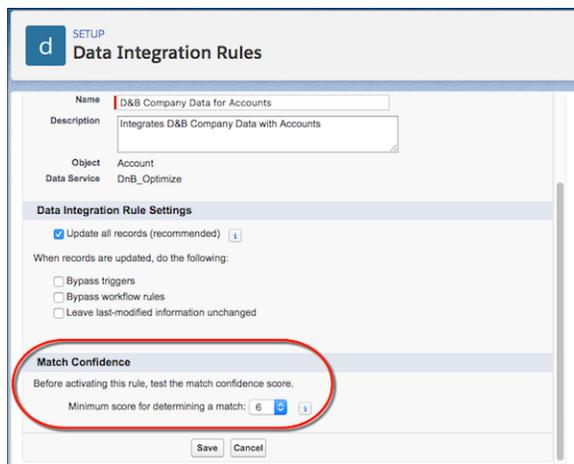
[Salesforce Help: Data Statuses \(can be outdated or unavailable during release preview\)](#)

Match Confidence Score Label Was Changed

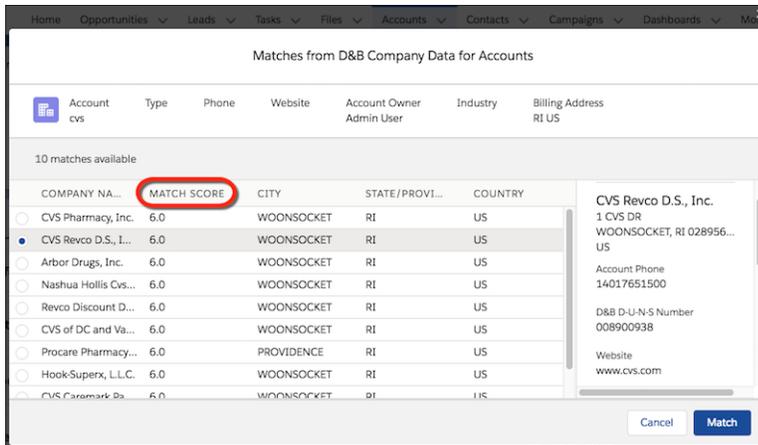
To improve the usability of Lightning Data matching, the label Match Score replaces Match Confidence Score. The score indicates how closely a Lightning Data record matches a Salesforce record. It helps improve automatic and manual matches.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions when using Lightning Data packages to update records.

Why: The minimum match score setting is part of the rule settings for packages that support match scores.



And the match score now appears when sales reps are choosing from the possible matches for a record.

**SEE ALSO:**

[Select a Match When the Automatic Match Isn't the Right One](#)

[Salesforce Help: Test the Match Score Setting \(can be outdated or unavailable during release preview\)](#)

Address Field Labels Were Changed

To align Lightning Data fields with standard objects and improve usability internationally, the label State was changed to State/Province, and Zip was changed to Zip/Postal Code.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions when using Lightning Data packages to import records.

SEE ALSO:

[Salesforce Help: Discover Companies to Import as Accounts in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Integration with Google: Increased Productivity While Composing Emails and Sync for API-Triggered Changes

Get your reps working their Salesforce deals directly in Gmail™ and Google Calendar. If you've customized Salesforce to create or edit events through the API, now those changes sync with reps' calendars. Lightning for Gmail includes the option to upgrade to a premium experience, which includes a suite of features to increase your reps' productivity when composing emails.

IN THIS SECTION:

[Lightning for Gmail: Increase Productivity with Inbox Beta for Gmail \(Beta\)](#)

Inbox Beta for Gmail brings together the best features of Lightning for Gmail and Salesforce Inbox in one solution. It includes all the features of the standard version of Lightning for Gmail, plus features to increase sales reps' productivity while working in email.

[Lightning Sync for Google: Syncing for API-Triggered Updates and Flexible Sync Options](#)

Improvements to Lightning Sync mean more of your sales reps' events sync with their Google apps. For example, now changes made to events through the API and more events created in Salesforce Classic sync.

Lightning for Gmail: Increase Productivity with Inbox Beta for Gmail (Beta)

Inbox Beta for Gmail brings together the best features of Lightning for Gmail and Salesforce Inbox in one solution. It includes all the features of the standard version of Lightning for Gmail, plus features to increase sales reps' productivity while working in email.

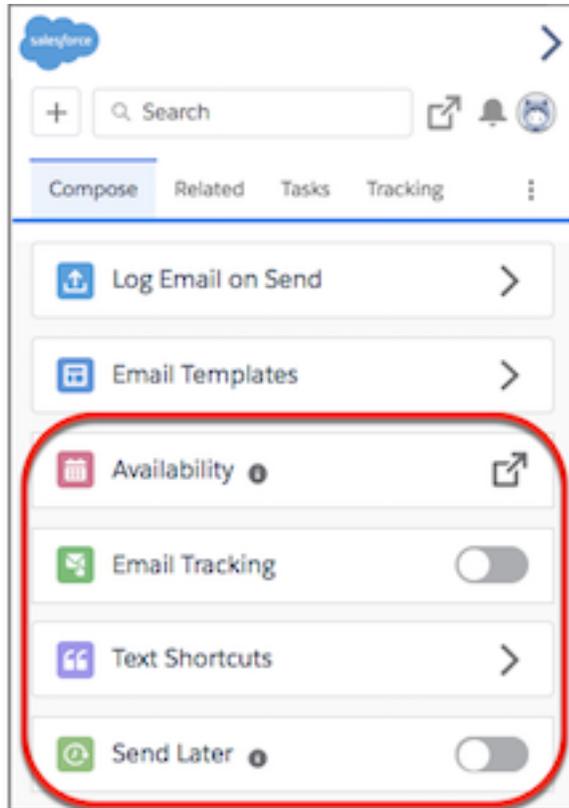
Where: This feature is available for an extra cost in Lightning Experience and Salesforce Classic in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Inbox Beta for Gmail 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 Gmail in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Who: Inbox Beta for Gmail is available to users with an Inbox license who have the Lightning for Gmail add-in installed and are running in Gmail.

Why: Using Inbox Beta for Gmail features, sales reps can be even more productive.

- See custom objects as related Salesforce objects. Lightning for Gmail suggests accounts, opportunities, and cases that match addresses on emails and events. In Inbox Beta for Gmail, you 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.
- Save and insert your most common phrases. Create shortcuts for the phrases you use the most and let us do your typing for you. Shortcuts save you time and help to ensure consistency in the messages you write. Use shortcuts for smaller sections of text that don't require an email template.



How: An Inbox license is required to run Inbox features. If you're using Lightning for Gmail, contact your Salesforce representative to purchase Inbox. Assign each sales rep the Inbox With Einstein Activity Capture or the Inbox Without Einstein Activity Capture permission set, depending on your Einstein Activity Capture setup. To move to Inbox Beta for Gmail (Beta) from Salesforce Inbox, each sales rep replaces the Salesforce Inbox Chrome extension with the Inbox Beta for Gmail Chrome extension.

SEE ALSO:

[Salesforce Help: Select Who Can Use Inbox Beta for Gmail Features \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Move Sales Reps to Inbox Beta for Gmail \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Lightning Sync for Google: Syncing for API-Triggered Updates and Flexible Sync Options

Improvements to Lightning Sync mean more of your sales reps' events sync with their Google apps. For example, now changes made to events through the API and more events created in Salesforce Classic sync.

IN THIS SECTION:

[Get More Flexibility with Event Sync and Edit Options](#)

Set up sales reps who are working from Salesforce Classic to sync both ways or from Salesforce to Google. When you do, reps can continue to create and edit events from Salesforce Classic. With these additional sync and edit options in Salesforce Classic, reps have the flexibility to work where it makes the most sense for your business processes.

[Sync Event Changes Made Through the API](#)

Keep more of your data in sync between Salesforce and Google apps. If you've customized Salesforce to create or edit events through the API, now those changes sync with reps' calendars.

Get More Flexibility with Event Sync and Edit Options

Set up sales reps who are working from Salesforce Classic to sync both ways or from Salesforce to Google. When you do, reps can continue to create and edit events from Salesforce Classic. With these additional sync and edit options in Salesforce Classic, reps have the flexibility to work where it makes the most sense for your business processes.

Where: This change applies to Salesforce Classic and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: If your reps are already set up to sync both ways or from Salesforce to Google, no setup is necessary. Events created and edited in Salesforce Classic sync automatically. If you want to change reps' sync directions, adjust them from Lightning Sync configurations in Setup.

SEE ALSO:

[Salesforce Help: Define Lightning Sync for Google Settings for Reps \(can be outdated or unavailable during release preview\)](#)

Sync Event Changes Made Through the API

Keep more of your data in sync between Salesforce and Google apps. If you've customized Salesforce to create or edit events through the API, now those changes sync with reps' calendars.

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

Who: This change impacts users who are set up to sync events from Salesforce to Google Calendar™, or sync both ways.

How: The usual Lightning Sync and event limits apply. In addition, changes to attendees (Lightning Experience) or invitees (Salesforce Classic) don't trigger sync when made through the API. Attendees and invitees changes will sync if changes are made to other syncing fields on the event.

No setup is necessary. Supported changes made through the API will sync automatically based on reps' existing sync configurations.

SEE ALSO:

[SOAP API Developer Guide: Event](#)

[Salesforce Help: Learn How Your Stuff Syncs with Lightning Sync \(can be outdated or unavailable during release preview\)](#)

Integration with Microsoft®: Outlook Integration with Inbox Features General Availability, Event Series Sync, Salesforce for Outlook Availability Change

The Outlook integration with Inbox is now generally available and brings together the best features of Outlook integration and Salesforce Inbox in one solution. Improvements to Lightning Sync mean more of your sales reps' events sync. If you've never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer offered. But our latest products, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync, are ready to serve you. Connect for office enters retirement in early 2019.

IN THIS SECTION:

[Outlook Integration: Combined Add-In in the Office Store, Inbox Features General Availability, and Text Shortcuts](#)

Lightning for Outlook and Salesforce Inbox are now available in a combined add-in. Plus, the premium experience with Inbox is generally available with additional features.

[Lightning Sync for Microsoft® Exchange: Event Series and Syncing for API-Triggered Updates](#)

Improvements to Lightning Sync mean more of your sales reps' events sync with their Microsoft apps. For example, now event series that reps create in Lightning Experience and the Salesforce app sync. And changes made to events through the API sync, too.

[Salesforce for Outlook: Product Availability and Versions](#)

Get the latest news on product availability and versions.

[Connect for Office: Retirement Planned for February 2019](#)

Get ready to say goodbye to the Microsoft® Excel and Microsoft® Word Add-Ons and standard Mail Merge. If your sales reps still use these features, check out our product retirement articles for more details.

Outlook Integration: Combined Add-In in the Office Store, Inbox Features General Availability, and Text Shortcuts

Lightning for Outlook and Salesforce Inbox are now available in a combined add-in. Plus, the premium experience with Inbox is generally available with additional features.

IN THIS SECTION:

[Lightning for Outlook and Salesforce Inbox Combined into a Single Add-In](#)

In the Microsoft store, the listing for Lightning for Outlook is now called Salesforce. The integration brings sales reps the Salesforce experience within Microsoft® Outlook®, whether they're set up to use standard features or premium Inbox features.

[Increase Productivity with the Outlook Integration with Inbox \(Generally Available\)](#)

The Outlook integration with Inbox, named Inbox Beta for Outlook in Summer '18, brings together the best features of the Outlook integration and Salesforce Inbox in one solution.

[Save Time and Improve Consistency with Text Shortcuts](#)

Do you write the same sentences over and over, or use the same signature phrases in all your emails? Save yourself time and create shortcuts for the phrases you use the most. Use shortcuts for smaller sections of text that don't require an email template.

Lightning for Outlook and Salesforce Inbox Combined into a Single Add-In

In the Microsoft store, the listing for Lightning for Outlook is now called Salesforce. The integration brings sales reps the Salesforce experience within Microsoft® Outlook®, whether they're set up to use standard features or premium Inbox features.

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

How: The Salesforce add-in available in the Microsoft store is an update to the Lightning for Outlook add-in and is the go-to add-in that replaces the Inbox add-in. The single add-in provides the base Outlook integration features, and the option to add Inbox features for users with an Inbox license. If you're already using Lightning for Outlook, you're all set and don't need to replace the Lightning for Outlook add-in you have installed. Find all the Outlook integration settings on the Outlook integration and Sync page in Salesforce setup.

Increase Productivity with the Outlook Integration with Inbox (Generally Available)

The Outlook integration with Inbox, named Inbox Beta for Outlook in Summer '18, brings together the best features of the Outlook integration and Salesforce Inbox in one solution.

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

Who: Inbox features are available within the Outlook integration to users with an Inbox license who are running Microsoft Outlook.

How: An Inbox license is required to run Inbox features. If you're using the Outlook integration, contact your Salesforce representative to purchase Inbox. 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 setup.

To move to the Outlook integration with Inbox from Salesforce Inbox, have each sales rep replace the Salesforce Inbox add-in with the Salesforce add-in available in the Microsoft store.

SEE ALSO:

[Salesforce Help: Move Sales Reps to Outlook Integration with Inbox \(can be outdated or unavailable during release preview\)](#)

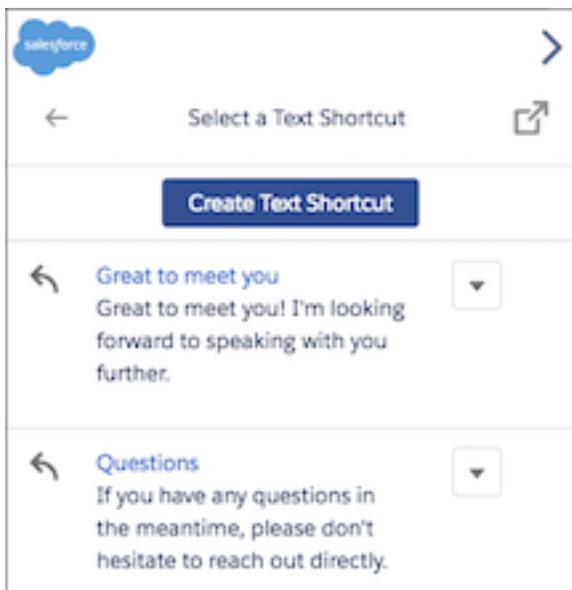
Save Time and Improve Consistency with Text Shortcuts

Do you write the same sentences over and over, or use the same signature phrases in all your emails? Save yourself time and create shortcuts for the phrases you use the most. Use shortcuts for smaller sections of text that don't require an email template.

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

Who: Text shortcuts are available to Outlook integration with Inbox users.

Why: Use a text shortcut for anything from salutations to tag lines, to sentences and paragraphs that you want to ensure are the same in all the emails you send.



How: If you use the default email application pane for the Outlook integration with Inbox, the Text Shortcuts component is automatically included for users with an Inbox license. If you've created custom versions of the email application pane, add the Text Shortcuts component to the pane using the Lightning App Builder.

SEE ALSO:

[Salesforce Help: Build Custom Outlook Integration Panes \(can be outdated or unavailable during release preview\)](#)

Lightning Sync for Microsoft® Exchange: Event Series and Syncing for API-Triggered Updates

Improvements to Lightning Sync mean more of your sales reps' events sync with their Microsoft apps. For example, now event series that reps create in Lightning Experience and the Salesforce app sync. And changes made to events through the API sync, too.

IN THIS SECTION:

[Sync Event Series Between Microsoft® Calendars and Salesforce](#)

Now that event series are available as a beta feature in Lightning Experience and the Salesforce app, sales reps can keep events in sync between calendars. Reps can create, reschedule, or cancel events from both Salesforce and Microsoft calendars.

[Sync Event Changes Made Through the API](#)

Keep more of your data in sync between Salesforce and Microsoft® apps. If you've customized Salesforce to create or edit events through the API, now those changes now sync with reps' Microsoft calendars.

[Get More Flexibility with Event Sync and Edit Options](#)

Set up sales reps who are working from Salesforce Classic to sync both ways or from Salesforce to Microsoft® Exchange. When you do, reps can continue to create and edit events from Salesforce Classic. With these additional sync and edit options, reps have the flexibility to work where it makes the most sense for your business processes.

[Lightning Sync Page in Setup Has a New Name](#)

Now that Lightning for Outlook is called Outlook Integration, we've renamed the setup page, too. Update your configurations and other Lightning Sync settings from the Outlook Integration and Sync Setup page.

Sync Event Series Between Microsoft® Calendars and Salesforce

Now that event series are available as a beta feature in Lightning Experience and the Salesforce app, sales reps can keep events in sync between calendars. Reps can create, reschedule, or cancel events from both Salesforce and Microsoft calendars.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Set up your sales reps to sync event series from their sync configurations. Under Event Filters, select **Sync event series**.

The screenshot shows the Salesforce Setup page for Outlook integration. At the top, there is a 'SETUP' header with a gear icon. Below this, there are four rows of configuration options, each with a dropdown menu set to '--None--' and an 'AND' label. Below these rows are 'Add Row' and 'Remove Row' buttons. The 'Other Contacts to Include' section has a checkbox for 'Sync contacts users follow in Chatter'. The 'Event Filters' section includes a 'Filter By End Date' dropdown set to 'Greater or equal to TODAY'. The 'Additional Settings for Events' section has several checkboxes: 'Sync private events', 'Delete synced events', 'Automatically relate Exchange events to Salesforce records', and 'Sync event series (BETA)'. The 'Sync event series (BETA)' checkbox is highlighted with a red circle. At the bottom, there are 'Save' and 'Cancel' buttons.

Sync Event Changes Made Through the API

Keep more of your data in sync between Salesforce and Microsoft® apps. If you've customized Salesforce to create or edit events through the API, now those changes now sync with reps' Microsoft calendars.

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

Who: This change impacts users who are set up to sync events from Salesforce to their Microsoft calendars, or sync both ways.

How: The usual Lightning Sync and event limits apply. In addition, changes to attendees (Lightning Experience) or invitees (Salesforce Classic) don't trigger sync when made through the API. Attendees and invitees changes will sync if changes are made to other syncing fields on the event.

No setup is necessary. Supported changes made through the API will sync automatically based on reps' existing sync configurations.

SEE ALSO:

[SOAP API Developer Guide: Event](#)

[Salesforce Help: Learn How Your Stuff Syncs with Lightning Sync \(can be outdated or unavailable during release preview\)](#)

Get More Flexibility with Event Sync and Edit Options

Set up sales reps who are working from Salesforce Classic to sync both ways or from Salesforce to Microsoft® Exchange. When you do, reps can continue to create and edit events from Salesforce Classic. With these additional sync and edit options, reps have the flexibility to work where it makes the most sense for your business processes.

Where: This change applies to Salesforce Classic and all versions of the mobile app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: If your reps are already set up to sync both ways or from Salesforce to Exchange, no setup is necessary. Events created and edited in Salesforce Classic sync automatically. If you want to change reps' sync directions, adjust them from Lightning Sync configurations in Setup.

SEE ALSO:

[Salesforce Help: Define Lightning Sync for Google Settings for Reps \(can be outdated or unavailable during release preview\)](#)

Lightning Sync Page in Setup Has a New Name

Now that Lightning for Outlook is called Outlook Integration, we've renamed the setup page, too. Update your configurations and other Lightning Sync settings from the Outlook Integration and Sync Setup page.

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

SEE ALSO:

[Lightning for Outlook and Salesforce Inbox Combined into a Single Add-In](#)

Salesforce for Outlook: Product Availability and Versions

Get the latest news on product availability and versions.

IN THIS SECTION:

[Salesforce for Outlook Not Available for Customers New to the Product](#)

If you've never set up Salesforce for Outlook or your reps aren't regularly logging in to the side panel, service is no longer offered for your org. The good news is that our next-generation products, Outlook Integration (formerly known as Lightning for Outlook) and Lightning Sync, are better than ever and ready to serve you. And because we have experience to build on, the products introduce significant improvements for integrating with Microsoft.

[No Salesforce for Outlook Patches Planned](#)

For now, we don't have plans to release a new version of Salesforce for Outlook in Winter '19. Regular users can continue working from Salesforce for Outlook v3.4.3, and if needed, download that client from the Salesforce for Outlook download page. Better yet, if you're ready to take advantage of enhanced functionality and effortless upgrades, move to our next-generation features, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync.

[Reminder About Functionality Loss for Earlier Versions](#)

When Microsoft® retired Internet Explorer® 8, 9, and 10, Salesforce for Outlook stopped supporting those browsers. As a result, earlier Salesforce for Outlook versions built to run on those browsers lost some side panel functionality. Remember that to continue working with Salesforce for Outlook, orgs with regular users can upgrade to Salesforce for Outlook v3.4.3, which runs on the still-supported Internet Explorer 11. Or better yet, take this opportunity to give users enhanced functionality and effortless upgrades by moving to our next-generation features, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync.

Salesforce for Outlook Not Available for Customers New to the Product

If you've never set up Salesforce for Outlook or your reps aren't regularly logging in to the side panel, service is no longer offered for your org. The good news is that our next-generation products, Outlook Integration (formerly known as Lightning for Outlook) and Lightning Sync, are better than ever and ready to serve you. And because we have experience to build on, the products introduce significant improvements for integrating with Microsoft.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Contact Manager, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Starting in Winter '19, if you have never set up Salesforce for Outlook, the product isn't available for your org. Or, if you have set up the product but no users have logged in since Spring '18, the product is no longer available for any users in your org. As the Salesforce admin, you can't access previously created Outlook configurations or create new ones.

If you have at least one Salesforce for Outlook user who has logged in during the last release, service continues to be available for all users in your org. Any user can log in or download the latest client. Admins can create and edit Outlook configurations, including adding and removing users.

Why: Reps can do the same great things they did with Salesforce for Outlook, but Outlook Integration and Lightning Sync are better. They're 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, along with the Salesforce releases you get three times a year.
- Are available whether your users are working in Salesforce Classic or Lightning Experience.
- Offer our most innovative features: custom layouts for different users, an improved email experience, and end-to-end control of reps' sync experience to save them from fussing with settings.

How: To learn whether you have access to Salesforce for Outlook, admins can navigate to the Outlook Configuration page in Setup. Users can navigate to the Salesforce for Outlook Desktop Add-On page in their personal settings. From both pages, customers without access see an announcement that Salesforce for Outlook is no longer available. On the Outlook Configuration page, admins are provided setup resources for Outlook Integration and Lightning Sync. We've linked those resources here, so you don't have to hunt for them.

SEE ALSO:

[Trailhead: Make the Move from Salesforce for Outlook \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning for Outlook System Requirements \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Lightning Sync System Requirements \(can be outdated or unavailable during release preview\)](#)

No Salesforce for Outlook Patches Planned

For now, we don't have plans to release a new version of Salesforce for Outlook in Winter '19. Regular users can continue working from Salesforce for Outlook v3.4.3, and if needed, download that client from the Salesforce for Outlook download page. Better yet, if you're ready to take advantage of enhanced functionality and effortless upgrades, move to our next-generation features, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync.

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 release notes periodically to learn whether a new version is available in Winter '19.

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 \(can be outdated or unavailable during release preview\)](#)

Reminder About Functionality Loss for Earlier Versions

When Microsoft® retired Internet Explorer® 8, 9, and 10, Salesforce for Outlook stopped supporting those browsers. As a result, earlier Salesforce for Outlook versions built to run on those browsers lost some side panel functionality. Remember that to continue working with Salesforce for Outlook, orgs with regular users can upgrade to Salesforce for Outlook v3.4.3, which runs on the still-supported Internet Explorer 11. Or better yet, take this opportunity to give users enhanced functionality and effortless upgrades by moving to our next-generation features, Outlook Integration (previously called Lightning for Outlook) and Lightning Sync.

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

How: Your users see a message in the side panel to alert them that they're working on an outdated version of Salesforce for Outlook. The message encourages users to upgrade to Internet Explorer 11 to avoid unexpected behavior.

SEE ALSO:

[Spring '17 Release Notes: Support Ending for Several Microsoft® Applications](#)

[Salesforce Help: Salesforce for Outlook System Requirements \(can be outdated or unavailable during release preview\)](#)

[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 \(can be outdated or unavailable during release preview\)](#)

Connect for Office: Retirement Planned for February 2019

Get ready to say goodbye to the Microsoft® Excel and Microsoft® Word Add-Ons and standard Mail Merge. If your sales reps still use these features, check out our product retirement articles for more details.

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

SEE ALSO:

[Knowledge Article: Connect for Office Excel Add-in Will Be Retired](#)

[Knowledge Article: Connect for Office Word Add-in and Standard Mail Merge Will Be Retired](#)

Salesforce CPQ and Billing: More Subscription Options and Pricing Strategies and Enhancements to Invoicing and Payment Gateway

Create subscriptions that never expire, and price products based on usage. Save time with pre-populated order fields in Lightning. Explore expanded functionality for tracking gateway responses, consolidating billing transactions across new orders and order cancellations, and more .

IN THIS SECTION:

[Salesforce CPQ: More Subscription Type and Pricing Options, Improved Pricing Method for Percent of Total Products, and Reduced Data Entry in Lightning](#)

Allow customers to receive services indefinitely, price your products based on customer usage, price percent of total products based on the whole bundle, and pre-populate order fields in Lightning to reduce data entry.

[Salesforce Billing: Enhancements to Payment Gateway and Revenue Adjustments, Simplified Management for Multiple Billing Transactions, and Easier Cancellations for Order Products](#)

Track your gateway responses, refund failed payments, and change your revenue schedule balances. Consolidate your billing transactions into a single invoice line and create a cancellation invoice plan.

Salesforce CPQ: More Subscription Type and Pricing Options, Improved Pricing Method for Percent of Total Products, and Reduced Data Entry in Lightning

Allow customers to receive services indefinitely, price your products based on customer usage, price percent of total products based on the whole bundle, and pre-populate order fields in Lightning to reduce data entry.

 **Note:** Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

IN THIS SECTION:

[Set Up Salesforce CPQ Winter '19](#)

After installing the new Salesforce CPQ package, set up new features and update page layouts.

[Generate Subscriptions Without End Dates](#)

Salesforce CPQ users can now create contracts with subscriptions that don't have end dates, and therefore, don't need to be renewed. Evergreen subscriptions allow customers to receive services indefinitely until their contract subscriptions are canceled.

[Setting Price Rates for Usage-Based Products \(Beta\)](#)

Set prices for your subscription products based on predefined rates for user consumption of the product or service you're selling. You can configure your units of usage and set up different pricing rates based on volume of usage.

[Price Percent of Total Products Based on the Entire Bundle](#)

We've added the Entire Hierarchy value to the product option's Percent of Total Scope field. Choose it to base your percent of total product's price off the entire bundle configuration that it's a part of, including all parent and child bundles. This scope excludes only other percent of total products in the configuration.

[Order Fields Pre-Populated in Lightning](#)

The Create Order action in Lightning now pre-populates default order header fields. This feature streamlines manual order creation in Lightning, reducing manual data entry and ensuring data accuracy.

[Use the Improved Rich Text Editor](#)

The Salesforce CPQ rich text editor now uses the same HTML tags as Lightning Experience, which makes for a more consistent experience. The new rich text editor uses a few different HTML tags compared to the rich text editor that we used in Salesforce CPQ Summer '18 and earlier.

Set Up Salesforce CPQ Winter '19

After installing the new Salesforce CPQ package, set up new features and update page layouts.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

How:

1. Once you've received your package installation link for Salesforce CPQ 216 (Winter '19), follow the steps in https://help.salesforce.com/articleView?id=cpq_install_cpq_package.htm.

 **Important:** If you're upgrading from a version before Salesforce CPQ 214.12.2, upgrade to 214.12.2 or a later 214 version first. Then, upgrade to your desired 216 version.

2. After installation, add the following picklist value to the product option's Percent of Total Scope field.
 - Label: Entire Hierarchy
 - API Name: Entire Hierarchy

Generate Subscriptions Without End Dates

Salesforce CPQ users can now create contracts with subscriptions that don't have end dates, and therefore, don't need to be renewed. Evergreen subscriptions allow customers to receive services indefinitely until their contract subscriptions are canceled.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Who: Evergreen subscriptions are available for Salesforce CPQ users.

How: To enable evergreen subscriptions, you must first [Configure Salesforce CPQ Package Settings](#).

Navigate to **Subscriptions and Renewals** and then select **Enable Evergreen Subscriptions**. Save your changes.

If you are an existing Salesforce CPQ user, manually add the new picklist values to the Subscription Type field on the product:

- Evergreen
- Renewable/Evergreen

The picklist values are automatically added to the Subscription Type field for new Salesforce CPQ users.

To add the evergreen checkbox to your contract page layout, find the page layout for contracts.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter *Object Manager*, and then select Object Manager. Next, click **Contract**, and then scroll to the **Page Layouts** section.
- If you're using Salesforce Classic, from Setup, in the Quick Find box, enter *Contract*, and then select **Page Layouts**.

Next to CPQ Contract Layout, click **Edit**. From the top panel, enter *Evergreen* into the Quick Find box. Drag the field to an empty section, then save your changes.

SEE ALSO:

[Salesforce Help: Evergreen Subscriptions](#)

[Salesforce Help: Setting Up Your Evergreen Subscriptions](#)

[Salesforce Help: Quote and Manage Evergreen Subscriptions](#)

Setting Price Rates for Usage-Based Products (Beta)

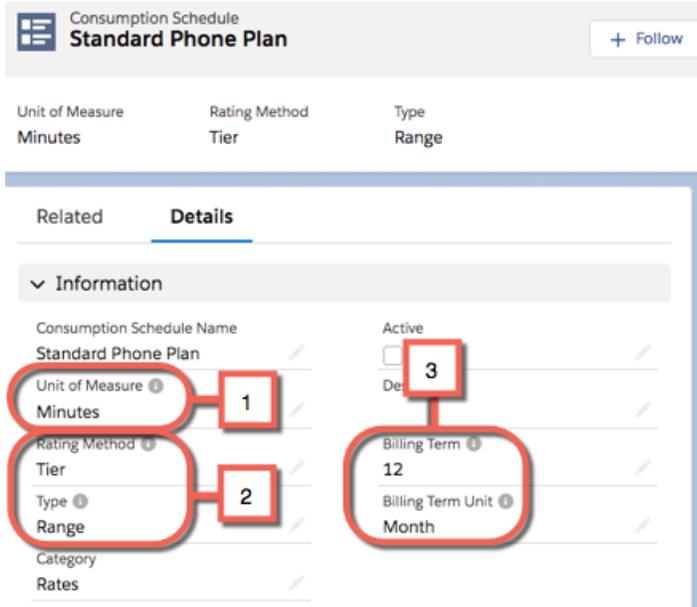
Set prices for your subscription products based on predefined rates for user consumption of the product or service you're selling. You can configure your units of usage and set up different pricing rates based on volume of usage.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

 **Note:** As a beta feature, Usage-Based Pricing 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 Usage-Based Pricing in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

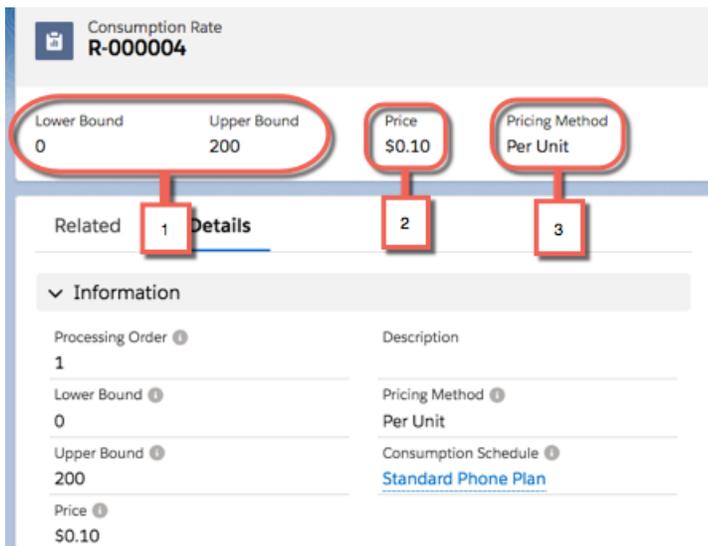
Why: Usage-based pricing allows sales reps to set price rates for consumable services. Price rates are often determined through customer negotiation, research on customer spending trends, and discussion with the pricing strategy team.

How: After the sales rep agrees on a rating plan, they can use the Consumption Schedule object to group the rates in Salesforce.



Consumption schedules define the unit of measurement (1) and rating method (2) for all of your rates. You can associate one consumption schedule with several products, or several consumption schedules to one product that has multiple types of usage. The consumption schedule also defines the billing frequency (3) that Salesforce Billing uses to invoice the product.

All consumption schedules require at least one consumption rate.



The consumption rate sets a unit-based boundary for usage (1) and defines the pricing rate (2) for product that falls within that boundary. The pricing method (3) specifies whether to price usage in that boundary at flat rate or per unit of usage. For example, a consumption schedule for a phone dataplan could have two consumption rates: \$0.10 per minute for the first 200 minutes, and \$0.20 per minute for 201 minutes or more.

When you invoice your customer for a usage product, you'll set the product's actual price based on the customer's usage amount during the usage period and where that amount falls in your consumption rates.

SEE ALSO:

- [Salesforce Help: Usage-Based Products \(Beta\)](#)
- [Salesforce Help: Defining Usage Product Price Rates \(Beta\)](#)
- [Salesforce Help: Use Cases for Usage-Based Pricing \(Beta\)](#)
- [Salesforce Help: Create a Basic Usage Pricing Setup \(Beta\)](#)

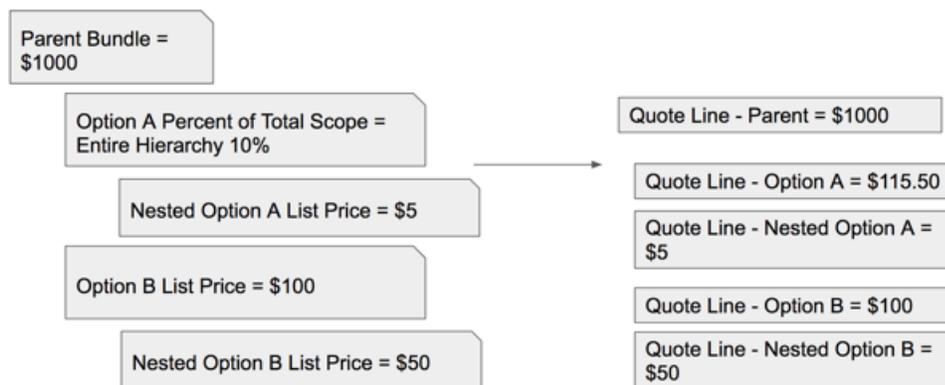
Price Percent of Total Products Based on the Entire Bundle

We've added the Entire Hierarchy value to the product option's Percent of Total Scope field. Choose it to base your percent of total product's price off the entire bundle configuration that it's a part of, including all parent and child bundles. This scope excludes only other percent of total products in the configuration.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

Why: Previously, percent of total scopes couldn't cover child bundles or anything above the first level of a parent bundle. You had to make several percent of total products to cover every bundle configuration within a product. Hierarchy scopes reduce the number of percent of total products required to cover your bundle's entire configuration. This scope is useful if you want a single warranty percent of total product option that covers a bundle with several levels of parent and child bundles.

In this example, Option A includes the entire configuration's \$1155 in its scope.



How: On your product option for a percent of total product, choose the Entire Hierarchy value for the Percent of Total Scope field.

SEE ALSO:

- [Salesforce Help: Use Percent of Total Products in a Bundle](#)

Order Fields Pre-Populated in Lightning

The Create Order action in Lightning now pre-populates default order header fields. This feature streamlines manual order creation in Lightning, reducing manual data entry and ensuring data accuracy.

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

How: Check that My Domain is enabled. The process to add the button to your page layout is the same for your opportunity and quote. To add the Lightning Action to your page layout, have your admin follow these steps. For example, to add the action to your opportunity

page, find the page layout for Opportunity. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.

Next, click **Opportunity**, and then scroll to the **Page Layouts** section. Next to CPQ Order Layout, click **Edit**. Navigate to **Mobile & Lightning Actions** and enter *Create Order* into the Quick Find box.

 **Note:** There are two Create Order buttons, one for Salesforce Classic and one for Lightning Experience. Hover over the button to see the name. Make sure to select the button with the name **Opportunity.CreateOrderLightning** or **Quote.CreateOrderLightning**.

Drag the action to an empty section under Lightning Experience Actions, then save your changes.

Use the Improved Rich Text Editor

The Salesforce CPQ rich text editor now uses the same HTML tags as Lightning Experience, which makes for a more consistent experience. The new rich text editor uses a few different HTML tags compared to the rich text editor that we used in Salesforce CPQ Summer '18 and earlier.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce CPQ editions.

How: Here are some of the most commonly used HTML tags that changed.

Old HTML Tag	New HTML Tag
<acronym>	<abbr>
	
 	<p> or <p> <p>
<i>	

Rich text fields that sales reps saved in an earlier version of Salesforce CPQ might have small differences after you save them in Winter '19. We added an alert when you first open a rich text field that you saved in an earlier CPQ version.

The new rich text editor shows some tags differently. When working with the enhanced rich text editor, here are some additional changes to keep in mind.

- Most content is wrapped in <p> instead of <div>. Rich text content that you formatted before Winter '19 is wrapped in <p> after you open and save it with the new rich text editor.
- Closing tags are removed if they're not required. For example, becomes .
- Content usually ends with <p>
</p>.

Salesforce Billing: Enhancements to Payment Gateway and Revenue Adjustments, Simplified Management for Multiple Billing Transactions, and Easier Cancellations for Order Products

Track your gateway responses, refund failed payments, and change your revenue schedule balances. Consolidate your billing transactions into a single invoice line and create a cancellation invoice plan.

 **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.

IN THIS SECTION:

[Upgrading to Salesforce Billing Winter '19](#)

Before you upgrade to Salesforce Billing Winter '19, make sure your org follows new page layout requirements.

[Payment Gateway: Tracking Gateway Responses and Refunding Failed Payments](#)

Salesforce Billing calls the payment gateway to make a payment request using a customer's bank. The gateway then responds with the results of the payment request. View the results of that request on the payment transaction object. If the gateway makes the payment but a system error prevented the gateway from responding to Salesforce Billing, you can now refund that payment in the gateway.

[Revenue Schedule: Revenue Adjustments and Revenue Amount Fields](#)

Revenue schedules store records of revenue transactions you've made against an invoice line. The schedule's revenue amount fields let you view the recognized, unrecognized, available, and deferred revenue on your schedule. You can use revenue adjustments if you need to increase or decrease your revenue schedule's available amount, or transfer it to the available amount on a different schedule. Salesforce Billing updates the schedule's revenue amount fields to reflect any of your revenue adjustments.

[Create Sub-Invoice Lines for Billing Transactions](#)

Typically, billing transactions are created from invoice plans. You can now leverage the sub-invoice line functionality for billing transactions to be consolidated into a single invoice line for the same order product across your new orders and order cancellations.

[Cancel Order Products Using Invoice Plans](#)

Admins can set up conditional invoice plans for new orders and order cancellations. To cancel order products with billing schedules and billing transactions, select a cancellation invoice plan.

Upgrading to Salesforce Billing Winter '19

Before you upgrade to Salesforce Billing Winter '19, make sure your org follows new page layout requirements.

Where: This change applies to Salesforce Classic and Lightning Experience 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.

How: We've added a default invoice plan tab. If you're already using a custom invoice plan tab, delete it before you upgrade.

As of Salesforce Billing Winter '19, payment schedulers require a value for the Payment Gateway field. If any of your recurring payment schedulers were created without payment gateway lookups before this release, they will no longer work. [Delete them and create new payment schedulers](#) with the payment gateway field populated.

Salesforce Billing Winter '19 requires the Winter '19 versions of each payment gateway.

Salesforce Billing Winter '19 added the following permission sets for each payment gateway.

- CyberSourceAdmin
- PayeezyAdmin
- PayFlowProAdmin
- AuthorizeDotNetAdmin

Apply these permission sets to your user profiles after upgrading.

Payment Gateway: Tracking Gateway Responses and Refunding Failed Payments

Salesforce Billing calls the payment gateway to make a payment request using a customer's bank. The gateway then responds with the results of the payment request. View the results of that request on the payment transaction object. If the gateway makes the payment but a system error prevented the gateway from responding to Salesforce Billing, you can now refund that payment in the gateway.

IN THIS SECTION:

[Track Payment Gateway Responses](#)

We've added the Gateway Status field to payment transactions. Even if a payment run is successful, external errors such as customer account issues or server problems can prevent the gateway from actually making the payment using the customer's bank. Gateways have many different response codes based on the type of error. Salesforce Billing now filters those response codes into one of seven gateway status values on your payment transaction.

[Refund a Failed Payment in the Gateway](#)

We've added the Attempt Refund & Unlock Invoice button to payment transactions. When communication fails between Salesforce Billing and the gateway, use this button to unlock your invoices and check whether the gateway still has a payment. If it does, Salesforce Billing refunds the payment in the gateway and unlocks your invoice so that future payment runs can attempt payment again.

Track Payment Gateway Responses

We've added the Gateway Status field to payment transactions. Even if a payment run is successful, external errors such as customer account issues or server problems can prevent the gateway from actually making the payment using the customer's bank. Gateways have many different response codes based on the type of error. Salesforce Billing now filters those response codes into one of seven gateway status values on your payment transaction.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce Billing editions.

Who: You need Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

Why: You can review the gateway status to see whether your payment request succeeded or whether the gateway couldn't make the payment. If it couldn't make the payment, you can take corrective action based on the type of response you received. For example, if the payment request failed due to an incorrect credit card number, you can update that number on your customer's payment method and attempt the payment again.

SEE ALSO:

[Salesforce Help: Managing Payment Run Results](#)

Refund a Failed Payment in the Gateway

We've added the Attempt Refund & Unlock Invoice button to payment transactions. When communication fails between Salesforce Billing and the gateway, use this button to unlock your invoices and check whether the gateway still has a payment. If it does, Salesforce Billing refunds the payment in the gateway and unlocks your invoice so that future payment runs can attempt payment again.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce Billing editions.

Who: You need Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

Why: When Salesforce Billing makes a gateway call, the gateway attempts to make a payment to the customer bank and then communicates that information to Salesforce Billing. Salesforce Billing then makes a payment record using the gateway's response information.

However, unexpected errors can interrupt Salesforce Billing's communication with the payment gateway before Salesforce Billing has a chance to make a matching payment record. In this case, Salesforce Billing can't evaluate whether the gateway actually contains a payment to the customer bank. Salesforce Billing locks related invoices until you can review whether the gateway contains the payment. If the gateway does contain the payment, this locking prevents future payment runs from picking up the invoice, making another gateway call, and potentially charging the customer twice.

You can unlock the invoice and then check whether the gateway contains a payment. If it does, the gateway refunds the payment as well. You can then proceed to attempt another payment, or leave the invoice open for future payment runs.

Revenue Schedule: Revenue Adjustments and Revenue Amount Fields

Revenue schedules store records of revenue transactions you've made against an invoice line. The schedule's revenue amount fields let you view the recognized, unrecognized, available, and deferred revenue on your schedule. You can use revenue adjustments if you need to increase or decrease your revenue schedule's available amount, or transfer it to the available amount on a different schedule. Salesforce Billing updates the schedule's revenue amount fields to reflect any of your revenue adjustments.

IN THIS SECTION:

[Revenue Amount Fields](#)

Revenue schedules now contain fields that show how much revenue has been distributed, and how much, if any, remains to be distributed. Use these fields for bookkeeping and identifying revenue schedules that require further review and distribution of revenue transactions.

[Change Revenue Schedule Available Balances with Revenue Adjustments](#)

When you want to change your initial revenue schedule, you may need to increase or decrease your revenue schedule's available amount, or transfer it to the available amount on a different schedule. You can use revenue adjustments to change your revenue schedule's available amount.

Revenue Amount Fields

Revenue schedules now contain fields that show how much revenue has been distributed, and how much, if any, remains to be distributed. Use these fields for bookkeeping and identifying revenue schedules that require further review and distribution of revenue transactions.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce Billing editions.

Who: You need Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

Why: Use these fields for bookkeeping and identifying revenue schedules that require further review and distribution of revenue transactions.

How: On the revenue schedule object, review the following fields.

Total

The total amount available when the revenue schedule is created.

Adjustments

The total of changes created through revenue adjustments to this revenue schedule.

Recognized

The sum of this revenue schedule's revenue transactions that have been recognized and distributed to closed finance periods.

Unrecognized

The sum of this revenue schedule's revenue transactions that haven't been recognized and distributed to open finance periods.

Available

The total amount on this revenue schedule, including adjustments, that hasn't been distributed to any revenue transactions.

Deferred

The total amount of revenue, plus any adjustments, that hasn't been recognized yet.

EDITIONS

Available in: Salesforce Billing Winter '19 and later

Change Revenue Schedule Available Balances with Revenue Adjustments

When you want to change your initial revenue schedule, you may need to increase or decrease your revenue schedule's available amount, or transfer it to the available amount on a different schedule. You can use revenue adjustments to change your revenue schedule's available amount.

Where: This change applies to Salesforce Classic and Lightning Experience in all Salesforce Billing editions.

Who: You need Salesforce CPQ to install Salesforce Billing. Some subscriptions offer this package for an extra cost. For pricing, contact your Salesforce account executive.

Why: Sometimes, you may need to change your revenue schedule. For example, you invoiced a three-month data plan contract assuming that your customer would use \$100 of data each month, but they used \$80 each month instead. Remember, you create the revenue schedule first and then create revenue transactions to match the schedule's total amount. This means that you have a revenue schedule with a total amount of \$300, while you received \$240 in actual revenue. To ensure that all amount changes are tracked for audits and bookkeeping, Salesforce Billing doesn't let you edit the revenue schedule's total amount directly. While you can edit revenue transaction amounts, these changes don't impact the revenue schedule's total amount. However, you can create a revenue adjustment for the total amount that you want to change on your schedule.

Revenue adjustments contain revenue adjustment lines, whose total amounts roll up to the revenue adjustment's total amount. Each revenue adjustment line has a lookup to a revenue schedule. This way, you can associate different lines with different schedules if needed. To decrease your revenue schedule's available amount by \$60, you could create a revenue adjustment with one revenue adjustment line of -\$60. When you post your revenue adjustment, it reduces your revenue schedule's available amount by \$60. The change in available amount then reduces the schedule's total amount by \$60 as well.

You can also transfer available amounts between revenue schedules. In Salesforce Billing, this means your revenue adjustment has an amount of zero. For example, you could have a revenue adjustment with a \$10 line targeting Revenue Schedule A and a -\$10 line targeting revenue schedule B. You could also have a revenue adjustment with a \$30 line targeting Revenue Schedule A, a -\$15 line targeting Revenue Schedule B, and a -\$15 line targeting revenue schedule C.

How: To get started, go to the revenue adjustment list view and click **New**. Give your adjustment a name and target revenue schedule.

The screenshot shows the 'New Revenue Adjustment' form. The form is titled 'New Revenue Adjustment' and has an 'Information' section. It contains several fields: 'Revenue Adjustment Name' (required), 'Revenue Adjustment Date' (with a calendar icon), 'Target Revenue Schedule' (with a search bar), 'Type' (dropdown menu set to 'Adjustment'), 'Status' (dropdown menu set to 'Draft'), and 'Notes' (text area). At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

To create revenue adjustment lines, go to your revenue adjustment's Revenue Adjustment Line related list and click **New**.

New Revenue Adjustment Line

Information

<p>* Revenue Adjustment Line Name <input type="text"/></p> <p>* Revenue Adjustment <input type="text" value="Test"/></p> <p>* Adjustment Amount <input type="text"/></p> <p>* Target Revenue Schedule <input type="text" value="Search Revenue Schedules..."/></p> <p>Account <input type="text" value="Search Accounts..."/></p> <p>Legal Entity <input type="text" value="Search Legal Entities..."/></p>	<p>Revenue Adjustment Date <input type="text"/></p> <p>Type <input type="text" value="Adjustment"/></p> <p>Status <input type="text" value="Draft"/></p> <p>Finance Book <input type="text" value="Search Finance Books..."/></p> <p>Finance Period <input type="text" value="Search Finance Periods..."/></p> <p>GL Rule <input type="text" value="Search GL Rules..."/></p> <p>GL Treatment <input type="text" value="Search GL Treatments..."/></p>
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SEE ALSO:

[Salesforce Help: Revenue Adjustments](#)

Create Sub-Invoice Lines for Billing Transactions

Typically, billing transactions are created from invoice plans. You can now leverage the sub-invoice line functionality for billing transactions to be consolidated into a single invoice line for the same order product across your new orders and order cancellations.

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce Billing editions.

Cancel Order Products Using Invoice Plans

Admins can set up conditional invoice plans for new orders and order cancellations. To cancel order products with billing schedules and billing transactions, select a cancellation invoice plan.

Where: This change applies to Lightning Experience and Salesforce Classic in all Salesforce Billing editions.

Pardot: Lightning Experience, Easier Opt-In, Engagement Program Conversion, Campaign Member Sync, and More Goodies

Pardot in Lightning Experience is generally available! New settings let you opt in synced prospects easily. Engagement Studio makes it a snap to convert programs to allow prospect reentry and offers date filters for stats. Sync prospects straight to Salesforce as campaign members, and look for some spiffed up dashboards around the product. The latest version of Lightning Design System brings minor UI changes to Pardot.

IN THIS SECTION:

[Align Sales and Marketing on a Single Platform with Pardot in Lightning Experience \(Generally Available\)](#)

Pardot in Lightning Experience helps your 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 managing duplicated menus with confusing navigation. The app has all-new navigation and layout tailored for Lightning Experience.

[Easily Opt In Opted-Out Prospects Synced to Salesforce](#)

Easily opt synced prospects back into Pardot emails. Previously, if the Prospect opted out field was selected, you couldn't opt a synced prospect back into Pardot emails without a fight. You had to unverify the Salesforce-Pardot connector or try to update the records in both systems simultaneously. Now, Pardot admins can change this field's sync behavior to allow users to overwrite a prospect's opt-out status to make them mailable again. Users can opt in to 100 prospects per day, per account.

[Convert Engagement Programs to Allow Repeat \(Beta\)](#)

Turn a successful engagement program into a powerhouse by adding the program reentry setting. Join this continuing beta to see what happens when you give prospects a second chance on an Engagement Studio program.

[Filter Engagement Studio Canvas by Date](#)

See how your program performed during a particular period. As always, you see quick stats for each step of the program. To view complete data again, select the **All Time** filter.

[B2B Marketing Analytics Dashboards Changed](#)

We updated a few things on the B2B Marketing Analytics dashboards so that you get the right information when you need it. The Account-Based Marketing dashboard now excludes Pardot opportunities that aren't synced to a Salesforce opportunity or account. More descriptive labels and formula updates appear in the Pipeline and Multi-Touch Attribution dashboards.

[Create Salesforce Campaign Members from Prospects](#)

Along with Connected Campaigns, prospects associated with Pardot campaigns can now sync to connected Salesforce campaigns as campaign members. Turn on both Connected Campaigns and Member Sync to find Pardot-sourced prospects (first touch) in your Salesforce campaigns. When you turn them into contacts, we tell you which campaign influenced the deal.

[Pardot UI Gets a Mini-Makeover](#)

We updated the Pardot user interface to the most recent version of Salesforce Lightning Design System (SLDS). This update changed the UI. The biggest change is that notification alerts have changed from blue to gray. There are also minor changes, such as slightly darker shades of gray, and bolder page headers.

[Use Engage for Gmail Extension with the New Gmail UI](#)

The Engage for Gmail extension now supports the new Gmail UI.

[Enable Operational Email](#)

Admins can now enable operational emails in their Pardot accounts. This feature allows admins to bypass email marketing opt-in for a specific set of email sends.

[Run a Full Sync Without Contacting Pardot Support](#)

Creating a custom prospect field used to mean that you had to contact support to trigger a full sync to update the field values for prospects. Now, an admin can queue all prospects for sync after saving a new custom field.

[Let Prospects Repeat Engagement Programs](#)

Engagement program reentry settings are now generally available. Use them to allow prospects to flow through the program as many times as you want.

[Copy and Paste to Build Engagement Programs](#)

Tired of creating engagement programs one step at a time? Try new copy and paste tools that help you reuse patterns of steps to quickly build complex canvases. Enter Select mode, choose up to 10 steps, and paste them somewhere else in the canvas. Repeat as needed!

[Notification Banner Permission Changes](#)

We've changed which notification banners that users with default roles can see in Pardot. We've also added custom role permissions to help you manage what your users with custom roles can see.

[Bot Clicks Filtered from Pardot Actions and Reports](#)

By default, Pardot now ignores clicks from certain IP ranges that are associated with email security scanners. Although we collect all clicks and click-through data, the new defaults remove scanner activity from reports. Activity from these IP ranges also is no longer used to fire completion actions, scores, or triggers. The setting can be changed.

[Send Engage Campaigns from More Places](#)

Salesforce Engage users can send Engage Campaigns to campaign members and opportunity contacts without leaving the record pages. They can also send a targeted one-to-many email to contact roles in a group of opportunities from an opportunity list view.

[UI Improvements in the Pardot Lightning App](#)

We're introducing UI and performance improvements to the Prospects page in the Pardot Lightning app. Pagination has been replaced with infinite scroll. We've made styling tweaks, moved buttons and the mass action menu, and made the view menu more intuitive.

[View Sent Automated Emails](#)

Pardot offers automated email types that fire behind the scenes, and sometimes you want to verify that a certain email was sent. An option to view sent automated emails is now available in the Sent Emails view dropdown menu. It shows you all emails that were sent based on automation rules, completion actions, and engagement program email sends. You can also open reports from this view.

Align Sales and Marketing on a Single Platform with Pardot in Lightning Experience (Generally Available)

Pardot in Lightning Experience helps your 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 managing 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.

Who: This feature is available to Salesforce users with the Allow Access to All Pardot Features permission who are synced to a Pardot user.

The screenshot displays the Pardot Dynamic Content interface. The left sidebar shows navigation options like Forms, Dynamic Content, Files, Folders, Tags, and Social. The main content area is titled 'Dynamic Content' and includes a 'Date Range' dropdown set to 'All Time', an '+ Add Dynamic Content' button, and a 'Tools' dropdown. Below this is a table with the following data:

NAME	FIELD	VARIATIONS	UPDATED AT	ACTIONS
<input type="checkbox"/> Email: Region Focus <small>/ / Email Campaigns</small>	Default Field: State	9	Aug 15, 2018 4:18 PM	
<input type="checkbox"/> Email: Title Focus <small>/ / Email Campaigns</small>	Default Field: Job Title	4	Jul 23, 2018 9:45 AM	
<input type="checkbox"/> Web: Industry Focus <small>/ / Website</small>	Default Field: Industry	6	Aug 8, 2018 11:05 AM	
<input type="checkbox"/> Web: Persona Focus <small>/ / Website</small>	Default Field: Department	5	May 10, 2018 3:20 PM	
<input type="checkbox"/> Web: Regional Event Promotion <small>/ / Website</small>	Default Field: Country	4	Aug 14, 2018 1:41 PM	

At the bottom of the table, there is a 'With 0 selected:' dropdown, a 'Go' button, and pagination information: 'Showing 5 of 11 Page 1 of 3 Next'.

SEE ALSO:

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

Easily Opt In Opted-Out Prospects Synced to Salesforce

Easily opt synced prospects back into Pardot emails. Previously, if the Prospect opted out field was selected, you couldn't opt a synced prospect back into Pardot emails without a fight. You had to unverify the Salesforce-Pardot connector or try to update the records in both systems simultaneously. Now, Pardot admins can change this field's sync behavior to allow users to overwrite a prospect's opt-out status to make them mailable again. Users can opt in up to 100 prospects per day, per account.

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

Who: Pardot admins enable this setting. Pardot admins and users with the Toggle Opt-in Status permission can opt prospects back in from Pardot. In Salesforce, users with the appropriate field-level permissions can opt in leads and contacts.

How: In Pardot, edit your Salesforce connector, and select **Overwrite Prospect Opted Out field**. Accept the terms, and then save your connector.

 **Note:** Make sure that your users follow the [Pardot Permission Based Marketing Policy](#) and applicable marketing and privacy laws when using this feature to opt in prospects.

SEE ALSO:

[Salesforce Help: Prospect Opted Out Field and Sync Behavior \(can be outdated or unavailable during release preview\)](#)

Convert Engagement Programs to Allow Repeat (Beta)

Turn a successful engagement program into a powerhouse by adding the program reentry setting. Join this continuing beta to see what happens when you give prospects a second chance on an Engagement Studio program.

Where: This change applies to all Pardot editions.

 **Note:** As a beta feature, repeating programs are a preview and aren'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 for 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 repeating programs in the [IdeaExchange](#). To enable this feature in your account, turn it on from Engagement Studio or contact the support team.

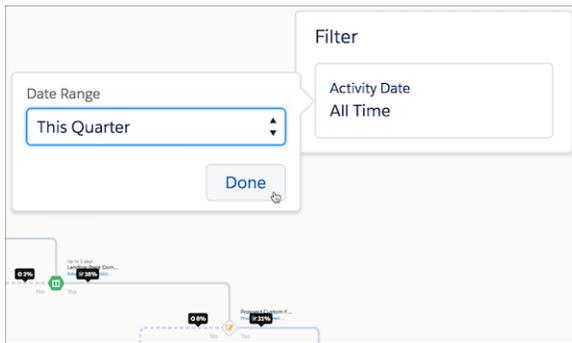
Who: Pardot Administrator and Marketing roles and users with the Create permission in Engagement Studio.

How: On the Start card of an engagement program, select **Allow prospects to enter program more than once**. Choose how many times a prospect can travel through your program and how long before starting again.

Filter Engagement Studio Canvas by Date

See how your program performed during a particular period. As always, you see quick stats for each step of the program. To view complete data again, select the **All Time** filter.

Where: This change is available in all Pardot editions.



B2B Marketing Analytics Dashboards Changed

We updated a few things on the B2B Marketing Analytics dashboards so that you get the right information when you need it. The Account-Based Marketing dashboard now excludes Pardot opportunities that aren't synced to a Salesforce opportunity or account. More descriptive labels and formula updates appear in the Pipeline and Multi-Touch Attribution dashboards.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions with Pardot Plus and Advanced Editions.

Why: The Pipeline Dashboard includes these changes.

- Conversion Rate formula is (# of Won Opportunities) / (Total Visitors). This value respects the selected date range.
- Campaign Cost includes only costs for campaigns that are associated with the displayed opportunities.
- The labels Lifecycle Snapshot and Values: SQLs, Won, and Lost more accurately represent what is shown.

Pipeline and Multi-Touch Attribution dashboards show these changes.

- The ROI formula is $[(\$Revenue - \$Cost) / \$Cost] * 100$.
- When you view filtered or faceted opportunities, only associated campaigns are used in the ROI calculation.

Create Salesforce Campaign Members from Prospects

Along with Connected Campaigns, prospects associated with Pardot campaigns can now sync to connected Salesforce campaigns as campaign members. Turn on both Connected Campaigns and Member Sync to find Pardot-sourced prospects (first touch) in your Salesforce campaigns. When you turn them into contacts, we tell you which campaign influenced the deal.

Where: This change is available in all Pardot editions.

Who: Pardot admins using a connected Salesforce account.

How: After you turn on Connected Campaigns, return to your Pardot account settings. On the Edit page, select **Enable Campaign Member Sync**, save, and wait for all that precious data to show up in Salesforce.

Pardot UI Gets a Mini-Makeover

We updated the Pardot user interface to the most recent version of Salesforce Lightning Design System (SLDS). This update changed the UI. The biggest change is that notification alerts have changed from blue to gray. There are also minor changes, such as slightly darker shades of gray, and bolder page headers.

Where: This change applies to all editions of Pardot.

SEE ALSO:

[External Site: Lightning Design System](#)

Use Engage for Gmail Extension with the New Gmail UI

The Engage for Gmail extension now supports the new Gmail UI.

Where: This change applies to all Pardot accounts with Salesforce Engage.

When: This change is effective October 1, 2018.

How: If you switched to Gmail's new UI, Engage for Gmail was disabled. Re-enable the extension by navigating to `chrome://extensions/` in your Chrome browser. Find Engage for Gmail, and turn it on.

Enable Operational Email

Admins can now enable operational emails in their Pardot accounts. This feature allows admins to bypass email marketing opt-in for a specific set of email sends.

Where: All Pardot Editions

Why: You no longer have to contact Support to turn on this option. Simply enable it in your account settings.

SEE ALSO:

[Salesforce Help: Sending Non-Marketing Emails \(can be outdated or unavailable during release preview\)](#)

Run a Full Sync Without Contacting Pardot Support

Creating a custom prospect field used to mean that you had to contact support to trigger a full sync to update the field values for prospects. Now, an admin can queue all prospects for sync after saving a new custom field.

Where: This change applies to all Pardot accounts with fewer than 500,000 prospects.

Who: Admins and users with permissions to create custom fields can start a full sync.

How: When you save a new custom field in Pardot, you're prompted to queue all prospects for sync. During a full sync, other prospect data syncing is slowed. If you create multiple custom fields at once, wait until you create the final field to sync.

Let Prospects Repeat Engagement Programs

Engagement program reentry settings are now generally available. Use them to allow prospects to flow through the program as many times as you want.

Where: All Pardot Editions

Copy and Paste to Build Engagement Programs

Tired of creating engagement programs one step at a time? Try new copy and paste tools that help you reuse patterns of steps to quickly build complex canvases. Enter Select mode, choose up to 10 steps, and paste them somewhere else in the canvas. Repeat as needed!

Notification Banner Permission Changes

We've changed which notification banners that users with default roles can see in Pardot. We've also added custom role permissions to help you manage what your users with custom roles can see.

Where: The default user permissions change applies to all Pardot editions. Custom role permissions are available in Pardot accounts with custom roles.

When: These changes are available after December 5, 2018.

Why: Now users can see notification banners for their default user role and all of the roles below it.

- Admins can see banners for Admin, Marketing, Sales Manager, and Sales user roles.
- Marketing users can see banners for Marketing, Sales Manager, and Sales user roles.
- Sales Managers can see banners for Sales Manager and Sales user roles.
- Sales users can see banners for the Sales user role.

How: The change to default roles doesn't require any action on your part. Users with custom roles can't see banner notifications unless an admin adds the permissions to their roles. Adjust permissions from the Notification Banner module in the Admin tab of the custom roles editor.

SEE ALSO:

[Salesforce Help: Custom User Roles \(can be outdated or unavailable during release preview\)](#)

Bot Clicks Filtered from Pardot Actions and Reports

By default, Pardot now ignores clicks from certain IP ranges that are associated with email security scanners. Although we collect all clicks and click-through data, the new defaults remove scanner activity from reports. Activity from these IP ranges also is no longer used to fire completion actions, scores, or triggers. The setting can be changed.

Where: All Pardot Editions

How: To change the default behavior and allow bot clicks to trigger activity and appear in reports, navigate to **Admin > Automation Settings > Visitor Filters**. Remove entries that begin with the prefix [PD-SYS].

Send Engage Campaigns from More Places

Salesforce Engage users can send Engage Campaigns to campaign members and opportunity contacts without leaving the record pages. They can also send a targeted one-to-many email to contact roles in a group of opportunities from an opportunity list view.

Where: This feature is new in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions with any version of Pardot with Salesforce Engage. The ability to send from campaign record pages is also available in Developer editions.

When: This feature is available starting December 12, 2018.

Who: To use the Send Engage Email button, users need a Salesforce Engage license and a Sales Cloud or CRM license.

How: Add the Send Engage Email button to your opportunity list views and your opportunity and campaign page layouts.

SEE ALSO:

[Salesforce Help: Add Send Engage Email Button \(can be outdated or unavailable during release preview\)](#)

UI Improvements in the Pardot Lightning App

We're introducing UI and performance improvements to the Prospects page in the Pardot Lightning app. Pagination has been replaced with infinite scroll. We've made styling tweaks, moved buttons and the mass action menu, and made the view menu more intuitive.

Where: This change applies to the Pardot Lightning app.

When: December 14, 2018

Why: This update aligns the Pardot Lightning app look and feel more closely with Salesforce.

NAME	COMPANY	SCORE	GRADE	LAST AC
Verna Paucak	Bednar, Mraz and Farrell	169	B	November 26, 2018 11:25 PM
George Makris	Golden Ratio Woodworks Inc	542	A+	November 26, 2018 11:24 PM
Easton Watsica	Franecki PLC	139	C+	November 26, 2018 11:24 PM
Erik Zieme	Mitchell, McGlynn and Beer	96	A+	November 26, 2018 11:24 PM
Justine Monahan	Krajcik Ltd	6777	B-	November 26, 2018 11:24 PM
Jaylen Romaguera	Schulist, Erdman and Torphy	106	B+	November 26, 2018 11:24 PM
Tom Propp	Fleetwood Gaming Inc	748	C-	November 26, 2018 11:25 PM
Klarna Prohaska	Langosh-White	123	B	November 26, 2018 11:24 PM
Ms. Sarah Jeffries	Tyconet	533	B+	November 26, 2018 11:16 PM
Randal Ledner	Blins-Quiltzon	177	C-	November 26, 2018 11:14 PM
Wade Rosenbaum	Kihn and Sons	151	A	November 26, 2018 11:13 PM
Sanford Wiegand	Johnson Ltd	242	C+	November 26, 2018 11:13 PM
Megan Salyer	Neville Homes	302	A	November 26, 2018 11:13 PM
Darwin Ashford	Wyntfrey Hotel	588	B+	November 26, 2018 11:12 PM
Alexandrea Herman	Lehner Group	118	A	November 26, 2018 11:07 PM
Shayna Brekke	Kihn, Hermann and Crist	86	C+	November 26, 2018 11:06 PM

View Sent Automated Emails

Pardot offers automated email types that fire behind the scenes, and sometimes you want to verify that a certain email was sent. An option to view sent automated emails is now available in the Sent Emails view dropdown menu. It shows you all emails that were sent based on automation rules, completion actions, and engagement program email sends. You can also open reports from this view.

Where: This changes applies to Lightning Experience and all Pardot editions.

When: December 14, 2018

Service: Text Messaging and Facebook Messenger Support with LiveMessage, Help Center for Small Businesses, and Field Service Dispatching in Lightning Communities

Enjoy a cornucopia of new features to help bring your customer service to the next level. LiveMessage in Lightning Experience lets you engage with customers on top messaging channels from the Lightning Service Console. With Help Center, create a help site to share Knowledge articles and let customers log cases for issues that require human intervention. In Lightning Flow for Service, view completed steps in the Guided Action History and alert agents to required steps. Share dispatching responsibility with your field service contractors by giving them access to the dispatcher console from a community. Finally, power your Einstein bots to do more for your customers with process automation flows.

IN THIS SECTION:

[Einstein Bots: Process Automation Flows, Improved Flexibility, and More Detailed Session Logs](#)

Einstein Bots support your agents and delight your customers. Improve the usefulness of your bots by adding automated business processes, known as flows, to your dialogs. Analyze detailed session logs to smooth out the wrinkles and improve your bot's interactions with customers. To give bots more flexibility, we renamed slots to variables, which no longer require an associated entity. And all Einstein Bot versions now share a single bot intent set.

[Channels: Text, Facebook, and YouTube Support Channels, Einstein Bot Support in Mobile Apps, and More](#)

LiveMessage in Lightning Experience makes it easy and convenient for customers to get support when they need it using text messaging and Facebook Messenger. Bring comments on your YouTube channel into Salesforce with Social Customer Service so that support agents can provide timely solutions to customer issues. Incorporate Einstein Bots into your native mobile apps on iOS and Android with the Snap-ins for Mobile Apps SDK. Customize labels for your Snap-ins Chat deployments, and create a Snippet Settings File to use code snippet settings into your Communities snap-ins. Open CTI comes to Service Essentials, and softphones can now be bigger. Email-to-Case attachments are automatically turned to Salesforce Files, so you can conveniently preview them and share them across the org. The compact case feed appears wherever case or social feeds appear in Lightning Experience.

[Field Service: Step-by-Step Job Guidance, Service Report Enhancements, and Dispatch Console in Communities](#)

Develop easy-to-navigate lists of tasks to guide your team through their work in the field. Enjoy new options on service reports, including the ability to select the language. Help dispatchers schedule more efficiently by creating custom Gantt color palettes and sharing the dispatching duties with Lightning community users.

[Case Management: Omni-Channel Skills-Based Routing, Copy and Paste for Images, and Folders for Macros and Quick Text](#)

Use Omni-Channel skills-based and queue-based routing together for a robust solution to assign work items to agents. And after your agents receive a work item, they have more tools to help them close the case. Agents can copy and paste images directly into case emails. And folders help them organize and share macros and quick text more easily.

[Service Cloud for Mobile: Localization and Chatter Mentions](#)

Android and iOS versions of Service Cloud Mobile update to version 1.1.0. This update brings localization to match the default language in your org and improvements to Chatter mentions. And the Android version catches up with the iOS version, with support for quick actions based on object page layouts and the file picker for posting Salesforce Files in the case feed.

[Knowledge: Expanded Features for Lightning Knowledge and More Options to Manage Articles](#)

More Salesforce Classic features have expanded to Lightning Knowledge. Do more from the Articles related list on cases, get more done on article list views, and customize articles with actions, buttons, and links. In addition, customize global search for Knowledge data, add lookup fields to article versions, import articles with translations, and migrate more to Lightning Knowledge.

[Setup Flows: Bring Your Service to the Next Level](#)

Our guided setup flows make it easy to get started with more service features, letting you continue to provide your customers with stellar support. There are new setup flows for LiveMessage and Help Center that you can access depending on your edition. There are some updates to the Email-to-Case and Lightning Communities setup flows.

Einstein Bots: Process Automation Flows, Improved Flexibility, and More Detailed Session Logs

Einstein Bots support your agents and delight your customers. Improve the usefulness of your bots by adding automated business processes, known as flows, to your dialogs. Analyze detailed session logs to smooth out the wrinkles and improve your bot's interactions with customers. To give bots more flexibility, we renamed slots to variables, which no longer require an associated entity. And all Einstein Bot versions now share a single bot intent set.

IN THIS SECTION:

[Supercharge Your Bot with Autolaunched Flows—No Coding Required](#)

Bring your automated processes to Einstein Bots. Call autolaunched flows from your bot dialogs. Open a case, update a contact, or trigger a journey, right in the chat conversation.

[Analyze Einstein Bots Sessions Easily and More Deeply](#)

Session logs record the details of your bot for a given session. Use the logs when building your bot to confirm the steps. And before you put your bot to work, event tracking helps you debug the interaction design.

[Define Bot Question Elements Differently with Slots Renamed to Variables](#)

For greater flexibility in how Einstein Bots gather, manage, and store data, slots are renamed variables and no longer require an associated entity. Don't worry—you don't have to update your current bots. For existing bots, we handle the change for you. For new bots, you use a slightly different process to create Question elements that gather customer data.

[Train Bots More Easily with a Unified Intent Set Across All Bot Versions](#)

All Einstein Bot versions now share a single bot intent set. To add customer inputs, you previously had to update the intents for each bot version. Now with unified intents, each bot version learns from the unified intent set. If you currently have multiple bot versions, we moved them into standalone bots. New versions share an intent set.

[Build Intents Quickly by Adding Customer Inputs with the Data Loader](#)

If you use dialog intents to understand what your customers want, you need at least 150 inputs to build an effective intent model. Adding all these customer inputs manually is tedious and time consuming. One way to add customer inputs more quickly is with the Data Loader.

[Understand Your Customers More Quickly—Einstein Bots Support Literal Matches](#)

It takes effort to identify all the different ways customers ask for help. You expect your bot to understand every variation that you add to your dialog intents. With literal matching, your Einstein bot looks for an exact match for what the customer types in chat. If the bot finds the precise customer input in a dialog intent, it launches the corresponding dialog.

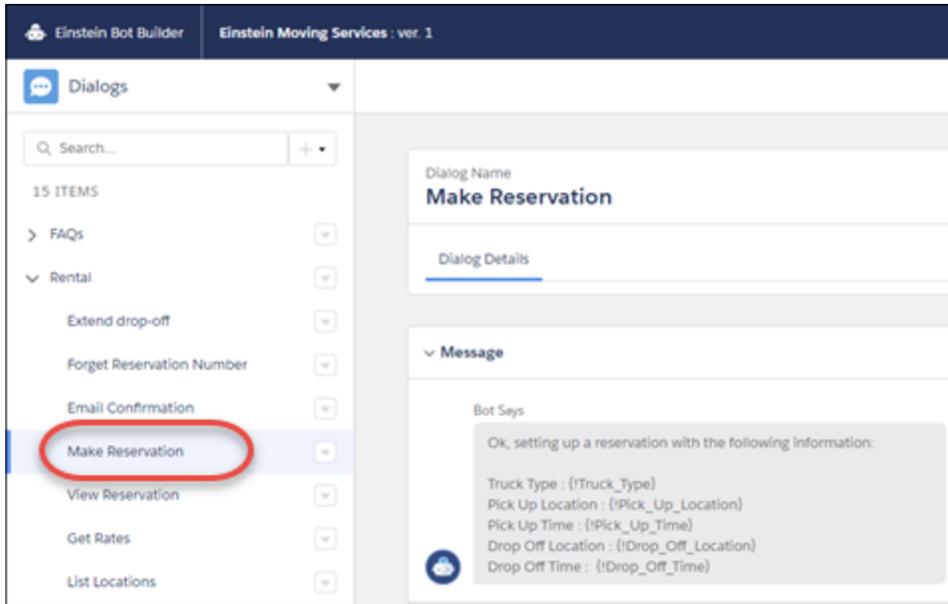
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Where: This change applies to both Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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: You can configure it all with clicks, not code. In the Einstein Bot Builder menu, choose the dialog that you want to contain the flow.



Add an Action dialog element. Set the Action Type to **Flow**, and enter the action name of the flow that you created in the Cloud Flow Designer.

 **Note:** In the Cloud Flow Designer, set the flow type to **Autolaunched Flow**.

Define the inputs for the flow, and set the variable to store the output.

▼ Action + ×

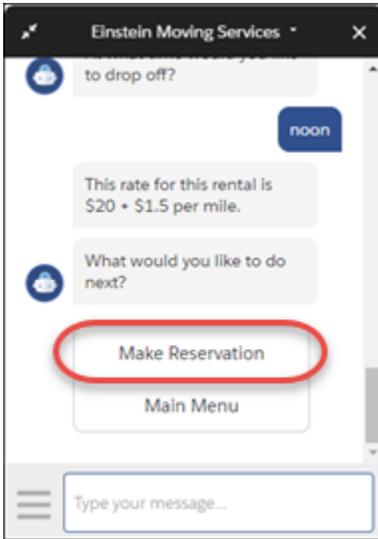
* Action Type
Flow ▼

* Action Name
▶ Make Rental Reservation ×

Input	Source	Variable Name
CustomerName (string)	Varia ▼	Customer Na... ×
CustomerPhoneNumber (string)	Varia ▼	Customer Ph... ×
DropOffLocation (string)	Varia ▼	Drop Off Loc... ×
DropOffTime (datetime)	Varia ▼	Search Variables... 🔍
PickUpDateTime (datetime)	Varia ▼	Search Variables... 🔍
PickUpLocation (string)	Varia ▼	Pick Up Locat... ×

Output	Variable Name
ReservationNumber (string)	Reservation Number (Text) ×

To test the flow, preview the bot.



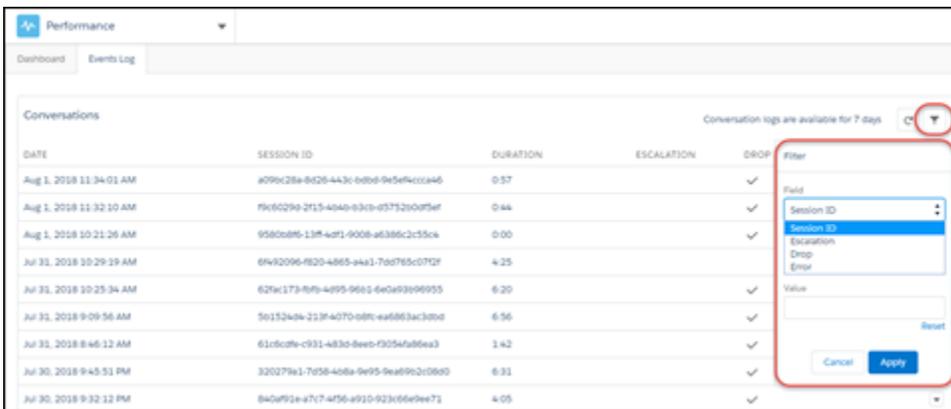
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How: On the Performance page, click **Session Log** to view your bot sessions. Click a particular session to view more details. Use a filter to sort the list as needed.



To view more about a particular session or step, select **Action > Detail**.

The screenshot shows the configuration for a question in the Einstein Bot builder. At the top, there's a 'Question' header with a dropdown arrow and a close button. Below that, the 'Bot Asks' section shows a speech bubble with the text 'What is your name?'. The 'Check for Entity' section is highlighted with a red oval and contains two entity selection boxes: 'Person (Text)' and 'Customer Name (Text)'. To the right of these is a 'Save Answer to Variable' section with a red asterisk and a dropdown menu showing 'Customer Name (Text)'. Below the entity selection, there are radio buttons for 'Static' (selected) and 'Dynamic', and an 'Add Choice' button. At the bottom, there's a 'Display Options As' dropdown menu set to 'Buttons' and a checkbox for 'Recognize and save the answer from customer input'.

Train Bots More Easily with a Unified Intent Set Across All Bot Versions

All Einstein Bot versions now share a single bot intent set. To add customer inputs, you previously had to update the intents for each bot version. Now with unified intents, each bot version learns from the unified intent set. If you currently have multiple bot versions, we moved them into standalone bots. New versions share an intent set.

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Build Intents Quickly by Adding Customer Inputs with the Data Loader

If you use dialog intents to understand what your customers want, you need at least 150 inputs to build an effective intent model. Adding all these customer inputs manually is tedious and time consuming. One way to add customer inputs more quickly is with the Data Loader.

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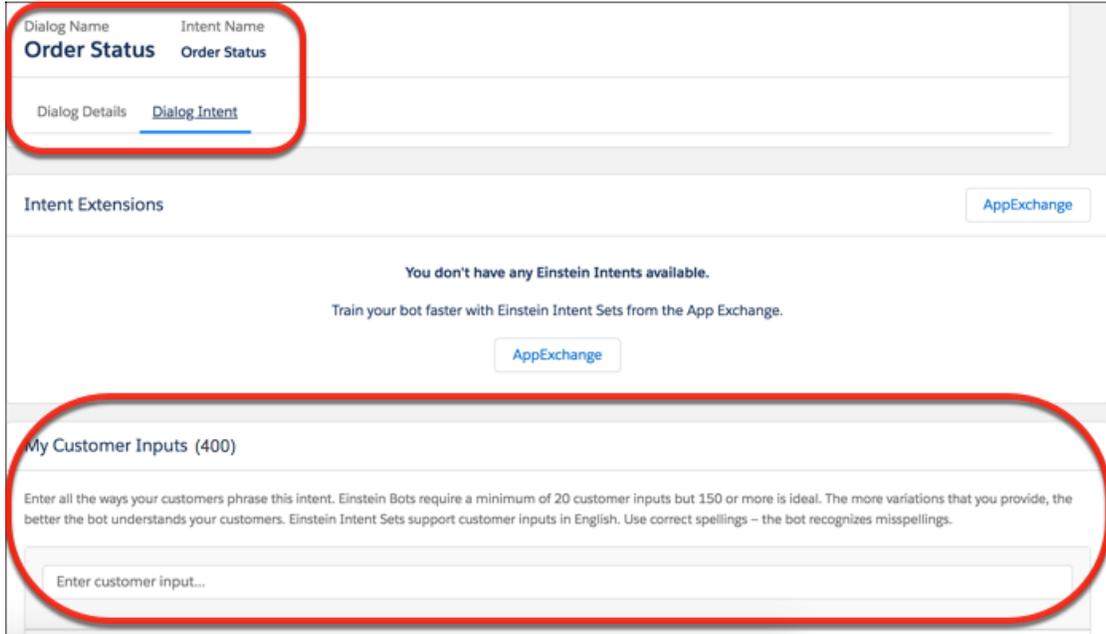
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How: In the Einstein Bot builder, create the dialogs that use the intents that include your customer inputs. Enable the dialog intent for each dialog.

The screenshot shows the configuration for a dialog in the Einstein Bot builder. The 'Dialog Name' is 'Order Status'. Below the name, there's a section for 'Dialog Details'. A red oval highlights the 'Enable Dialog Intent' button in the top right corner.

Add your customer inputs to a CSV file, and use the Data Loader to upload it.

Your uploaded customer inputs appear in the dialog intent.



SEE ALSO:

[Data Loader](#)

Understand Your Customers More Quickly—Einstein Bots Support Literal Matches

It takes effort to identify all the different ways customers ask for help. You expect your bot to understand every variation that you add to your dialog intents. With literal matching, your Einstein bot looks for an exact match for what the customer types in chat. If the bot finds the precise customer input in a dialog intent, it launches the corresponding dialog.

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How: Literal matching applies when the bot is waiting for a customer response, not when it is gathering information.

Channels: Text, Facebook, and YouTube Support Channels, Einstein Bot Support in Mobile Apps, and More

LiveMessage in Lightning Experience makes it easy and convenient for customers to get support when they need it using text messaging and Facebook Messenger. Bring comments on your YouTube channel into Salesforce with Social Customer Service so that support agents can provide timely solutions to customer issues. Incorporate Einstein Bots into your native mobile apps on iOS and Android with the Snap-ins for Mobile Apps SDK. Customize labels for your Snap-ins Chat deployments, and create a Snippet Settings File to use code snippet settings into your Communities snap-ins. Open CTI comes to Service Essentials, and softphones can now be bigger. Email-to-Case attachments are automatically turned to Salesforce Files, so you can conveniently preview them and share them across the org. The compact case feed appears wherever case or social feeds appear in Lightning Experience.

IN THIS SECTION:

[LiveMessage: Text Messaging and Facebook Messenger Support Generally Available](#)

Support your customers on the digital channels they love. LiveMessage in Lightning Experience makes it easy and convenient for customers to get support when they need it using text messaging and Facebook Messenger. Agents can work seamlessly across channels in the Service Console that they are already familiar with.

[Help Center: Simple Self-Service](#)

Create a help center that lets your customers help themselves. Display Knowledge articles that answer common questions, and provide a contact button so they can log a case for the issues that require human intervention. Use the new guided setup flow in the Essentials edition to set it up in a few minutes, and manage your help centers from the new Help Center page in Setup.

[CTI: Call Centers in Service Essentials and More Flexible Softphones](#)

Essentials Edition orgs gain the power of computer telephony integration (CTI). And Call Centers get more flexible with increased height and width limits on softphones.

[Live Agent: More Setup Options in Lightning Experience, Support for Skills-Based Routing for Chats \(Beta\), and a Faster Way to Add Quick Text](#)

Access Live Agent setup pages in Lightning Experience, and customize the Live Agent Session record page in the Lightning App Builder. Use Omni-Channel skills-based routing to route Live Agent chats. Agents can use the Quick Text button to add predefined text snippets to chats faster.

[Snap-Ins Chat: Custom Labels, Snippet Settings File for Communities, and Chatting Across Tabs](#)

Set your own labels in your snap-in for each of your Snap-ins deployments. Create a snippet settings file to include snippet-only customizations in your Communities snap-ins. Customers can take their chat across multiple tabs and windows, so they don't lose their chat while they browse your website. Also, get chat event notifications and utilize Live Agent improvements.

[Snap-Ins for Mobile Apps: Use Einstein Bots in Your Native App](#)

The Snap-ins SDK for iOS and Android includes Einstein bot support to complement the chat experience and to keep your agents and customers happy. We also made some general enhancements to the SDK.

[Social Customer Service: YouTube, Emojis, Quick Text, and Public Cloud](#)

Bring another social network into your social service arsenal: YouTube. Communicate without creating a case. Enhance your agent's experience with emojis, take Facebook public posts private, and quick text. Plus, take advantage of the compact feed, Public Cloud support, fewer necessary permissions, and an upgraded managed package.

LiveMessage: Text Messaging and Facebook Messenger Support Generally Available

Support your customers on the digital channels they love. LiveMessage in Lightning Experience makes it easy and convenient for customers to get support when they need it using text messaging and Facebook Messenger. Agents can work seamlessly across channels in the Service Console that they are already familiar with.

IN THIS SECTION:

[Support Your Customers with Text Messaging and Facebook Messenger](#)

Customers can use text messages and Facebook Messenger to conveniently contact your support center to get their issues resolved. Agents can use LiveMessage to respond from the Lightning Service Console, so they can support customers while having all the benefits and information of Service Cloud at their fingertips. Use the guided flow to set up messaging.

[Set Up LiveMessage with a Guided Setup Flow](#)

Give your customers a convenient way to communicate by adding SMS text messaging and Facebook Messenger to your support channels. Use the LiveMessage guided setup flow to get started. You can choose which channels to add and whether to set up Omni-Channel to route incoming messages to your support team.

[Set Customer Expectations with Automated Response Messages](#)

Use predefined automated responses to set the tone for your agents' conversations with customers. The Chat Acknowledgment message is sent in reply to a customer's initial text message and assures customers that their messages got through. Send automated messages when agents accept and end messaging sessions, when customers consent to receiving messages from your company, and when they revoke consent.

[Customize Automated SMS Opt-In and Opt-Out Messages](#)

When a customer sends an SMS text message to your company, LiveMessage replies with an automated message confirming that the customer consents to communicating by SMS. Customers can choose to opt in to receive messages or opt out by replying with a keyword, such as "STOP." LiveMessage then sends an automated message that acknowledges the customer's preference. Salesforce provides default text for the opt-in and opt-out messages, and you can customize them to better suit your company's branding and tone.

[Keep Customers in the Know with Automatic Text Message Notifications](#)

Use LiveMessage to automatically send SMS text message notifications to customers based on certain events. Personalize the message by inserting merge fields to fill in variables such as the customer's name or the case status. You can also use Process Builder to define a process that sends the message when certain criteria are met. For example, you can create a process that texts the customer when the status field on the customer's case changes.

[Send and Receive Images and File Attachments with SMS Text Messaging and Facebook Messenger](#)

They say that a picture is worth a thousand words. Agents and customers can get straight to the point by sending images and files in an SMS message and Facebook Messenger.

SEE ALSO:

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

[Salesforce Help: Set Up LiveMessage Channels \(can be outdated or unavailable during release preview\)](#)

Support Your Customers with Text Messaging and Facebook Messenger

Customers can use text messages and Facebook Messenger to conveniently contact your support center to get their issues resolved. Agents can use LiveMessage to respond from the Lightning Service Console, so they can support customers while having all the benefits and information of Service Cloud at their fingertips. Use the guided flow to set up messaging.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: To exchange messages with customers, users need the Service Cloud license, LiveMessage User permission set license, and View Setup and Configuration permission. To set up LiveMessage, users need the Configure LiveMessage permission and the View Setup and Configuration permission.

How: To add text message channels and Facebook Messenger channels in LiveMessage, go to Setup, enter *LiveMessage* in the Quick Find box, and select **LiveMessage Settings**. Click **New Channel** to open the guided setup flow and set up your channel.

SEE ALSO:

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

[Salesforce Help: Set Up LiveMessage Channels \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Communicate with Customers in LiveMessage \(can be outdated or unavailable during release preview\)](#)

Set Up LiveMessage with a Guided Setup Flow

Give your customers a convenient way to communicate by adding SMS text messaging and Facebook Messenger to your support channels. Use the LiveMessage guided setup flow to get started. You can choose which channels to add and whether to set up Omni-Channel to route incoming messages to your support team.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: Users with the System Administrator profile can run this setup flow. To run the flow, the org must have the Service Desk and LiveMessage permissions. There must be available LiveMessage permission set licenses and Service Cloud User licenses in order to assign users to a queue if one is created during the flow.

How: From a Lightning Experience app, click the gear icon, and select **Service Setup**. If you don't see the LiveMessage setup flow tile in Recommended Setup, click **View All**. Select **LiveMessage Setup**.

Alternatively, go to Setup, enter *LiveMessage* in the Quick Find box, and select **LiveMessage Settings**. Click **New Channel** to open the guided setup flow and set up your channel.

Set Up LiveMessage

Get the conversation rolling

Give your customers more ways to connect with you. LiveMessage lets customers contact you via conversation channels, so your customers can reach you in the way most convenient for them.



We'll help you get up and running. Here's what you'll do:

1. Turn on LiveMessage
2. Set up a conversation channel
3. Personalize LiveMessage for your customers
4. Connect to an existing Omni-Channel queue or create a new one

[Start](#)

When you set up SMS, we provide the steps for sending Salesforce a letter of authorization that allows LiveMessage to send messages from your phone number. After your phone number is enabled, complete the setup in the LiveMessage Setup page.

Set Up LiveMessage

Finish setting up SMS text messaging

We've turned on what we can, but we need a couple things from you before you can start texting your customers.

- 1** Fill out a Letter of Authorization (LOA).
[Download LOA](#)
- 2** Specify the phone numbers you want to use at the bottom of the LOA and sign it.
- 3** Open a case with us and attach the LOA. Make sure you also provide your Customer Legal Name and Customer Account Number.
[Open a Case](#)
- 4** Look for an email confirming that your phone numbers are ready for texting.

[Back](#)  [Finish](#)

When you set up Facebook Messenger, you can optionally create an Omni-Channel queue for your incoming messages. Run the flow multiple times to enable all your company's Facebook pages with LiveMessage.

Set Up LiveMessage

Route messages with Omni-Channel

We've reached a fork in the road. You can create a new queue and routing configuration, or use some that you already have. If you choose existing ones, you'll have to take care of it yourself in your Omni-Channel settings.

Create a new queue and routing configuration

Stop the setup flow and manually connect to an existing queue and routing configuration

Back



Next

SEE ALSO:

[Salesforce Help: Set Up LiveMessage with a Guided Setup Flow \(can be outdated or unavailable during release preview\)](#)

Set Customer Expectations with Automated Response Messages

Use predefined automated responses to set the tone for your agents' conversations with customers. The Chat Acknowledgment message is sent in reply to a customer's initial text message and assures customers that their messages got through. Send automated messages when agents accept and end messaging sessions, when customers consent to receiving messages from your company, and when they revoke consent.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: Users with the Configure LiveMessage and View Setup and Configuration permissions can write predefined automated response messages.

How: In Setup, enter *LiveMessage* in the Quick Find box, and select **LiveMessage Settings**. Select the channel for which you want to customize automated messages, and click **Edit**. Modify the text in the automated response fields, and click **Save**.

SEE ALSO:

[Salesforce Help: Create Automated Responses for LiveMessage Channels \(can be outdated or unavailable during release preview\)](#)

Customize Automated SMS Opt-In and Opt-Out Messages

When a customer sends an SMS text message to your company, LiveMessage replies with an automated message confirming that the customer consents to communicating by SMS. Customers can choose to opt in to receive messages or opt out by replying with a keyword, such as “STOP.” LiveMessage then sends an automated message that acknowledges the customer’s preference. Salesforce provides default text for the opt-in and opt-out messages, and you can customize them to better suit your company’s branding and tone.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: Users with the Configure LiveMessage and View Setup and Configuration permissions can write predefined automated response messages.

How: In Setup, enter *LiveMessage* in the Quick Find box, and select **LiveMessage Settings**. Select the channel for which you want to customize the automated responses, and click **Edit**. Modify the text in the Opt-In and Opt-Out fields, and click **Save**.

SEE ALSO:

[Salesforce Help: Create Automated Responses for LiveMessage Channels \(can be outdated or unavailable during release preview\)](#)

Keep Customers in the Know with Automatic Text Message Notifications

Use LiveMessage to automatically send SMS text message notifications to customers based on certain events. Personalize the message by inserting merge fields to fill in variables such as the customer’s name or the case status. You can also use Process Builder to define a process that sends the message when certain criteria are met. For example, you can create a process that texts the customer when the status field on the customer’s case changes.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: Users with the Configure LiveMessage and View Setup and Configuration permissions can write predefined text messages. Users with the Manage Flow and View All Data permissions can use Process Builder to create processes that send messages when criteria is met.

How: To write a predefined text message, go to Setup, enter *LiveMessage* in the Quick Find box, and select **Messaging Templates**. Click **New**, and write your message.

Next, go to Process Builder and create a process that sends the message when a particular event occurs, such as a change to a Salesforce record. From Setup, enter *Process Builder* in the Quick Find box, and select **Process Builder**. Click **New**, and create your process.

SEE ALSO:

[Salesforce Help: Set Up Automatic Message Notifications in LiveMessage \(can be outdated or unavailable during release preview\)](#)

Send and Receive Images and File Attachments with SMS Text Messaging and Facebook Messenger

They say that a picture is worth a thousand words. Agents and customers can get straight to the point by sending images and files in an SMS message and Facebook Messenger.

Where: LiveMessage in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. This feature is available in orgs with access to LiveMessage through a Digital Engagement add-on.

Who: To exchange messages with customers, users need the Service Cloud license, LiveMessage User permission set license, and View Setup and Configuration permission.

How: In a messaging session, click the paperclip icon to open the file browser. Select a file or image. In the messaging session, click the Send icon.



Note: Toll-free phone numbers don't support attachments.

SEE ALSO:

[Salesforce Help: Communicate with Customers in LiveMessage \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Send Images and Files to Customers in LiveMessage \(can be outdated or unavailable during release preview\)](#)

Help Center: Simple Self-Service

Create a help center that lets your customers help themselves. Display Knowledge articles that answer common questions, and provide a contact button so they can log a case for the issues that require human intervention. Use the new guided setup flow in the Essentials edition to set it up in a few minutes, and manage your help centers from the new Help Center page in Setup.

Where: This feature is new in Lightning Experience in Essentials Edition. The Help Center setup page is available in Essentials Edition. The Help Center template and setup flow are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

SEE ALSO:

[Let Customers Be Self-Sufficient with Help Center](#)

CTI: Call Centers in Service Essentials and More Flexible Softphones

Essentials Edition orgs gain the power of computer telephony integration (CTI). And Call Centers get more flexible with increased height and width limits on softphones.

IN THIS SECTION:

[Use CTI in Service Essentials](#)

Add phone to your small business' support channels to give customers another way to contact you. Make calls from a softphone directly in Salesforce. Call center users can see Salesforce information for incoming calls, make out-going calls directly from Salesforce, and report on call outcome, duration, and more. A call center is great for boosting productivity for Salesforce users that spend time on the phone.

[Increase the Size of Your Open CTI Softphone](#)

The height and width limits for softphones have increased, so CTI partners have more flexibility scaling the phone to match your screen size. Open CTI softphones now support a height of up to 2,560 pixels and a width of up to 1,920 pixels.

Use CTI in Service Essentials

Add phone to your small business' support channels to give customers another way to contact you. Make calls from a softphone directly in Salesforce. Call center users can see Salesforce information for incoming calls, make out-going calls directly from Salesforce, and report on call outcome, duration, and more. A call center is great for boosting productivity for Salesforce users that spend time on the phone.

Where: This change applies to Essentials Edition.

Who: To create and edit Call Centers, you need the Manage Call Centers permission.



Tip: Essentials doesn't support Apex, so your Open CTI implementation can't use the RunApex method.

Increase the Size of Your Open CTI Softphone

The height and width limits for softphones have increased, so CTI partners have more flexibility scaling the phone to match your screen size. Open CTI softphones now support a height of up to 2,560 pixels and a width of up to 1,920 pixels.

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

Who: To create or edit a Call Center, you need the Manage Call Centers permission.

How: In Setup, when you increase the height and width values in your Call Center's definition file, white space is added around the softphone's current dimensions. To make the softphone bigger, contact your CTI partner to adjust the dimensions.

Live Agent: More Setup Options in Lightning Experience, Support for Skills-Based Routing for Chats (Beta), and a Faster Way to Add Quick Text

Access Live Agent setup pages in Lightning Experience, and customize the Live Agent Session record page in the Lightning App Builder. Use Omni-Channel skills-based routing to route Live Agent chats. Agents can use the Quick Text button to add predefined text snippets to chats faster.

IN THIS SECTION:

[Access Live Agent Setup Pages in Lightning Experience](#)

No more switching back to Salesforce Classic just to set up and customize Live Agent! Stay in the modern Lightning Experience that you've come to know and love. All Live Agent setup pages, such as Live Agent Settings, are available in Lightning Experience.

[Customize the Live Agent Session Page in Lightning Experience](#)

Use the preconfigured Lightning page for the Live Agent Session page so that admins who are designing their own Lightning Console apps can customize it. The Live Agent Session page in Lightning Experience is the same as in Salesforce Classic. It shows information about chats, such as how many chat requests were processed, how long agents spent online, and how long agents were actively engaged in chats.

[Use Skills-Based Routing to Route Chats in Live Agent \(Beta\)](#)

Route Live Agent chats to agents who have the right skills to solve the customer's issue. Omni-Channel gives you the flexibility to route chats in the ways that are best for your company. Route all chats by Omni-Channel skills-based routing. Or, route some chats by queues and others by skills. However, you can't transfer chats that are routed by skills-based routing to another agent, queue, or skill.

[Use a Button to Insert Quick Text into Your Chats](#)

Chat agents can save loads of time with quick text, so we made it easier to use. A button for quick text displays in the chat toolbar, so inserting predefined text into chats is just a click away.

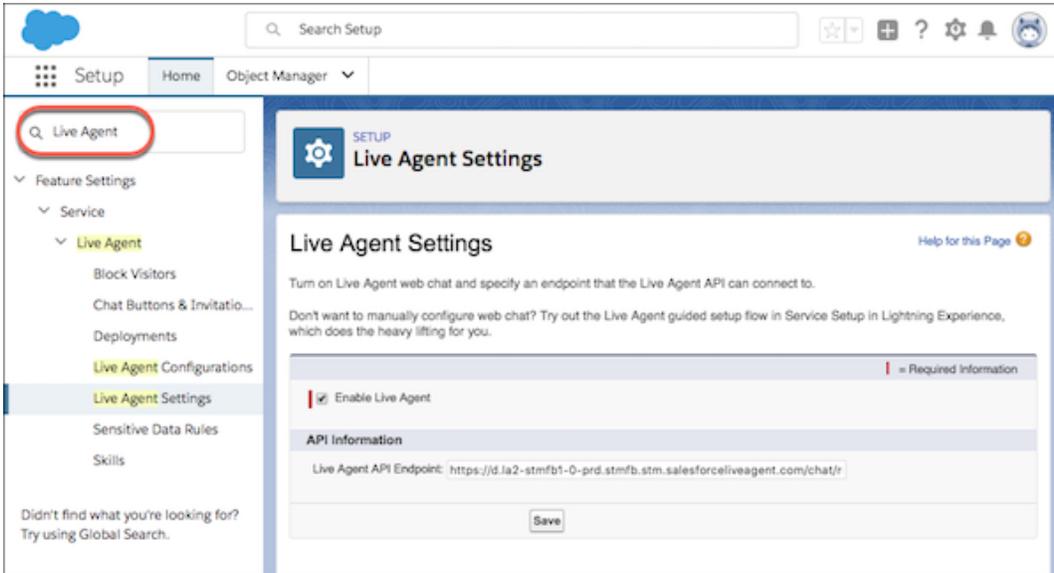
Access Live Agent Setup Pages in Lightning Experience

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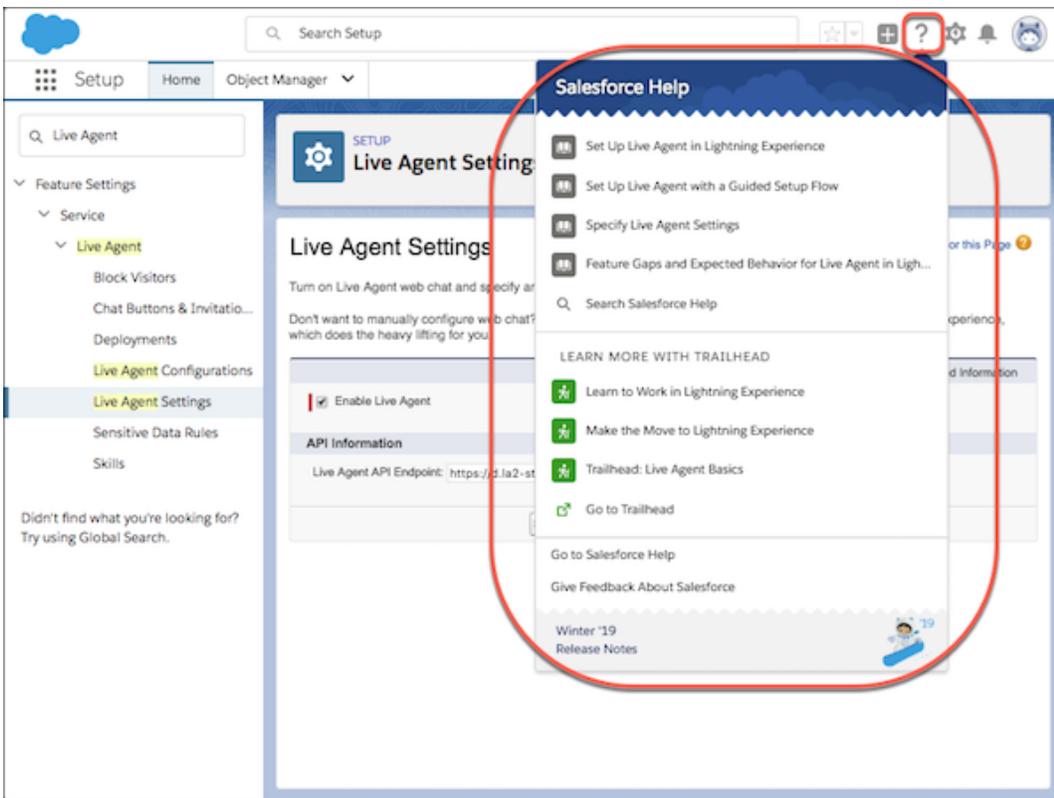
Where: This change applies to Lightning Experience in:

- Performance and Developer editions created after June 14, 2012
- Unlimited Edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

How: In Lightning Experience, in Setup, enter *Live Agent* in the Quick Find box. You can see all the Live Agent setup pages.



Want some help when setting up Live Agent? Click the ? icon to access help topics, Trailhead, and other useful resources.



SEE ALSO:

[Salesforce Help: Set Up Live Agent in Lightning \(can be outdated or unavailable during release preview\)](#)

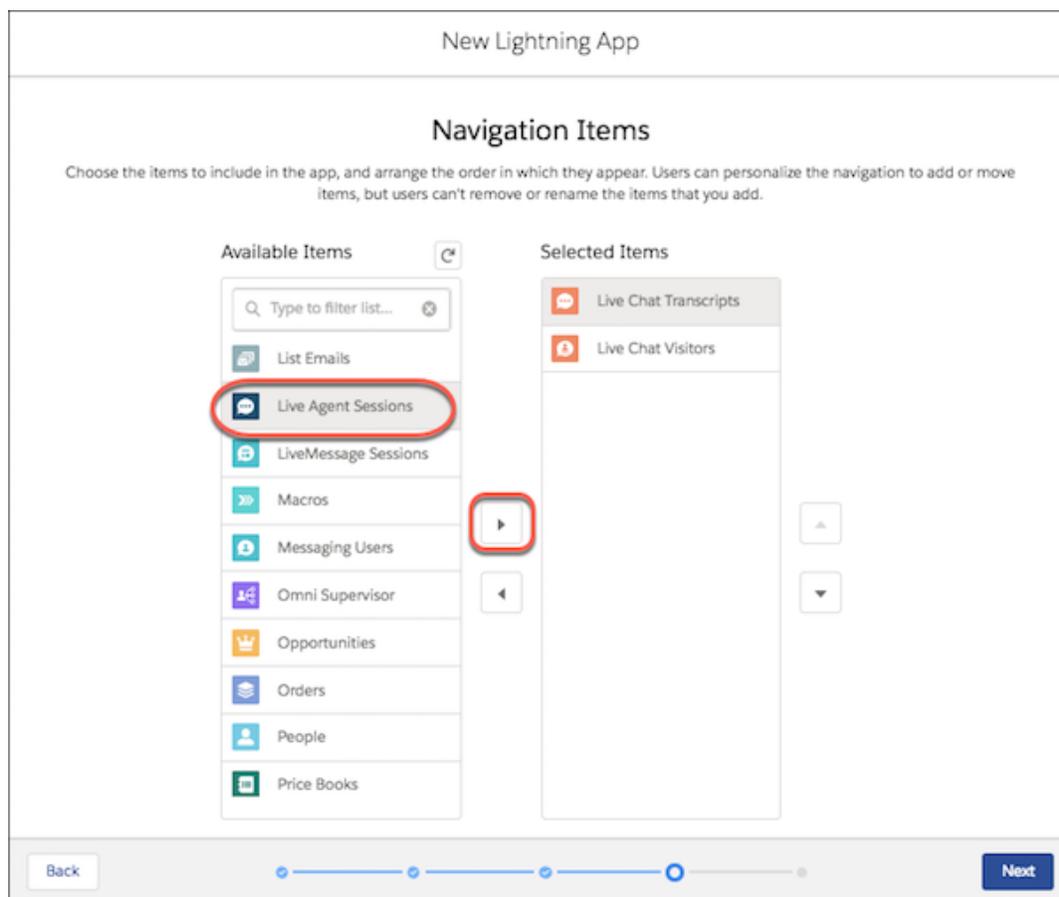
Customize the Live Agent Session Page in Lightning Experience

Use the preconfigured Lightning page for the Live Agent Session page so that admins who are designing their own Lightning Console apps can customize it. The Live Agent Session page in Lightning Experience is the same as in Salesforce Classic. It shows information about chats, such as how many chat requests were processed, how long agents spent online, and how long agents were actively engaged in chats.

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

How: To add the Live Agent Session page to your Lightning Console app, open the Lightning App Manager, and click **Next** until you reach the Navigation Items page. Add the Live Agent Session item to the Selected Items list.



SEE ALSO:

[Salesforce Help: Live Agent Session Records \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create and Edit a Custom Lightning Console App \(can be outdated or unavailable during release preview\)](#)

Use Skills-Based Routing to Route Chats in Live Agent (Beta)

Route Live Agent chats to agents who have the right skills to solve the customer's issue. Omni-Channel gives you the flexibility to route chats in the ways that are best for your company. Route all chats by Omni-Channel skills-based routing. Or, route some chats by queues and others by skills. However, you can't transfer chats that are routed by skills-based routing to another agent, queue, or skill.

Where: Omni-Channel is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

Live Agent is available in Lightning Experience and Salesforce Classic in:

- Performance and Developer editions created after June 14, 2012
- Unlimited Edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

 **Note:** As a beta feature, skills-based routing for Live Agent chats 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 skills-based routing for Live Agent chats in the IdeaExchange in the Trailblazer Community.

Who: Admins need the Customize Application permission to set up Omni-Channel.

How: Set up queue-based routing and skills-based routing in Omni-Channel. Then create a Live Agent deployment with a chat button with the routing type *Omni-Channel Skills*.

Use a Button to Insert Quick Text into Your Chats

Chat agents can save loads of time with quick text, so we made it easier to use. A button for quick text displays in the chat toolbar, so inserting predefined text into chats is just a click away.

Where: This change applies to Lightning Experience in:

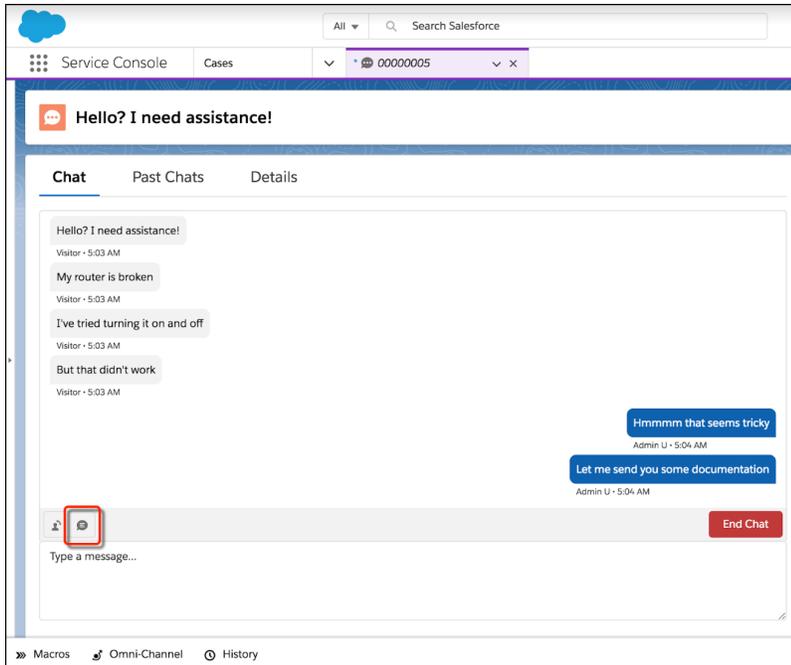
- Performance and Developer editions created after June 14, 2012
- Unlimited Edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

Who: To insert quick text, users need Read permission on the quick text object. Optionally, you can also give users Create, Edit, and Delete access so that they can create and manage their own quick text.

In orgs created after Spring '18, all user profiles include Read access by default. However, users with a Salesforce Platform user license can't work with quick text. If you gave your users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

How: Quick text in Lightning Experience is enabled by default in all orgs. If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience.

When you create or edit quick text, set the Channel field to **Chat**. Then look for the new quick text button when chatting.



SEE ALSO:

[Salesforce Help: Create Quick Text Messages \(can be outdated or unavailable during release preview\)](#)

Snap-Ins Chat: Custom Labels, Snippet Settings File for Communities, and Chatting Across Tabs

Set your own labels in your snap-in for each of your Snap-ins deployments. Create a snippet settings file to include snippet-only customizations in your Communities snap-ins. Customers can take their chat across multiple tabs and windows, so they don't lose their chat while they browse your website. Also, get chat event notifications and utilize Live Agent improvements.

IN THIS SECTION:

[Make Each Snap-In Your Own with Custom Labels](#)

Use your own text in your snap-ins to better reflect your brand or the purpose of each Snap-ins deployment. Set labels for both Snap-ins Chat and Snap-ins Appointment Management (beta). Labels created via Rename Tabs & Labels will be removed. Previously, you could customize labels only at the org level using Rename Tabs & Labels or in individual code snippets.

[Add Code Snippet Settings to Your Communities Snap-Ins](#)

Take your snippet-only settings to your Communities snap-ins. Add features like extra pre-chat configuration and direct-to-button routing. Available on October 16, 2018.

[Get Chat Event Notifications from Snap-Ins Chat](#)

Get notified when certain chat events are triggered by adding a few lines of code to your Snap-ins code snippet.

[Roam Freely and Chat Across Multiple Tabs](#)

There are two types of people: those who use one tab, and those who use fifty. If some of your customers fall into the latter category, they can continue their chats across their various tabs.

Take Advantage of Improvements to Live Agent

Tweak your Live Agent chat settings in Lightning Experience, and your agents can use a new button in the console to add Quick Text to their messages.

Make Each Snap-In Your Own with Custom Labels

Use your own text in your snap-ins to better reflect your brand or the purpose of each Snap-ins deployment. Set labels for both Snap-ins Chat and Snap-ins Appointment Management (beta). Labels created via Rename Tabs & Labels will be removed. Previously, you could customize labels only at the org level using Rename Tabs & Labels or in individual code snippets.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions. Snap-ins setup is available in Lightning Experience.

How: Put on your writing cap and head to the Snap-ins page in Setup. Create or edit a Snap-ins Chat deployment, open your Live Agent or Field Service settings, and click **Edit** next to Additional branding. Click the **Labels** tab and edit away!

Additional branding

Images & Dimensions **Labels**

Labels

Use your own labels for this Snap-ins deployment. Export for translation

Chat State: Pre-Chat | Label Group: All | Save

DEFAULT LABEL	CUSTOMIZED LABEL	TYPE
Live Chat		Standard
What brings you here today?		Standard
Prechat Image		Tooltip
Fill out the form		Accessibility
Start Chatting	Request a Chat	Standard
This field is required.		Standard

Preview

Finish

Choose a chat state or page type, then select a label group. As you edit your labels, a live preview indicates where the label appears in the snap-in. When you finish editing the labels in a label group, click **Save** and move onto another group.

To translate a label, click the arrow next to the label and click **View Label Record**. Then you can translate the label in the Translation Workbench.

Important: Labels customized via Rename Tabs & Labels will be removed. Customize your labels in Snap-ins setup to make sure your snap-ins don't revert to the default labels.

Add Code Snippet Settings to Your Communities Snap-Ins

Take your snippet-only settings to your Communities snap-ins. Add features like extra pre-chat configuration and direct-to-button routing. Available on October 16, 2018.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions. Snap-ins setup is available in Lightning Experience.

How: Create a JavaScript file with the code snippet settings you want to include, upload the file as a static resource, and reference it in the **Snippet Settings File** field in the Community Builder. The snippet settings in the resource file are a little different than the settings you use in the code snippet. Refer to the Snap-Ins for Web Developer Guide for details.

 **Note:** Automated invitations are still unavailable in Communities snap-ins. You also can't set pre-chat fields to populate for logged-in users in this file. Use the **Fill in pre-chat fields** option in your Snap-ins Chat component settings.

Get Chat Event Notifications from Snap-Ins Chat

Get notified when certain chat events are triggered by adding a few lines of code to your Snap-ins code snippet.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions. Snap-ins setup is available in Lightning Experience.

How: Subscribe to events by calling `embedded_svc.addEventHandler()` in your Snap-ins Chat code snippet.

For example, add the following to your code snippet to subscribe to the `onChatRequestSuccess` event.

```
embedded_svc.addEventHandler("onChatRequestSuccess", function(data) {
  console.log("onChatRequestSuccess event was fired. data was " + JSON.stringify(data));
});
```

 **Important:** Calls to `embedded_svc.addEventHandler()` must take place before calls to `embedded_svc.init()`. If your code snippet contains calls to `embedded_svc.init()`, make sure that you enter your calls in the correct order.

The following events broadcast an object back to the client:

- `onAgentMessage`
- `onChasitorMessage`
- `onChatEndedByAgent`
- `onChatEndedByChasitor`
- `onChatEstablished`
- `onChatRequestSuccess`
- `onChatTransferSuccessful`
- `onConnectionError`
- `onIdleTimeoutOccurred`

The following events broadcast back to the client but don't broadcast any data:

- `onClickSubmitButton`
- `onHelpButtonClick`
- `onInviteAccepted`
- `onInviteRejected`

Roam Freely and Chat Across Multiple Tabs

There are two types of people: those who use one tab, and those who use fifty. If some of your customers fall into the latter category, they can continue their chats across their various tabs.

Where: Chatting across tabs and windows is available to your customers when you use Snap-ins code snippet version 5.0 and above.

Why: Your customers want freedom to browse during their chats. They get frustrated and confused when they open a new tab on your website lose their chat connection. Now, you don't lose that interaction (or the customer).

 **Note:** Customers can't chat across tabs and windows if they're using Internet Explorer 11 or Microsoft Edge browsers, or if they're using iOS devices. There are a few other things your tab-enthusiast customers might run into, so check the Snap-ins Chat limitations for the most updated information.

SEE ALSO:

[Salesforce Help: Snap-Ins Chat Limitations \(can be outdated or unavailable during release preview\)](#)

Take Advantage of Improvements to Live Agent

Tweak your Live Agent chat settings in Lightning Experience, and your agents can use a new button in the console to add Quick Text to their messages.

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:

[Access Live Agent Setup Pages in Lightning Experience](#)

[Use a Button to Insert Quick Text into Your Chats](#)

Snap-Ins for Mobile Apps: Use Einstein Bots in Your Native App

The Snap-ins SDK for iOS and Android includes Einstein bot support to complement the chat experience and to keep your agents and customers happy. We also made some general enhancements to the SDK.

Where: This update applies to the Snap-ins for Mobile Apps SDK for iOS (version 214.0.2) and Android (version 214.0.1).

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.

Social Customer Service: YouTube, Emojis, Quick Text, and Public Cloud

Bring another social network into your social service arsenal: YouTube. Communicate without creating a case. Enhance your agent's experience with emojis, take Facebook public posts private, and quick text. Plus, take advantage of the compact feed, Public Cloud support, fewer necessary permissions, and an upgraded managed package.

IN THIS SECTION:

[Support Your Customers on YouTube](#)

Deliver service to your customers by turning their YouTube comments into cases in Salesforce. Connect your YouTube channel directly to Service Cloud, track cases, and respond directly to customers.

[Respond to Social Posts Without Creating a Case](#)

Often your customers are happy and want to let you know. No need to open a case just to thank them on their social network of choice. The Social Publisher action is now available on the Social Post object.

[Show Your Emotions with Emoji](#)

Add emojis to your Social Customer Service content. Click the emoji icon on the Social Publisher and add emojis at your cursor position.

[Keep It Private on Facebook](#)

Not every comment is for everybody. When replying to Facebook posts, select post type Private Message and continue your communication privately.

[Use the Compact Feed for Social Posts](#)

Social posts get all the goodness of the compact feed, which previously only belonged to cases.

[Get Your Agents Ready for Lightning Experience](#)

To help social agents work at lightning speed, we've made the transition to Lightning Experience easier with post recall and fewer necessary permissions.

[Support Your Government Partners in the Public Cloud](#)

Social Customer Service supports the Public Cloud with more secure authentication tokens.

[Upgrade Your Social Customer Service Package](#)

Social Customer Service is now using an improved connected app to power your social service. All orgs that enabled Social Customer Service in Spring '16 and later already have the new app. Orgs that enabled Social Customer Service in Winter '16 or earlier can re-enable Social Customer Service to install the new connected app.

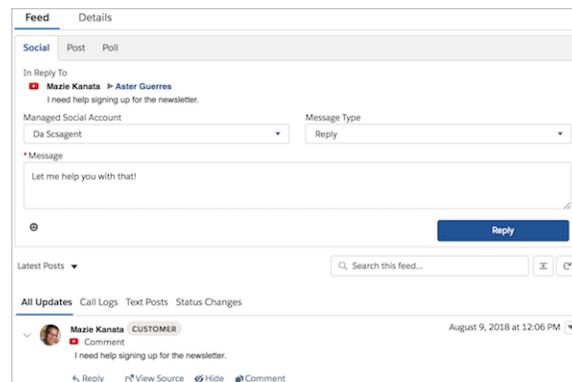
Support Your Customers on YouTube

Deliver service to your customers by turning their YouTube comments into cases in Salesforce. Connect your YouTube channel directly to Service Cloud, track cases, and respond directly to customers.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, and Unlimited Editions.

How: Add your YouTube accounts the same way that you [add Instagram accounts](#). Assign agents the user permission you use to give your agents access to your social accounts. When one of your YouTube videos gets a comment, your agents can reply directly in Salesforce. The video and all relevant comments are visible in the social conversations component.

 **Note:** YouTube isn't available in the starter pack version. You must have a Social Studio account to sync your YouTube account.



For more control over YouTube communications, you can hide replies from YouTube and only reply to your customer. When customers edit or delete their comments, Salesforce updates the social post accordingly.

Respond to Social Posts Without Creating a Case

Often your customers are happy and want to let you know. No need to open a case just to thank them on their social network of choice. The Social Publisher action is now available on the Social Post object.

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

How:

1. Enable Social Customer Service. If you've already set up Social Customer Service, disable it and then re-enable it.
2. Turn on Feed Tracking for Social Posts and enable **All Related Objects**.
3. Add the Social Publisher quick action to the Social Post page layout.
4. Optionally, if you have a customized lightning page layout, manually drag the Chatter component to the page layout.

Agents can reply to social posts from the detail page Chatter feed or from the list of social posts.

Show Your Emotions with Emoji

Add emojis to your Social Customer Service content. Click the emoji icon on the Social Publisher and add emojis at your cursor position.

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

Keep It Private on Facebook

Not every comment is for everybody. When replying to Facebook posts, select post type Private Message and continue your communication privately.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, and Unlimited Editions.

Use the Compact Feed for Social Posts

Social posts get all the goodness of the compact feed, which previously only belonged to cases.

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

To learn more about the compact feed for social posts, check out [Enjoy the Compact Case Feed Everywhere in Lightning Experience](#).

Get Your Agents Ready for Lightning Experience

To help social agents work at lightning speed, we've made the transition to Lightning Experience easier with post recall and fewer necessary permissions.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, and Unlimited Editions.

Why: Sometimes, agents need to change the posts they've already submitted for approval. Now, they can recall the posts they've submitted for approval in Lightning Experience.

Also, social agents no longer need the `View Setup and Configuration` permission to view their available social accounts when responding to a Social Post.

How: [Enable Social Post Approvals](#).

Support Your Government Partners in the Public Cloud

Social Customer Service supports the Public Cloud with more secure authentication tokens.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, and Unlimited Editions.

Upgrade Your Social Customer Service Package

Social Customer Service is now using an improved connected app to power your social service. All orgs that enabled Social Customer Service in Spring '16 and later already have the new app. Orgs that enabled Social Customer Service in Winter '16 or earlier can re-enable Social Customer Service to install the new connected app.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, and Unlimited Editions.

Field Service: Step-by-Step Job Guidance, Service Report Enhancements, and Dispatch Console in Communities

Develop easy-to-navigate lists of tasks to guide your team through their work in the field. Enjoy new options on service reports, including the ability to select the language. Help dispatchers schedule more efficiently by creating custom Gantt color palettes and sharing the dispatching duties with Lightning community users.

IN THIS SECTION:

[Point Your Workforce to the Next Step with Lightning Flow for Service](#)

Your agents, dispatchers, and mobile workers often perform the same sequence of tasks for different customers. Standardize recurring tasks with Lightning Flow for Service, and walk your workers through steps in a guided action list. Create a work type to display the list on your work orders and work order line items.

[Generate Service Reports in Other Languages](#)

When a field service job spans multiple languages, communication can be challenging. A new field on work orders lets you create a service report in any supported language. For example, for a particular work order, you can create one service report in French for the French-speaking customer, and a second one in German for the Berlin-based supervisor.

[Transfer Serialized Product Items \(Beta\)](#)

Create product transfers to track the movement of product items whose Serial Number field is filled out. The location on a product item auto-updates when a transfer is complete, making it easy for your team to find out where the item is stored or installed. Previously, serialized product items couldn't be transferred.

[Write Service Report Triggers](#)

Extend the way you use service reports by creating Apex triggers. For example, set up a trigger to email your customer whenever a service report is created for them.

[Quickly Find Signed Service Reports](#)

When multiple service reports are generated for a work order, work order line item, or service appointment, some might contain signatures and others might not. Use the new Signed checkbox on service reports to identify service reports that contain signatures.

[Automatically Share Service Appointments and Work Orders](#)

Set overriding sharing rules within Salesforce, so when a service resource is assigned a service appointment, the appointment and its parent record are shared with the service resource.

[View Related Product Transfers on Locations and Product Items](#)

The new *Product Transfers (Destination)* and *Product Transfers (Source)* related lists on locations show you product transfers to and from the location. The new *Product Transfers* related list on product items shows related product transfers, which track the movement of inventory.

[User Profile Image Storage on Android](#)

To prevent crashing on Android L devices, the Field Service Lightning Android Mobile App 4.1.1 patch, released September 11, 2018, puts user profile images in external device storage. The new permission is automatically enabled with the patch.

Field Service Managed Package: Community Dispatchers, Gantt Color Palettes, and Custom Actions for the Dispatcher Console

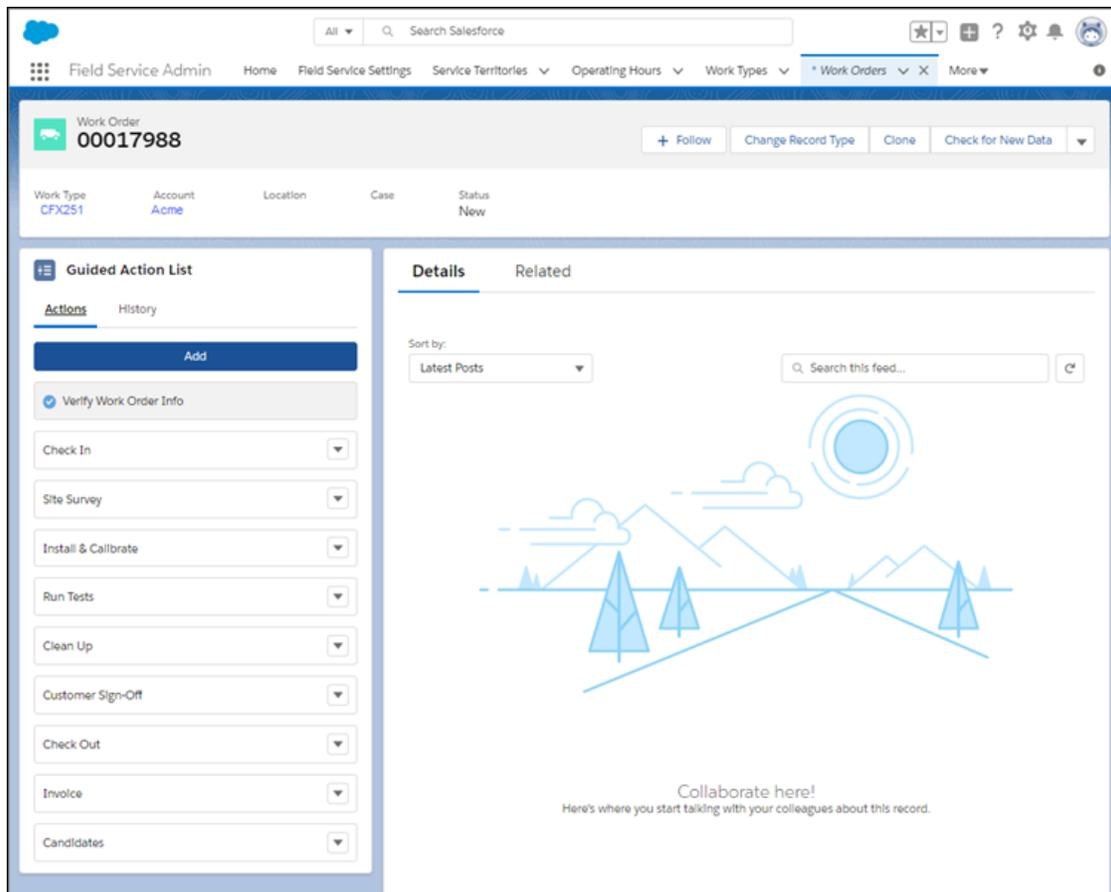
The dispatcher's job just got a little easier. Let contractor managers manage their team's assignments by giving them access to the dispatcher console in a Lightning community. Spruce up the Gantt with custom palettes that color-code service appointments based on a chosen field. Highlight key information in the dispatcher console with the help of custom actions, an upgraded utilization view, improvements to the map, and greater control over appointment booking settings.

Point Your Workforce to the Next Step with Lightning Flow for Service

Your agents, dispatchers, and mobile workers often perform the same sequence of tasks for different customers. Standardize recurring tasks with Lightning Flow for Service, and walk your workers through steps in a guided action list. Create a work type to display the list on your work orders and work order line items.

Where: Field Service Lightning features and the managed package are available in Enterprise, Performance, Unlimited, and Developer Editions. Work orders are also available in Professional Edition.

Who: To add a guided action list to a work type, users need Create on work types.



How: Lightning Flow for Service uses the RecordAction junction object to associate flows with record types. Create flows for your processes with Salesforce automation tools. Use APIs, the Process Builder, or the Guided Action List component to associate flows to records, and create a work type with the guided action list. When a work order or work order line item is created from that work type, your technicians see the list on the record page.

Important: If you want to copy RecordAction objects from a work type to a work order or work order line item, don't define channel settings on that work order and work order line item. If you define channel settings for a work order or work order line

item, you must identify the Work Type field when the work order or work order line item is created. Otherwise, RecordActions from your channel settings are copied over instead of RecordActions from the work type.

At runtime, your workers see the list in a work order or work order line item, and can step through flows in the list to complete their tasks.

 **Note:** You can't run a guided action until a work order or work order line item is created from the work type.

The [Guided Action List component](#) shows flows as they're completed. Refreshing the page removes completed actions from the list. A History tab shows the life cycle of guided actions, including when flows were started, paused, resumed, and completed, and by whom.

SEE ALSO:

[Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track](#)

[Lightning Flow for Service Developer Guide](#)

Generate Service Reports in Other Languages

When a field service job spans multiple languages, communication can be challenging. A new field on work orders lets you create a service report in any supported language. For example, for a particular work order, you can create one service report in French for the French-speaking customer, and a second one in German for the Berlin-based supervisor.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. The Service Report Language field isn't available in the Field Service Lightning mobile app for Android or iOS.

Who: To update the Service Report Language field on a work order, you need Edit permission on work orders.

Why: Previously, service reports used the language of the person generating the report—typically the technician or supervisor. You can now use the Service Report Language field on work orders to indicate which language to translate its service reports into. The selected language is used for all service reports and service report previews created for the work order, its service appointments, and its work order line items and their service appointments.

How: For a language to appear as an option in the Service Report Language field, it must be set up in Translation Workbench or be one of Salesforce's 18 [fully supported languages](#). Service report field names are translated, but rich text field names, service report section names, and text field values (such as service notes) are not.

Select a language in the Service Report Language field on any work order. You can add the field to work order page layouts, update it with the API (API name: `ServiceReportLanguage`), or create a quick action on work orders to update it. If the field is blank, which is the default, the service report uses the language of the person creating the report.

 **Note:** Service reports also have a new Service Report Language field, which indicates the language that the report appears in. The field is read-only and accessible only through the API (API name: `ServiceReportLanguage`).

SEE ALSO:

[Salesforce Help: Create Service Reports \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Code Samples: Custom Dispatcher Console Actions \(can be outdated or unavailable during release preview\)](#)

Transfer Serialized Product Items (Beta)

Create product transfers to track the movement of product items whose Serial Number field is filled out. The location on a product item auto-updates when a transfer is complete, making it easy for your team to find out where the item is stored or installed. Previously, serialized product items couldn't be transferred.

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

 **Note:** This release contains a beta version of Product Transfers for Serialized Product Items, which means it's a high-quality feature with known limitations. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

Who: To create a product transfer that is associated with a serialized product item, you need Read permission on product items and locations and Create permission on product transfers. To mark a product transfer received, you need Edit permission on product items.

Why: Product items, which represent inventory at a particular location, can be tracked in Salesforce with or without a serial number. For example, if you create a product item to represent the 75 hammers stored in your main warehouse, it doesn't make sense to use the Serial Number field. However, for higher-value inventory such as computers, you might decide to create one product item record per item. This lets you record each item's serial number and track its movement.

When a product transfer for a serialized product item is marked received, the product item's location updates to reflect the transfer. For example, suppose you create a serialized product item for a desktop computer stored in your Warehouse A location. The main office then requests a new computer, so you create a product transfer and select the computer's product item in the Source Product Item field. When the transfer is marked received, the product item's Location field changes from Warehouse A to Main Office. Its Quantity On Hand remains unchanged.

How: To allow the transfer of serialized product items, contact Salesforce. After you're given access to this feature, users with the proper permissions can create product transfers for serialized product items just as they would for those without a serial number.

Review the following considerations before using this feature.

- The Location field on serialized product items can't be updated manually.
- When a product transfer associated with a serialized product item is marked received, no product item transaction is created.
- Partial transfers of serialized product items aren't permitted. This means that a product transfer whose source product item is serialized can be marked received only if the product transfer's Quantity Sent and Quantity Received are equal to the product item's Quantity On Hand.

SEE ALSO:

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

[Salesforce Help: How Product Transfers Work \(can be outdated or unavailable during release preview\)](#)

Write Service Report Triggers

Extend the way you use service reports by creating Apex triggers. For example, set up a trigger to email your customer whenever a service report is created for them.

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

How:

- In Lightning Experience: From the Object Manager in Setup, click **Service Report**, then click **Triggers**.
- In Salesforce Classic: From Setup, enter *Service Reports* in the Quick Find box, then click **Triggers** under Service Reports.

SEE ALSO:

[Salesforce Help: Apex Trigger: Send Email when Service Report is Created \(can be outdated or unavailable during release preview\)](#)

Quickly Find Signed Service Reports

When multiple service reports are generated for a work order, work order line item, or service appointment, some might contain signatures and others might not. Use the new Signed checkbox on service reports to identify service reports that contain signatures.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions and to the Salesforce app. The Signed field isn't available in the Field Service Lightning app for Android or iOS.

How: Add the Signed field to the Service Reports related list layout in your service appointment, work order, or work order line item page layouts. This way, a glance at the related list tells you which service reports contain signatures. You can also access it with the API (API name: `IsSigned`).

Feed		Related		
Service Reports (2)				
SERVICE REPORT NAME	CREATED BY	CREATED DATE	SIGNED	
00000004_V2	SitaNA	7/24/2018 4:13 PM	<input type="checkbox"/>	▼
00000004_V1	SitaNA	7/24/2018 4:12 PM	<input type="checkbox"/>	▼
View All				

Note: If you've opted to reuse signatures across service report versions, the Signed field is blank on service reports containing reused signatures.

Automatically Share Service Appointments and Work Orders

Set overriding sharing rules within Salesforce, so when a service resource is assigned a service appointment, the appointment and its parent record are shared with the service resource.

Where: Field Service Lightning standard features and managed package are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions. Work orders are also available in **Professional** Edition.

Why: When a service appointment is assigned to a mobile worker, the worker needs access to the service appointment and its parent work order or work order line item. However, your mobile worker force doesn't need access to all your records.

How: Previously, you used the managed package to share access with only those workers assigned to the service appointment. Now, you can use three new settings on the Field Service Settings page in Setup to limit record access to assigned resources.

Field Service Settings [Help for this Page](#)

- Enable Field Service Lightning
- Notify relevant users in Lightning Experience, the mobile app, and the Field Service Lightning mobile app about updates to work orders and service appointments. [i](#)
- Share dispatched service appointments with their assigned resources [i](#)
- Share service appointments' parent work orders with their assigned resources [i](#)
- Let service crew members edit their service appointments [i](#)

Set the due date of auto-created service appointments to days after the created date. [i](#)

Search work order fields when suggesting articles

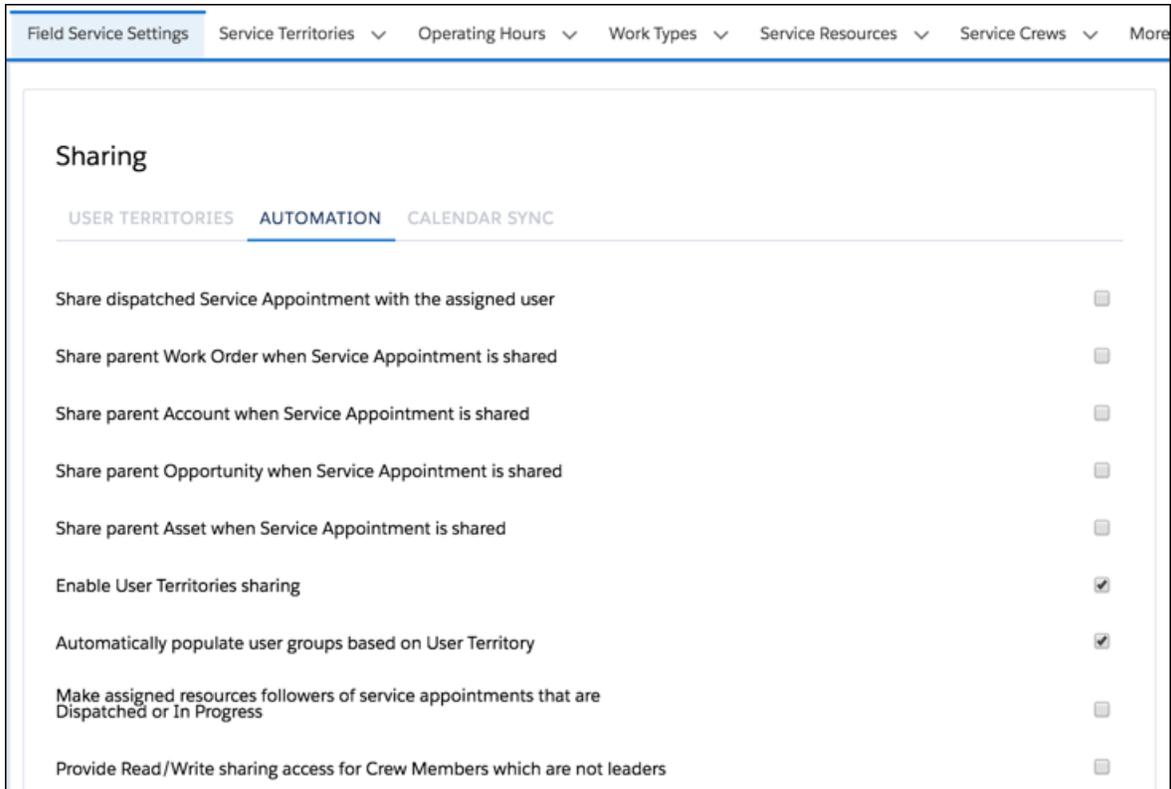
- Work Order Number
- Address
- Subject
- Status
- Priority

Search work order line item fields when suggesting articles

- Duration
- Duration Type
- Duration in Minutes
- Address
- Subject

The default sharing for work orders, work order line items, and service appointments is Public, meaning that all users can view and update all records. If sharing is not private for work orders, work order line items, and service appointments, these settings aren't taken into account.

Important: If you currently use these settings with the Field Service Lightning managed package, disable them in the managed package and enable them on the Field Service Settings page.



View Related Product Transfers on Locations and Product Items

The new *Product Transfers (Destination)* and *Product Transfers (Source)* related lists on locations show you product transfers to and from the location. The new *Product Transfers* related list on product items shows related product transfers, which track the movement of inventory.

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

How: Add the new related lists to your location and product item page layouts.

User Profile Image Storage on Android

To prevent crashing on Android L devices, the Field Service Lightning Android Mobile App 4.1.1 patch, released September 11, 2018, puts user profile images in external device storage. The new permission is automatically enabled with the patch.

Field Service Managed Package: Community Dispatchers, Gantt Color Palettes, and Custom Actions for the Dispatcher Console

The dispatcher's job just got a little easier. Let contractor managers manage their team's assignments by giving them access to the dispatcher console in a Lightning community. Spruce up the Gantt with custom palettes that color-code service appointments based on a chosen field. Highlight key information in the dispatcher console with the help of custom actions, an upgraded utilization view, improvements to the map, and greater control over appointment booking settings.

IN THIS SECTION:

[Let Partners Dispatch from Communities](#)

Hand over the dispatching reins to contractor managers who communicate with your company using a community. The new FSL Community Dispatcher permission set provides all the permissions a community dispatcher needs to use the dispatcher console, view global actions and their related objects, and schedule, optimize, and dispatch service appointments.

[Color-Code the Gantt](#)

Show your true colors at work by creating custom Gantt color palettes based on a service appointment field. A palette can be based on any service appointment field of the following types: checkbox, picklist, date, date-time, number, percent, or currency. For example, create a palette that displays appointments in a custom color spectrum based on the proximity of the due date.

[Add Custom Actions to the Dispatcher Console](#)

Give your dispatchers a little more power by adding custom actions to the dispatcher console. Custom actions can either call an Apex class or open a Visualforce page, and they can be run on records in several areas of the dispatcher console. Actions appear in the action menu of the relevant record or list.

[Customize the Gantt Utilization View](#)

We've made it easier for you to consider utilization in your scheduling. Choose how many days are shown in the Gantt utilization view, view each resource's average utilization for that time span, and sort the resource list by average utilization.

[Do More with Custom Appointment List Filters](#)

Control which columns are displayed in the dispatcher console appointment list when a custom appointment list filter is applied. Previously, the appointment list layout was based on a field set and wasn't affected by custom filters.

[View Resource Absences on the Dispatcher Console Map](#)

Gain more insight into your team's daily routes. Resource absences are shown on the map with an absence icon and the planned route to and from the absence address.

[Book Appointments More Easily](#)

It's now easier to find the perfect time slot when booking appointments. Filter out appointments below a certain grade, open the extended appointment view by default, and pin the three highest-graded time slots to the top of the list.

[Choose When Appointments Appear on the Gantt](#)

Save the (Gantt) date! The new Gantt Display Date field gives you more control over when an appointment appears in the Gantt.

[Turn Off the Chatter Post for Emergency Appointment Dispatch](#)

If your dispatchers prefer to alert technicians about emergency service appointments via phone, an automatic Chatter notification can just add noise. Give dispatchers the option to turn off the Chatter post that notifies assigned resources about a newly dispatched emergency appointment.

[Other Improvements to the Field Service Lightning Managed Package](#)

Learn about other small-but-mighty improvements to the Field Service Lightning managed package.

Let Partners Dispatch from Communities

Hand over the dispatching reins to contractor managers who communicate with your company using a community. The new FSL Community Dispatcher permission set provides all the permissions a community dispatcher needs to use the dispatcher console, view global actions and their related objects, and schedule, optimize, and dispatch service appointments.

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: To use the dispatcher console in a community, users need:

- Partner Community license

- FSL Dispatcher permission set license

Why: Previously, community users didn't have a clear way to get the permissions they needed to access the dispatcher console from the community. (The managed package's FSL Self Service permission set doesn't include dispatching permissions.) This made it tough for contractor managers to share the responsibility of dispatching appointments to their team.

How: After you upgrade to the current release, open the Field Service Admin app. Click **Field Service Settings > Getting Started > Permission Sets**. On the FSL Community Dispatcher tile, click **Create Permissions**. After the permissions are created, assign two permission sets—the FSL Community Dispatcher License permission set, and the FSL Community Dispatcher Permissions permission set—to the appropriate users.

After you create and assign the permissions, embed the dispatcher console in your community. For instructions, see [Add the Dispatcher Console to a Community](#) (may be outdated or unavailable during release preview).

Note:

- Community dispatchers can't access the complex work feature or Live Gantt updates.
- You can add permissions to the permission set, but we don't recommend removing any. Go to the Permission Sets page in Setup to view the permissions included.

Color-Code the Gantt

Show your true colors at work by creating custom Gantt color palettes based on a service appointment field. A palette can be based on any service appointment field of the following types: checkbox, picklist, date, date-time, number, percent, or currency. For example, create a palette that displays appointments in a custom color spectrum based on the proximity of the due date.

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: To view the Palettes tab in the Gantt and apply a palette, users need the Gantt Palettes View permission. To create, edit, and delete Gantt palettes, users need the Gantt Palettes Edit permission.

Why: Use Gantt palettes to inform your scheduling questions and gather information about upcoming appointments at a glance. For example, use custom fields to create palettes that do the following:

- Highlight appointments for VIP customers
- Color-code appointments based on service cost
- Color-code appointments based on the priority level of their parent work order

How: To help you get started, we've given you a sample palette named Due Date Approaching. This palette color-codes appointments based on how close the Due Date is.



Click the Palettes tab in the Gantt filter (1) to switch between palettes. Select a palette and click **Apply Palette** to apply the color scheme to the Gantt and appointment list. The dropdown list shows the 10 most recently modified active palettes. You can always return to the original color scheme by clicking **Use Default Palette** (2).

To create, edit, and delete palettes, click the palette icon (3). Admin users can create and manage palettes, while users with access to the dispatcher console can change which palette is applied.

When you create a palette, select a field to base it on and customize your color settings. For picklist fields, assign a color to each picklist value. For checkbox fields, select two colors signifying checked and unchecked. For numeric or date-based fields, choose how many colors to use, a minimum and maximum color, and a corresponding minimum and maximum value. The palette editor then creates a spectrum for you.

SEE ALSO:

[Salesforce Help: Color-Code the Gantt](#)

Add Custom Actions to the Dispatcher Console

Give your dispatchers a little more power by adding custom actions to the dispatcher console. Custom actions can either call an Apex class or open a Visualforce page, and they can be run on records in several areas of the dispatcher console. Actions appear in the action menu of the relevant record or list.

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.

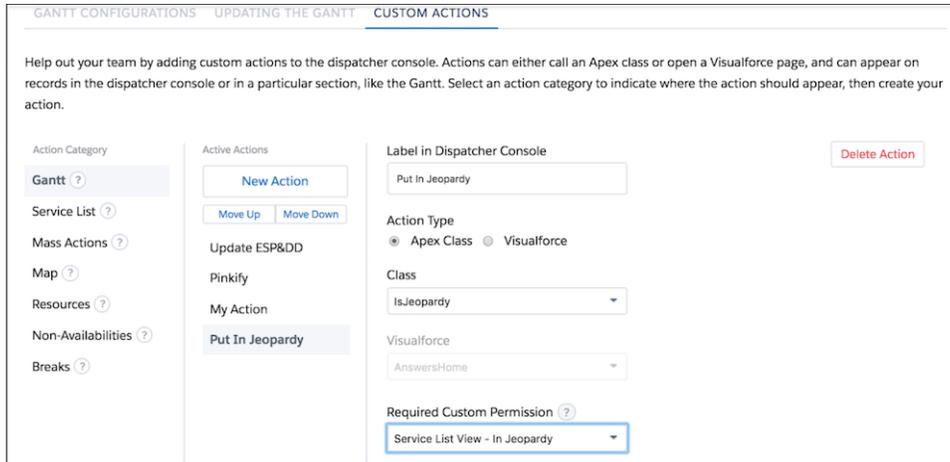
Why: Custom actions let you put more specialized actions at your dispatchers' fingertips. For example, create actions that:

- Call an Apex class that reassigns all selected service appointments to a different service resource
- Open a Visualforce page where the dispatcher can update the Earliest Start Permitted on all appointments within a polygon (for example, if the polygon represents a flood in the service territory)

You can add custom actions to the following areas in the dispatcher console.

- Individual or multiple appointments in the appointment list
- Individual or multiple appointments in the Gantt
- Individual service resources or resource absences in the Gantt
- Polygons on the map (the action runs on the appointments within a polygon)

How: Start by creating an Apex class or Visualforce page to connect to an action. Create and assign a custom permission to limit who sees the action, or use an existing permission. Then create your action. From the App Launcher, open the Field Service Admin app and click **Field Service Settings > Dispatcher Console UI > Custom Actions**. Select where you want the action to appear, click **New Action** to add details, and save your action. When a custom action is created or edited, the Gantt must be refreshed for users with the proper permission see it in the dispatcher console.



For details on how to configure your Apex class or Visualforce page to be used in a dispatcher console custom action, see [Code Samples: Dispatcher Console Custom Actions](#) (can be outdated or unavailable during release preview).

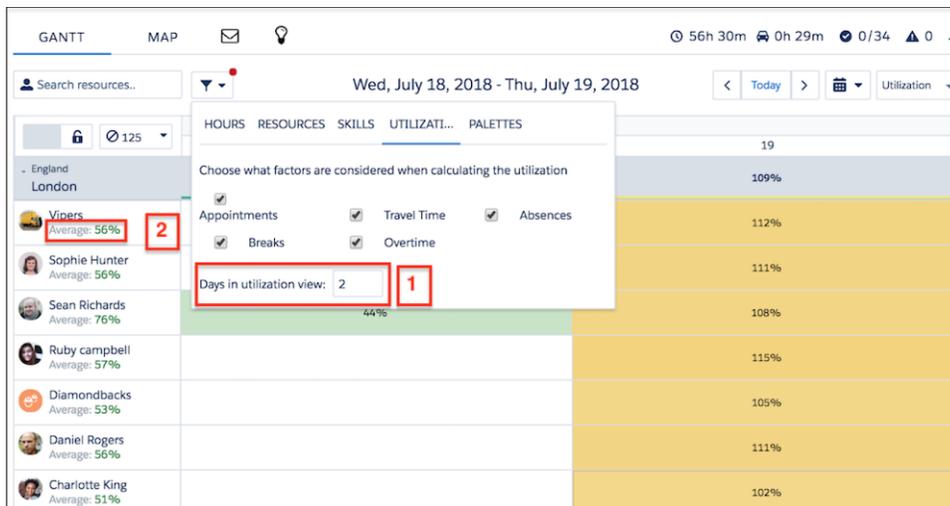
Note: Actions can't open Visualforce pages that are part of a managed package

Customize the Gantt Utilization View

We've made it easier for you to consider utilization in your scheduling. Choose how many days are shown in the Gantt utilization view, view each resource's average utilization for that time span, and sort the resource list by average utilization.

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.

Why: Salesforce calculates the utilization of each service resource to help you make scheduling decisions. Control how utilization is calculated by selecting one or more factors on the Utilization tab of the Gantt filter: Appointments, Travel Time, Absences, Breaks, or Overtime.



On the Utilization tab, specify how many days are shown in the utilization view (1). By default, it's set to the maximum of 31.

The resource list (2) shows each resource's average utilization percentage for the visible time period. You can also sort the resource list based on average utilization from the Resources tab in the Gantt filter.

How: Customize your utilization settings from the Utilization and Resources tabs in the Gantt filter. To switch to the utilization view, select **Utilization** in the Gantt resolution dropdown in the top right-hand corner of the Gantt.

SEE ALSO:

[Salesforce Help: Measure Resource Utilization \(can be outdated or unavailable during release preview\)](#)

Do More with Custom Appointment List Filters

Control which columns are displayed in the dispatcher console appointment list when a custom appointment list filter is applied. Previously, the appointment list layout was based on a field set and wasn't affected by custom filters.

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 for the appointment list. To share or hide custom filters with the **Make this filter available for all users** setting, they also need the Publish Filter custom permission.

Why: Normally, the order and contents of the appointment list are controlled by the Service Appointment List Columns field set. Now, custom appointment list filters include the option to customize the appointment list columns. For example, if you created a filter based on appointment status, you might want the Status field to be shown first in the appointment list.

How: If you haven't yet enabled custom filters, open the Field Service Admin app from the App Launcher. From Field Service Settings, go to **Dispatcher Console UI** and select **Enable Custom Filters**.

Create a filter by clicking the edit icon in the top right corner of the appointment list. Make sure to select **Make this filter available for all users**. Otherwise, the filter is visible only to you.

Enter your filter details. In the new Fields to Display section, select the fields to use as columns in the appointment list when the filter is in use.

SEE ALSO:

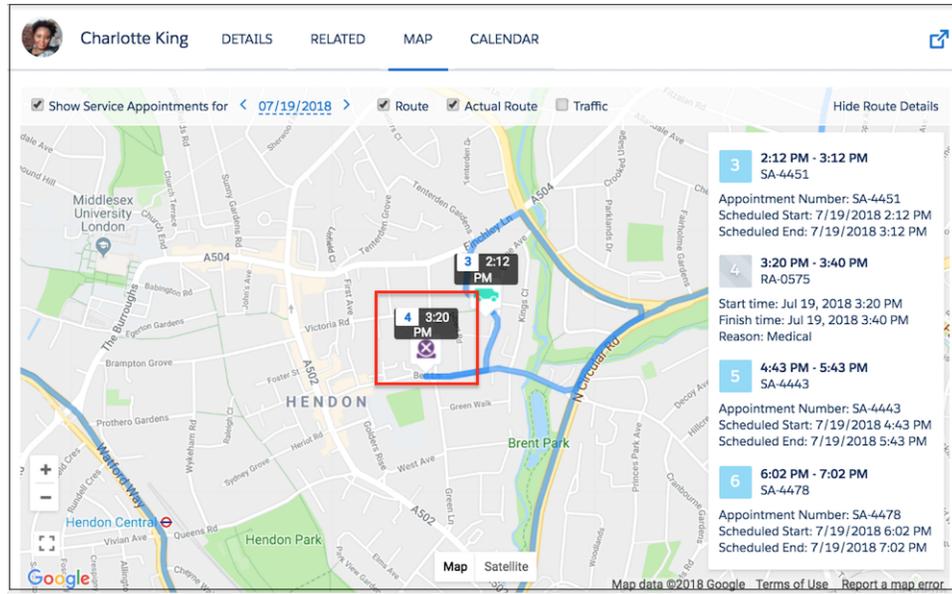
[Salesforce Help: Create Custom Appointment List Filters with the Field Service Lightning Managed Package \(can be outdated or unavailable during release preview\)](#)

View Resource Absences on the Dispatcher Console Map

Gain more insight into your team's daily routes. Resource absences are shown on the map with an absence icon and the planned route to and from the absence address.

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.

Why: Previously, if a technician had a scheduled absence during the work day, the absence wasn't reflected on the map. Dispatchers could see the planned route between the appointments before and after the absence, but the length of the absence was included in the travel time, leading to confusion.



How: From the App Launcher, open the Field Service Admin app. Click **Field Service Settings > Dispatcher Console UI > Gantt Configurations**. Select **Show absences on resource map**.

Note: A resource absence must be properly geocoded by data integration rules—meaning it needs a Latitude and Longitude—to appear on the map.

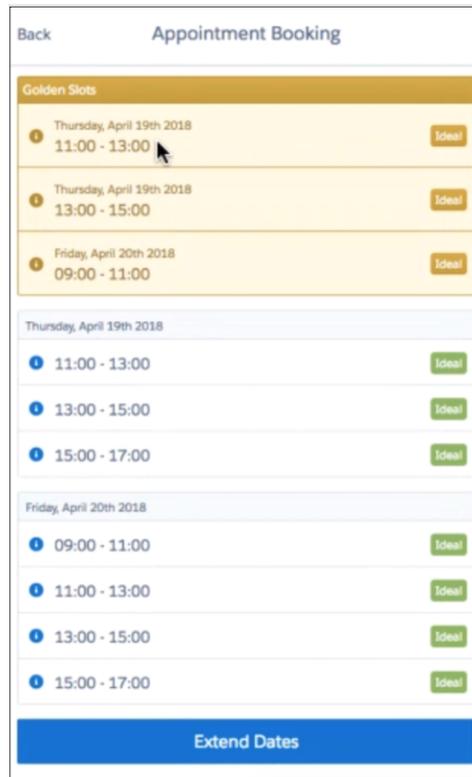
Book Appointments More Easily

It's now easier to find the perfect time slot when booking appointments. Filter out appointments below a certain grade, open the extended appointment view by default, and pin the three highest-graded time slots to the top of the list.

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.

Why: When you're trying to book an appointment, each potential time slot is assigned a grade based on how closely it matches your appointment booking criteria. Set a minimum grade—for example, 50—to limit the potential time slots shown.

Just interested in the top-scoring time slots? The top three highest-scoring time slots are highlighted in gold and pinned to the top of the list.



When you're booking an appointment, clicking **Show More Options** opens the extended view, revealing the appointment's Earliest Start Permitted and Due Date. Display these fields by default so clicking **Show More Options** isn't necessary.

How: Open the Field Service Admin app from the App Launcher. Click **Field Service Settings > Global Actions > Appointment Booking** and configure the new settings:

- **Minimum Grade** (0 by default)
- **Open extended view by default** (not selected by default)
- **Pin three highest graded time slots to the top** (selected by default)

Choose When Appointments Appear on the Gantt

Save the (Gantt) date! The new Gantt Display Date field gives you more control over when an appointment appears in the Gantt.

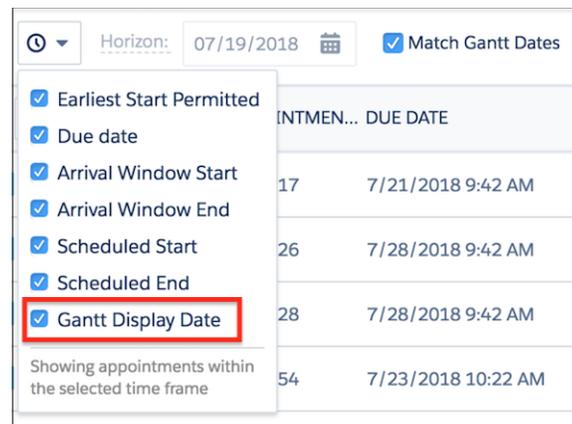
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Why: The Gantt time frame is controlled by the following settings:

- The scheduling window limit defined in the dispatch console settings
- The Horizon shown on the appointment list
- The **Match Gantt Dates** checkbox on the appointment list, which affects the Horizon
- Any Gantt filter that is applied

The date fields selected in the appointment list dropdown menu—Earliest Start Permitted, Due Date, Arrival Window Start and End, and Scheduled Start and End—determine which appointments are visible on the Gantt. If the value of any of the selected date fields on an appointment falls within the specified time frame, the appointment appears on the Gantt.

However, sometimes you want an appointment to be shown on the Gantt whose dates don't fall within the time frame. For example, maybe a maintenance appointment must be completed within the next six months, and you want to see it on the Gantt every day as a reminder. To avoid changing its date settings for display purposes, you can now use the new Gantt Display Date field on service appointments. When a service appointment's Gantt Display Date falls within the Gantt time frame, the appointment is visible on the Gantt.



How:

- To use the Gantt Display Date field, add it to your service appointment page layouts.
- To control which date fields are considered when displaying appointments on the Gantt, click the clock icon in the appointment list. Gantt Display Date is not selected by default.
- To update the scheduling window limit, click the settings icon in the appointment list and click **Dispatch console settings**. Update the Horizon date directly from the appointment list.



Tip: Set up a process in Lightning Process Builder to automatically configure an important appointment's Gantt Display Date to today's date, updated daily.

Turn Off the Chatter Post for Emergency Appointment Dispatch

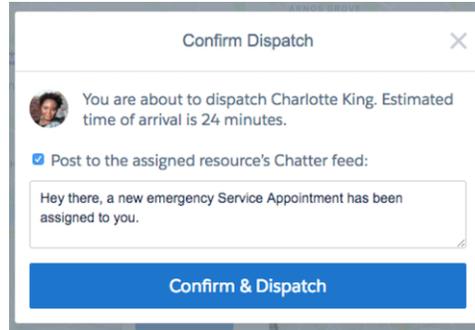
If your dispatchers prefer to alert technicians about emergency service appointments via phone, an automatic Chatter notification can just add noise. Give dispatchers the option to turn off the Chatter post that notifies assigned resources about a newly dispatched emergency appointment.

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.

Why: Previously, technicians assigned to emergency service appointments were notified about the appointment via a customizable Chatter post. Now, you can turn off Chatter posts for emergency dispatches, or give dispatchers the option to make a custom Chatter post or to not post at all.

How: Open the Field Service Admin app from the App Launcher. Click **Field Service Settings**, then click **Global Actions > Emergency Wizard**.

- To let dispatchers decide on a case-by-case basis whether to notify the assigned resource in Chatter when an emergency appointment is dispatched, make sure that **Allow Chatter post** is selected. Dispatchers will see the following screen during the dispatch process.



- To turn off Chatter posts in all emergency dispatches, deselect **Allow Chatter post**.

Other Improvements to the Field Service Lightning Managed Package

Learn about other small-but-mighty improvements to the Field Service Lightning managed package.

Where: These changes apply to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning Managed Package installed.

Why: These improvements make it easier to navigate the dispatcher console and configure your automation settings. Here's what changed.

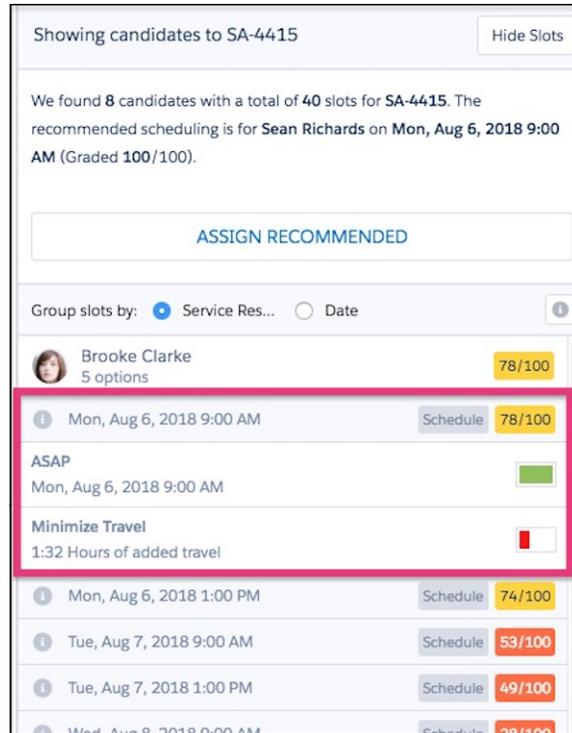
The Gantt remembers more of your display preferences

When you navigate away from the Gantt, the following settings will stay as you left them:

- Utilization property settings, which are found in the Utilization tab of the Gantt filter
- Whether territories are expanded or collapsed
- Which date fields are selected in the appointment list dropdown menu (reached by clicking the clock icon)

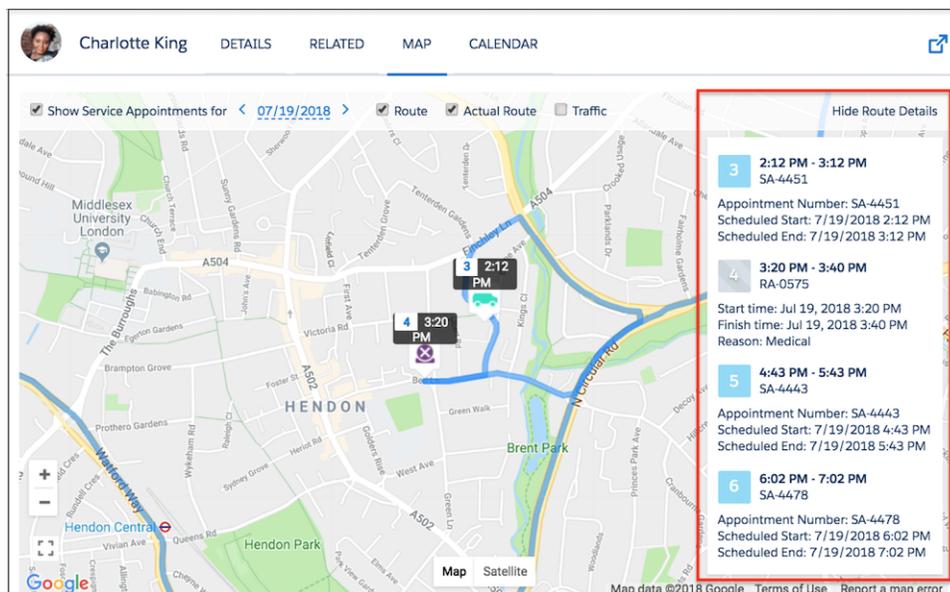
View candidate score details in the dispatcher console

When using the Get Candidates action in the dispatcher console, click the blue info icon next to a candidate's name to see their score for each service objective that is part of the scheduling policy in use. These scores are averaged to form the candidate's overall score.



New home for the route details pane

The route details pane on the map has moved from the bottom of the map to the right-hand side. Hide the pane by clicking **Hide Route Details**. To zoom in on an appointment, hover over the appointment number in the pane and click **Center on Map**.



Search more thoroughly from the appointment list

The appointment list search lets you enter a search query to filter the appointments in the list. Previously, if no appointments in the list matched your search query, you saw a “No Appointments” message. Now if no appointments match your query, you can click **Search All Records** in the body of the appointment list to search all service appointments in the org. This allows you to force-add a service appointment to the appointment list that doesn’t match the Gantt loading criteria.

Search for and select all territories when setting up automation jobs

The territory list in automation job settings now comes with a search field, a scroll bar, and links to select or deselect all territories. These options are visible in the Field Service Admin app, Field Service Settings tab: Just navigate to the scheduled job settings for Optimization, Dispatch, and Sharing.

No more automatic permission assignment in Guided Setup

Previously in Guided Setup, Salesforce automatically assigned necessary object and user permissions if you didn't already have them. Now, we display a message letting the user know which permissions they need and telling them to request them from their admin.

How: These improvements are automatically available to users—no setup needed!

Case Management: Omni-Channel Skills-Based Routing, Copy and Paste for Images, and Folders for Macros and Quick Text

Use Omni-Channel skills-based and queue-based routing together for a robust solution to assign work items to agents. And after your agents receive a work item, they have more tools to help them close the case. Agents can copy and paste images directly into case emails. And folders help them organize and share macros and quick text more easily.

IN THIS SECTION:[Service Console: Folders for Productivity, Customized Navigation Items, and a Switcher for Lightning Experience](#)

We're always looking for ways to make your agents faster in the Service Console. Agents can now use folders to organize macros and quick text into logical groups, and they can even share an entire folder with other agents. Agents can also customize their navigation items for a personalized experience. For folks using a Salesforce Classic console app, you have a faster way to switch to Lightning Experience—just look for a link in your user profile menu.

[Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track](#)

Lightning Flow for Service, formerly called Lightning Guided Engagement, keeps your agents focused so that they can solve cases more quickly. The Guided Action List component includes a History tab that shows agents at a glance when flows were started, paused, resumed, or completed. You can predefine the guided actions that agents can add to the list to put the steps that they use most often at their fingertips. And with a reminder to finish mandatory steps, your agents won't forget to complete essential processes.

[Cases: Compact Feed Enhancements and Visualforce Templates in Lightning Experience](#)

Maximize your screen space with the compact case feed in narrow columns. You can also use the compact feed wherever a case feed appears in Lightning Experience. Attachments from Email-to-Case messages automatically convert to Salesforce Files. Embed images into emails with copy and paste, providing a URL, or from Salesforce Files.

Omni-Channel: Skills-Based Routing Improvements and Chat Monitoring

Enjoy more flexibility over how Omni-Channel assigns work items in your org. Route work items using both queue-based routing and skills-based routing simultaneously in the same org. Route Live Agent chats to the right agents with skills-based routing (a beta functionality). Support managers can keep an eye on work routed by queues and by skills in Omni-Channel Supervisor. Some Omni-Channel Supervisor tabs have new names to clarify what information they show. Let supervisors monitor chats in progress so that they can help out as needed, and give supervisors a preview of what agents and customers are typing.

Agent Productivity: Folders and Sharing and Buttons, Oh My

Organize macros and quick text in folders to easily find what you're looking for. Share entire folders to give other users easy access to macros or quick text. New buttons make inserting quick text easier and more visible to encourage users to take advantage of this time-saving tool.

Service Console: Folders for Productivity, Customized Navigation Items, and a Switcher for Lightning Experience

We're always looking for ways to make your agents faster in the Service Console. Agents can now use folders to organize macros and quick text into logical groups, and they can even share an entire folder with other agents. Agents can also customize their navigation items for a personalized experience. For folks using a Salesforce Classic console app, you have a faster way to switch to Lightning Experience—just look for a link in your user profile menu.

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 the Salesforce-provided Service Console app.

How: Check out the new features available in the Service Console.

Lightning Console Apps: Customizable Tabs, Customizable Navigation Items, More APIs, and Visualforce Overrides

Make console your own with customizable tab titles, tab icons, and navigation items. You can also generate and open console URLs, and set your navigation item with the Lightning Console JavaScript API. Visualforce override support in console apps allow you to leverage your Visualforce overrides in Salesforce Classic.

Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track

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Agent Productivity: Folders and Sharing and Buttons, Oh My

Organize macros and quick text to easily find what you're looking for. Share entire folders to give other users quick and easy access to all macros or quick text inside that folder. Inserting quick text is even easier with new buttons in emails, Knowledge, chats, events, tasks, and more.

Cases: Compact Feed Enhancements and Visualforce Templates in Lightning Experience

Maximize your screen space with the compact case feed in narrow columns. You can also use the compact feed wherever a case feed appears in Lightning Experience. Attachments from Email-to-Case messages automatically convert to Salesforce Files. Embed images into emails with copy and paste, providing a URL, or from Salesforce Files.

Switch to Lightning Experience Directly from Your Salesforce Classic Console App

It's now easier to access Lightning Experience from your Salesforce Classic console apps. Just click the **Switch to Lightning Experience** link in your user profile menu. The link shows up automatically for all users in a Salesforce Classic console app.

Change Your View with Display Density Settings

Your agents can control how they view data with two new Lightning Experience display density settings. You don't even need to modify a page layout. Agents simply change the density of their console from their user profile menu.

SEE ALSO:

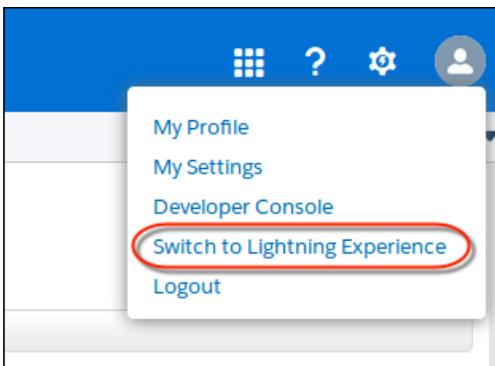
[Salesforce Help: Lightning Experience Console Limitations \(can be outdated or unavailable during release preview\)](#)

Switch to Lightning Experience Directly from Your Salesforce Classic Console App

It's now easier to access Lightning Experience from your Salesforce Classic console apps. Just click the **Switch to Lightning Experience** link in your user profile menu. The link shows up automatically for all users in a Salesforce Classic console app.

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

How: After you click the link, the default Lightning Experience app opens. To change your default app, update the default app selection in the Custom App Settings for a user profile.



Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track

Lightning Flow for Service, formerly called Lightning Guided Engagement, keeps your agents focused so that they can solve cases more quickly. The Guided Action List component includes a History tab that shows agents at a glance when flows were started, paused, resumed, or completed. You can predefine the guided actions that agents can add to the list to put the steps that they use most often at their fingertips. And with a reminder to finish mandatory steps, your agents won't forget to complete essential processes.

IN THIS SECTION:

[Identify Status Quickly Using the History Tab on the Guided Action List](#)

Let your agents and case supervisors see a history of guided actions, learn what's been completed, and make sure that no steps were missed. The History tab on the Guided Action List component shows which flows were launched, by which agents, and when each one was started, paused, resumed, and completed. Agents can see what's happened to date, helping them identify gaps and resolve issues more quickly.

[Focus Your Agents with a Subset of Guided Actions](#)

Define a subset of guided actions that agents can add to your Guided Action List. When they click **Add**, they can choose from a focused list, rather than all active screen flows in your org.

[Warn Agents When a Guided Action Is Mandatory](#)

Remind your agents to complete steps that are required to meet compliance goals or business rules. When agents launch a guided action that's mandatory and then try to close the tab or window, they see a warning that encourages them to complete it.

SEE ALSO:

[Launch Flows in Standard Navigation Apps with Lightning Flow for Service](#)

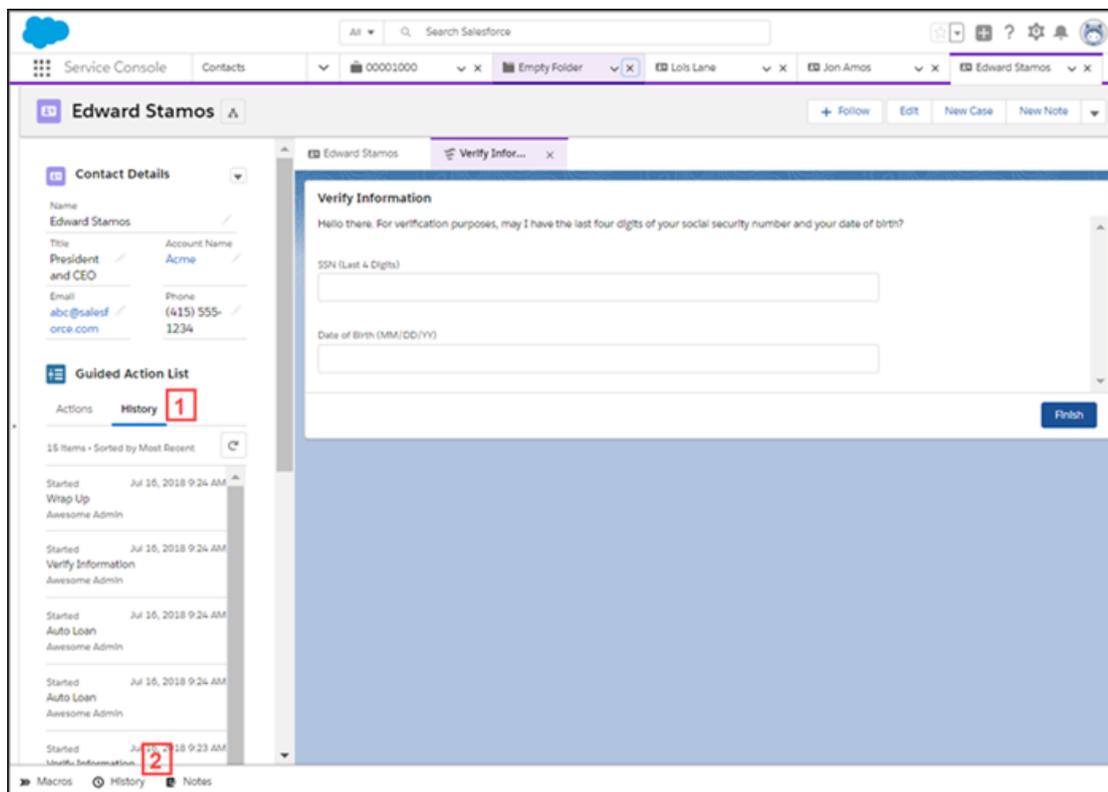
[Point Your Workforce to the Next Step with Lightning Flow for Service](#)

Identify Status Quickly Using the History Tab on the Guided Action List

Let your agents and case supervisors see a history of guided actions, learn what's been completed, and make sure that no steps were missed. The History tab on the Guided Action List component shows which flows were launched, by which agents, and when each one was started, paused, resumed, and completed. Agents can see what's happened to date, helping them identify gaps and resolve issues more quickly.

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

How: When you add a Guided Action List component to your page using the Lightning App Builder, agents see a History tab (1). The tab shows past guided actions for the record, with the most recent actions listed first. Each entry includes the agent's name, a timestamp, and a status: started, paused, resumed, or completed. Guided actions are no longer listed in the History utility (2) accessed from the utility bar.



SEE ALSO:

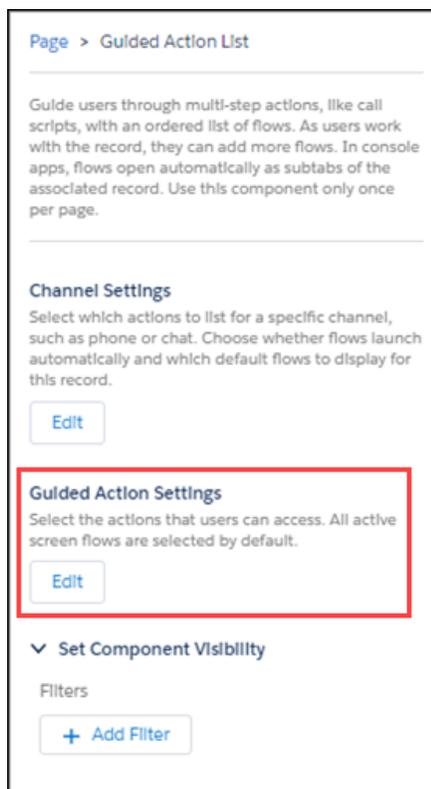
[Lightning Flow for Service Developer Guide](#)

Focus Your Agents with a Subset of Guided Actions

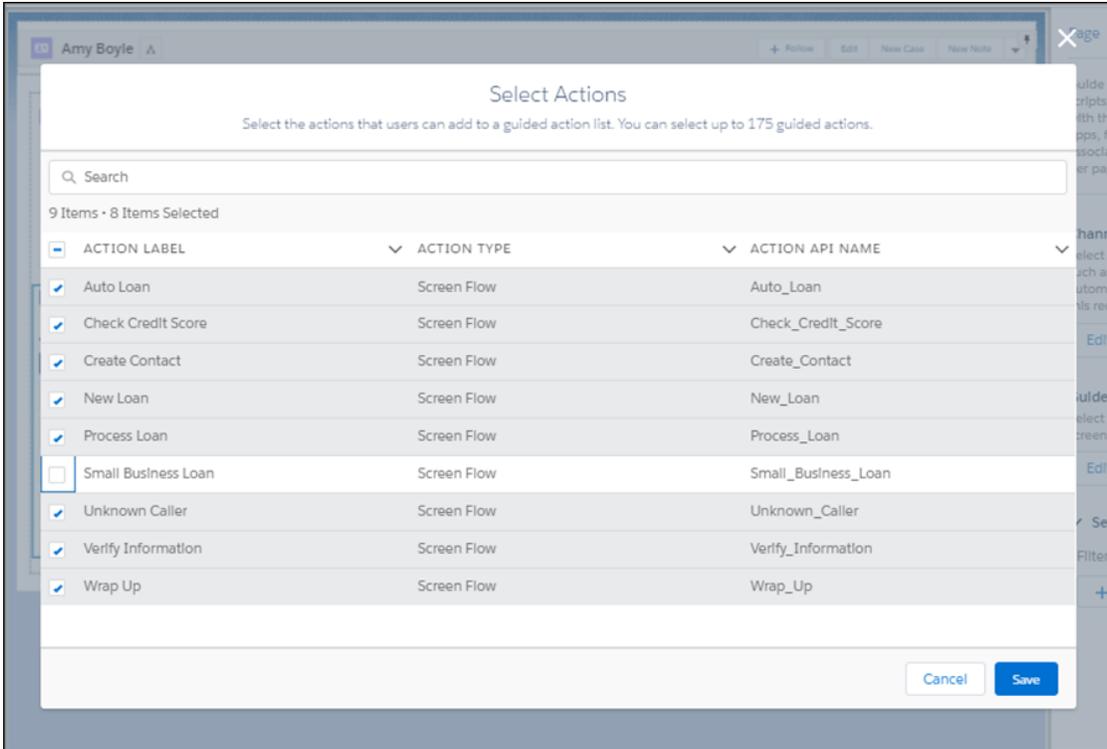
Define a subset of guided actions that agents can add to your Guided Action List. When they click **Add**, they can choose from a focused list, rather than all active screen flows in your org.

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

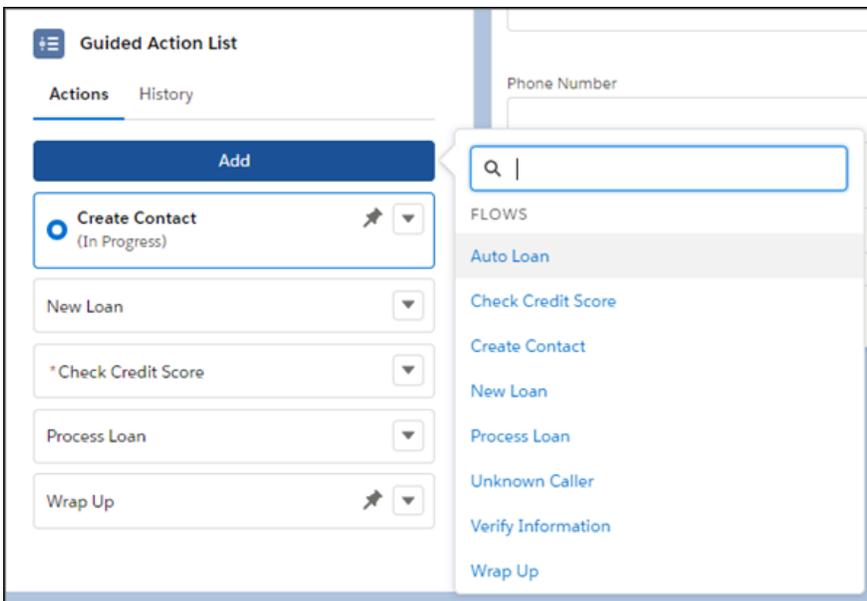
How: Using the Lightning App Builder, add the Guided Action List component to a record. Edit the Guided Action Settings.



Select up to 175 guided actions that are available to your agents in the action picker when they click **Add**. Your agents can then locate an action quickly and add it to the Guided Action List.



If you don't configure a subset, the action picker shows your agents all active screen flows in your org.



SEE ALSO:

[Lightning Flow for Service Developer Guide](#)

Warn Agents When a Guided Action Is Mandatory

Remind your agents to complete steps that are required to meet compliance goals or business rules. When agents launch a guided action that's mandatory and then try to close the tab or window, they see a warning that encourages them to complete it.

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

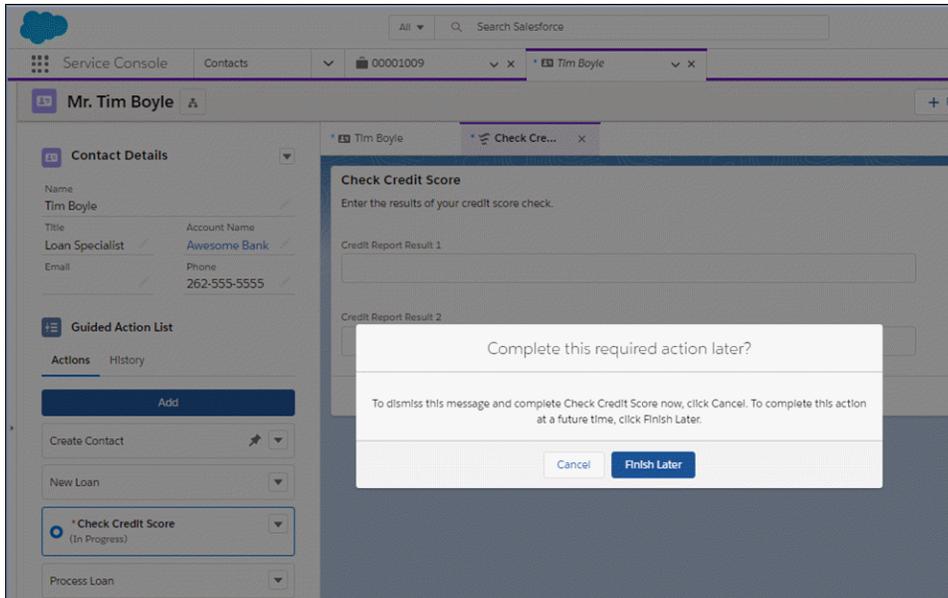
How: Use the Cloud Flow Designer to create a flow. Then use the Process Builder to associate a record with the flow using the RecordAction junction object. To indicate that the flow is required, add the optional field `Is Mandatory`, and set the field value to True.

The screenshot shows the 'Create a Record' configuration window. It includes the following fields and values:

- Action Name:** Add Verify Info Flow
- Record Type:** RecordAction
- Set Field Values:**

Field	Type	Value
Flow	Picklist	Verify_Information
Order	Number	1
Parent Record ID	Field Reference	[Contact].Id
Pinned	Picklist	None
Is Mandatory	Boolean	True

When an agent tries to close a tab or window with a guided action that's mandatory, a message explains that the action is required. Clicking **Cancel** dismisses the warning and continues the flow. The agent can also click **Finish Later**, which closes the tab or window.



SEE ALSO:

[Lightning Flow for Service Developer Guide](#)

Cases: Compact Feed Enhancements and Visualforce Templates in Lightning Experience

Maximize your screen space with the compact case feed in narrow columns. You can also use the compact feed wherever a case feed appears in Lightning Experience. Attachments from Email-to-Case messages automatically convert to Salesforce Files. Embed images into emails with copy and paste, providing a URL, or from Salesforce Files.

IN THIS SECTION:

[Embed Images into Case Emails in Lightning Experience](#)

Thanks to a new button, agents can insert images into their case emails more easily. In the Email action for cases, look for the button in the email toolbar. Agents can insert images from Salesforce Files, and from web URLs. Agents can also copy and paste images from the clipboard.

[Enjoy the Compact Case Feed Everywhere in Lightning Experience](#)

Use the compact feed wherever case or social feeds appear in Lightning Experience. You can also configure the compact feed for standard navigation apps or console navigation apps.

[Work More Efficiently in Your Case Feed in Lightning Experience](#)

The button to collapse or expand all items in the case feed is smarter. Also, the number of feed items loaded is proportional to the size of your screen— a taller window means more feed items load. As you scroll down, more case feed items load automatically. The case feed is now supported in narrow columns of 25% width in the Lightning App Builder, so you can make the most of your screen space.

[Use Visualforce Email Templates in Lightning Experience](#)

Agents save tons of time drafting emails using email templates. Now you can use the power of Visualforce email templates in Lightning Experience. Users insert text, field data, and email attachments into the case email publisher with just a few clicks.

[Share and Preview Files By Automatically Saving Email-to-Case Attachments as Salesforce Files](#)

Attachments to newly received Email-to-Case messages are automatically converted into Salesforce Files. This conversion lets agents conveniently preview without downloading the attachment to their computer. Salesforce Files are searchable and shareable across Salesforce, so agents don't have to navigate to a record's related list to find the file.

[Set Audit Fields When Importing Emails](#)

You can now set the audit fields for email message records that are created as part of importing email messages through the API into Salesforce. That way, your records reflect the same audit field details as the original email messages, such as who created the email and when it was created.

[Fight Spam—Reject Cases Without reCAPTCHA Verification](#)

Stop spammers from sending you bogus cases. Reject cases from Web-to-Case that don't use reCAPTCHA verification.

SEE ALSO:

[Click Away—Insert Quick Text into Your Emails with a Button](#)

Embed Images into Case Emails in Lightning Experience

Thanks to a new button, agents can insert images into their case emails more easily. In the Email action for cases, look for the button in the email toolbar. Agents can insert images from Salesforce Files, and from web URLs. Agents can also copy and paste images from the clipboard.

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

SEE ALSO:

[Idea Exchange: Allow "Inline" Images in Email Sent from SFDC](#)

Enjoy the Compact Case Feed Everywhere in Lightning Experience

Use the compact feed wherever case or social feeds appear in Lightning Experience. You can also configure the compact feed for standard navigation apps or console navigation apps.

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

How: By default, the compact feed is used in the Chatter and Chatter Feed Lightning App Builder components on page layouts for cases and social posts. Previously, the compact feed was available only for cases that used the Chatter component.

The default case and social post page layouts for the Lightning Service Console app already include the Chatter component that leverages the compact feed.

To disable the compact feed for cases and social posts in Lightning Experience, contact Salesforce support.

Work More Efficiently in Your Case Feed in Lightning Experience

The button to collapse or expand all items in the case feed is smarter. Also, the number of feed items loaded is proportional to the size of your screen— a taller window means more feed items load. As you scroll down, more case feed items load automatically. The case feed is now supported in narrow columns of 25% width in the Lightning App Builder, so you can make the most of your screen space.

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

How: Long case feeds scroll for up to five pages of feed posts before prompting the user with a **View More** button. Clicking the button enables infinite scroll for the feed.

Case feeds in columns of 25% screen width display information slightly differently than wider feeds. For example, user avatars aren't displayed in narrow feeds.

Use Visualforce Email Templates in Lightning Experience

Agents save tons of time drafting emails using email templates. Now you can use the power of Visualforce email templates in Lightning Experience. Users insert text, field data, and email attachments into the case email publisher with just a few clicks.

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

How: Create and edit Visualforce email templates in Salesforce Classic. In Lightning Experience, attachments that are dynamically generated from Visualforce email templates automatically become Salesforce Files.

Visualforce email templates aren't supported in macros.

SEE ALSO:

[Apex Developer Guide: QuickActionDefaultsHandler Interface](#)

[Visualforce Developer Guide: Visualforce Email Templates](#)

Share and Preview Files By Automatically Saving Email-to-Case Attachments as Salesforce Files

Attachments to newly received Email-to-Case messages are automatically converted into Salesforce Files. This conversion lets agents conveniently preview without downloading the attachment to their computer. Salesforce Files are searchable and shareable across Salesforce, so agents don't have to navigate to a record's related list to find the file.

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

How: Orgs created after Spring '18 that enable Email-to-Case or On-Demand Email-to-Case automatically have this feature enabled. To enable this feature in an existing org, from Setup, in the Quick Find box, enter *Email-to-Case*, and select **Email-to-Case**. Click **Edit**, and enable **Save Email-to-Case Attachments as Salesforce Files**. Click **Save**.

 **Note:** If anything fails when saving an Email-to-Case attachment as a Salesforce File, the org admin is sent an email notification.

SEE ALSO:

[Idea Exchange: Email to Case Attachments -- Add to Files](#)

Set Audit Fields When Importing Emails

You can now set the audit fields for email message records that are created as part of importing email messages through the API into Salesforce. That way, your records reflect the same audit field details as the original email messages, such as who created the email and when it was created.

Where: This change applies to Enterprise, Unlimited, and Developer editions.

Who: To set the values for newly created email records, you need the `Set Audit Fields upon Record Creation` user permission.

Tip: Audit fields are visible to users with Read permission in Salesforce Classic, Lightning Experience, and the Salesforce app. But you can configure audit fields only through the API and only during record creation.

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: EmailMessage](#)

Fight Spam—Reject Cases Without reCAPTCHA Verification

Stop spammers from sending you bogus cases. Reject cases from Web-to-Case that don't use reCAPTCHA verification.

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

How: In Setup, go to the Web-to-Case Settings page, and look for the Require reCAPTCHA Verification setting. Enabling this setting turns on the Include reCAPTCHA in HTML setting on the Web-to-Case HTML Generator page. Then make sure that the HTML on your website includes the reCAPTCHA code.



In new orgs, Require reCAPTCHA Verification is enabled by default.

Note: If your org already uses reCAPTCHA, manually enable **Require reCAPTCHA Verification**. After enabling this setting, it's important that you ensure the code on your website includes the reCAPTCHA validation code. You might need to regenerate your HTML code and update it on your website. If your website doesn't include the reCAPTCHA code, customers can't submit cases.

SEE ALSO:

[Salesforce Help: Enable reCAPTCHA to Prevent Spam Cases \(can be outdated or unavailable during release preview\)](#)

Omni-Channel: Skills-Based Routing Improvements and Chat Monitoring

Enjoy more flexibility over how Omni-Channel assigns work items in your org. Route work items using both queue-based routing and skills-based routing simultaneously in the same org. Route Live Agent chats to the right agents with skills-based routing (a beta functionality). Support managers can keep an eye on work routed by queues and by skills in Omni-Channel Supervisor. Some Omni-Channel Supervisor tabs have new names to clarify what information they show. Let supervisors monitor chats in progress so that they can help out as needed, and give supervisors a preview of what agents and customers are typing.

IN THIS SECTION:

[Route Work to Agents Using Both Queues and Skills Simultaneously in the Same Org](#)

Try out Omni-Channel skills-based routing in your org while keeping the queue-based routing that you know and love. Omni-Channel gives you the flexibility to route work items to agents in the way that makes the most sense for your company. Route some work items by skills, and route other work items by queues. It's the best of both worlds in the same org!

[Use Skills-Based Routing to Route Chats in Live Agent \(Beta\)](#)

Route Live Agent chats to agents who have the right skills to solve the customer's issue. Omni-Channel gives you the flexibility to route chats in the ways that are best for your company. Route all chats by Omni-Channel skills-based routing. Or, route some chats by queues and others by skills. However, you can't transfer chats that are routed by skills-based routing to another agent, queue, or skill.

[Keep an Eye on Agent Workload for Both Queue-Based and Skills-Based Routing in Omni-Channel Supervisor](#)

Do you use both queue-based routing and skills-based routing in the same org? If so, Omni-Channel Supervisor shows the tabs for both types of routing, letting support managers track agents and work items, regardless of how work is routed. We also renamed some Omni-Channel Supervisor tabs to clarify what information they show. The Queues tab is now called Queues Backlog. We changed the Work tab to Assigned Work, and the Backlog tab now is named Skills Backlog.

[Let Supervisors Monitor Chats in Real Time in Omni-Channel Supervisor](#)

Support supervisors can click **Monitor** in the Omni-Channel Supervisor Agents tab to open a chat window and see the conversation between the agent and the customer. Supervisors can view up to five conversations at the same time.

[Give Supervisors a Sneak Peek into What Agents and Customers Are Typing in Chats](#)

Help supervisors stay on top of messages sent between agents and customers. Supervisors can see what an agent is typing before sending a message with the agent sneak peek feature. Customer sneak peek lets a supervisor see what customers are typing before they hit send.

Route Work to Agents Using Both Queues and Skills Simultaneously in the Same Org

Try out Omni-Channel skills-based routing in your org while keeping the queue-based routing that you know and love. Omni-Channel gives you the flexibility to route work items to agents in the way that makes the most sense for your company. Route some work items by skills, and route other work items by queues. It's the best of both worlds in the same org!

 **Important:** Previously, if you used queue-based routing in your org and you switched to using skills-based routing, Omni-Channel stopped routing work to queues. When Winter '19 is released to your org, Omni-Channel resumes routing work to queues in addition to routing work to skills.

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

Who: Admins need the Customize Application permission to set up Omni-Channel.

How: In Setup, enter *Omni-Channel* in the Quick Find box, and select **Omni-Channel Settings**. Enable Omni-Channel and set up queue-based routing. In the same org, enable and set up skills-based routing.

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 \(can be outdated or unavailable during release preview\)](#)

Use Skills-Based Routing to Route Chats in Live Agent (Beta)

Route Live Agent chats to agents who have the right skills to solve the customer's issue. Omni-Channel gives you the flexibility to route chats in the ways that are best for your company. Route all chats by Omni-Channel skills-based routing. Or, route some chats by queues and others by skills. However, you can't transfer chats that are routed by skills-based routing to another agent, queue, or skill.

Where: Omni-Channel is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

Live Agent is available in Lightning Experience and Salesforce Classic in:

- Performance and Developer editions created after June 14, 2012
- Unlimited Edition with Service Cloud
- Enterprise and Unlimited editions for an additional cost

 **Note:** As a beta feature, skills-based routing for Live Agent chats 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 skills-based routing for Live Agent chats in the IdeaExchange in the Trailblazer Community.

Who: Admins need the Customize Application permission to set up Omni-Channel.

How: Set up queue-based routing and skills-based routing in Omni-Channel. Then create a Live Agent deployment with a chat button with the routing type *Omni-Channel Skills*.

Keep an Eye on Agent Workload for Both Queue-Based and Skills-Based Routing in Omni-Channel Supervisor

Do you use both queue-based routing and skills-based routing in the same org? If so, Omni-Channel Supervisor shows the tabs for both types of routing, letting support managers track agents and work items, regardless of how work is routed. We also renamed some Omni-Channel Supervisor tabs to clarify what information they show. The Queues tab is now called Queues Backlog. We changed the Work tab to Assigned Work, and the Backlog tab now is named Skills Backlog.

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

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 \(can be outdated or unavailable during release preview\)](#)

Let Supervisors Monitor Chats in Real Time in Omni-Channel Supervisor

Support supervisors can click **Monitor** in the Omni-Channel Supervisor Agents tab to open a chat window and see the conversation between the agent and the customer. Supervisors can view up to five conversations at the same time.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

Who: Admins need the Customize Application permission to configure Omni-Channel Supervisor.

How: From Setup, enter *Omni-Channel* in the Quick Find box, then select **Supervisor Settings**. Select **Conversation monitoring**, and click **Save**.

SEE ALSO:

[Salesforce Help: Omni-Channel Supervisor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Monitor Agent Chats in Omni-Channel Supervisor \(can be outdated or unavailable during release preview\)](#)

Give Supervisors a Sneak Peek into What Agents and Customers Are Typing in Chats

Help supervisors stay on top of messages sent between agents and customers. Supervisors can see what an agent is typing before sending a message with the agent sneak peek feature. Customer sneak peek lets a supervisor see what customers are typing before they hit send.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

Who: Admins need the Customize Application permission to configure Omni-Channel Supervisor.

How: From Setup, enter *Omni-Channel* in the Quick Find box, then select **Supervisor Settings**. Choose which options you want, and click **Save**.

SEE ALSO:

[Salesforce Help: Omni-Channel Supervisor \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Monitor Agent Chats in Omni-Channel Supervisor \(can be outdated or unavailable during release preview\)](#)

Agent Productivity: Folders and Sharing and Buttons, Oh My

Organize macros and quick text in folders to easily find what you're looking for. Share entire folders to give other users easy access to macros or quick text. New buttons make inserting quick text easier and more visible to encourage users to take advantage of this time-saving tool.

IN THIS SECTION:

[Share and Organize Macros and Quick Text in Folders](#)

Keeping track of lots of macros and quick text can be hard, so we made it easier to organize these time-saving tools into logical groups. When you enable folders for macros and quick text, you also allow your users to share them with other people. Previously, you could only share macros and quick text in Salesforce Classic.

[Click Away—Insert Quick Text into Your Emails with a Button](#)

Inserting predefined messages is now just a click away. A new button in the Email action toolbar visually reminds users of this time-saving tool. Previously, you could only insert quick text using a keyboard shortcut.

[Use Quick Text in Tasks and Events](#)

Do your users have many tasks or events that are all the same? Then we have good news. Tasks and events now support quick text. Users can insert quick text to enter common descriptions like "Follow up with customer for more details" or "Verify customer address" instead of repeatedly typing out the same message.

[Insert Quick Text in Knowledge Articles and Chat](#)

You can insert quick text when creating and editing Knowledge articles or responding to customers in chat. Just look for the quick text button in the rich-text editor toolbar.

Never Forget Quick Text Again Thanks to a Popup Button

Quick text is an appreciated time-saving tool. Agents can insert predefined messages into all sorts of text fields. To remind agents of this easier way to insert text, a popup button displays next to text fields that support quick text. Previously, you could insert quick text only using a keyboard shortcut.

Share and Organize Macros and Quick Text in Folders

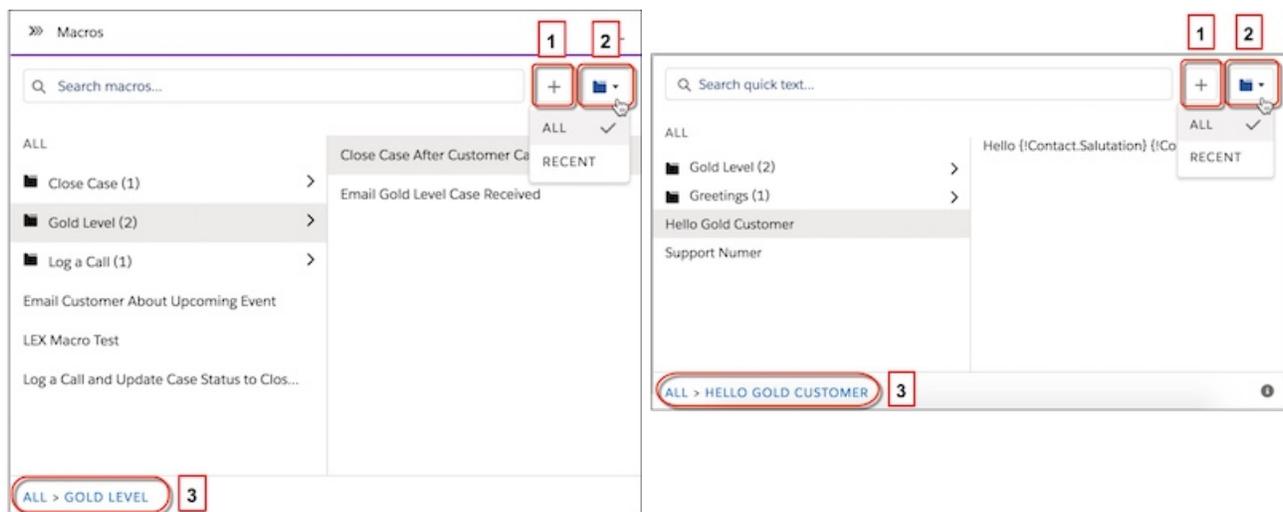
Keeping track of lots of macros and quick text can be hard, so we made it easier to organize these time-saving tools into logical groups. When you enable folders for macros and quick text, you also allow your users to share them with other people. Previously, you could only share macros and quick text in Salesforce Classic.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions. Folders for macros and quick text aren't supported in Essentials.

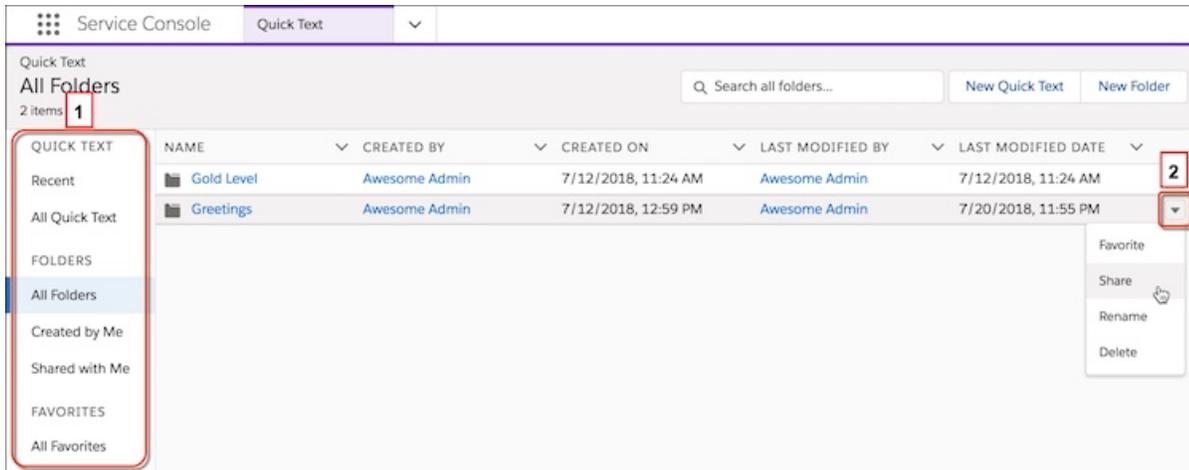
Who: To create a folder for macros or quick text, a user needs Create permission on the object. To share a folder for macros or quick text, a user must be the owner of the folder or have Manage access on the folder. Admins and other users with Modify All permission on the macros or quick text object, can also manage folders.

Why: Folders help spread productivity. Say that a user is a whiz at macros and created a bunch to work with cases about a certain product. That user can share those macros with others using a folder—now all your agents are macro wizards!

Here's what users can do in the updated browsers. Create items right in the utility or browser (1). Change the view to see all folders or recent items (2). Navigate using the folder path breadcrumbs at the bottom (3).

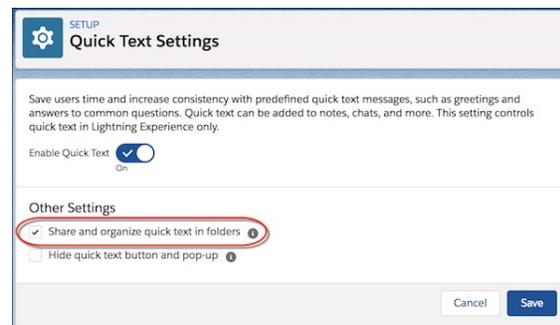
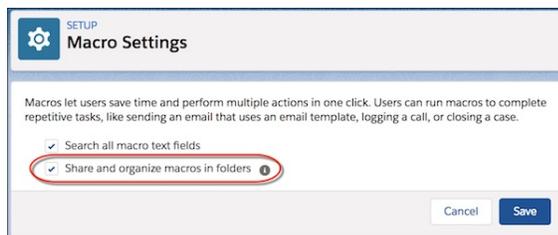


When folders are enabled for macros and quick text, the object home displays a folder view instead of a list view. Users can view all folders, only the ones that they created, or ones that were shared with them (1). To share a folder, use the dropdown menu next to the folder, and click **Share** (2).



Users can create up to 3 subfolders in a folder, and subfolders can contain a mix of folders or individual items. However, you can only share the first-level folder, called the root folder. Subfolders can't be shared.

How: Enable folders for macros and quick text on the Macro Settings and Quick Text Settings pages in Setup. After you enable folders, the macro utility and quick text browser are updated.



Important: Sharing settings on folders override sharing settings on individual items. If you shared macros and quick text in Salesforce Classic, those settings are ignored after this preference is enabled. After enabling this preference, we recommend that you move existing items into folders and share those folders with your users. If an item isn't in a folder, only the owner, creator, and admin have access. If you decide to disable this preference later, folder sharing is ignored and individual sharing settings apply.

Keep the following in mind when enabling folders.

- For new orgs, the Folder field is added to the macro and quick text page layouts by default. For orgs created before Winter '19, add the Folder field to these layouts manually.
- To create and manage quick text and macros, give your users create, edit, and delete permission on the quick text and macros objects using a permission set or through their profile.
- We recommend that you don't use split view for macros and quick. After folders are enabled, split view displays the folder list view, which isn't optimized for split view.

- You can use the API to configure and manage your macros and quick text folders, just like you do for reports and dashboards. See the [Analytics Folders API Resource Reference](#).

SEE ALSO:

[Salesforce Help: Work with Service Cloud Productivity Tools \(can be outdated or unavailable during release preview\)](#)

Click Away—Insert Quick Text into Your Emails with a Button

Inserting predefined messages is now just a click away. A new button in the Email action toolbar visually reminds users of this time-saving tool. Previously, you could only insert quick text using a keyboard shortcut.

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

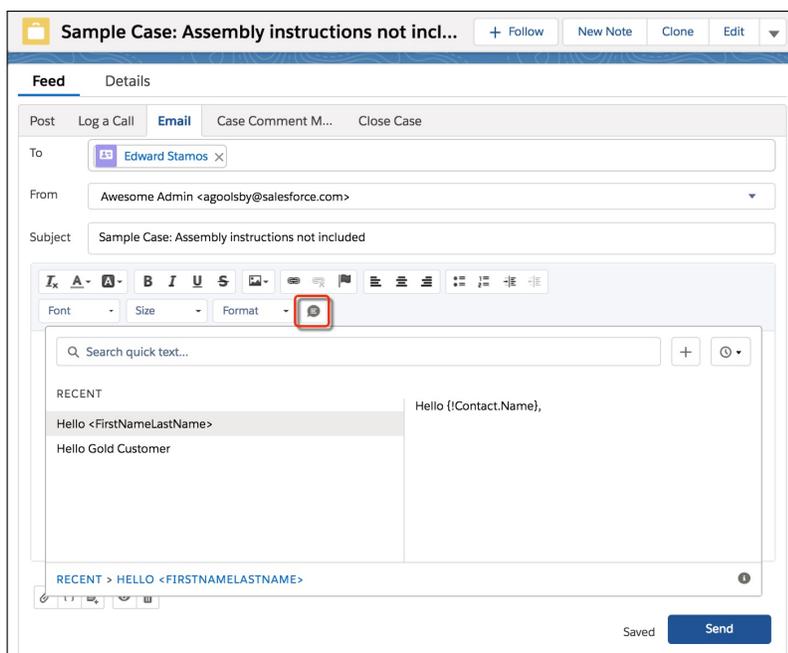
Who: To insert quick text, users need Read permission on the quick text object. Optionally, you can also give users Create, Edit, and Delete access so that they can create and manage their own quick text.

In orgs created after Spring '18, all user profiles include Read access by default. However, users with a Salesforce Platform user license can't work with quick text. If you gave your users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

Why: Agents often save predefined messages in Word or Notepad that they keep open alongside Salesforce. Quick text saves agents from context switching and keeps them in Salesforce where they can avoid the tedious copy, paste, and customize tasks they had to perform before.

How: Quick text in Lightning Experience is enabled by default in all orgs. If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience.

When you create or edit a quick text, set the Channel field to Email. Then look for the new quick text button when creating your emails.



Tip: Sales reps also see the quick text button when emailing accounts and contacts.

The quick text button is also available for List Email.

Note:

- Quick text works with the Salesforce Merge Language (SML) used in Salesforce Classic email templates. It does not work with the Handlebars Merge Language (HML) used in Lightning Experience email templates.
- In email actions that use a text body, the quick text popup button displays instead.

SEE ALSO:

[Salesforce Help: Create Quick Text Messages \(can be outdated or unavailable during release preview\)](#)

Use Quick Text in Tasks and Events

Do your users have many tasks or events that are all the same? Then we have good news. Tasks and events now support quick text. Users can insert quick text to enter common descriptions like “Follow up with customer for more details” or “Verify customer address” instead of repeatedly typing out the same message.

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

Who: To insert quick text, users need Read permission on the quick text object. Optionally, you can also give users Create, Edit, and Delete access so that they can create and manage their own quick text.

In orgs created after Spring '18, all user profiles include Read access by default. However, users with a Salesforce Platform user license can't work with quick text. If you gave your users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

How: Quick text in Lightning Experience is enabled by default in all orgs. If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience.

When you create or edit a quick text, set the Channel field to **Task** or **Event**. A quick text button appears when you put your cursor in a supported field for quick text.

In tasks, check out the Comments field.

In events, check out the Description field.

Sales reps can also use quick text for tasks and events.

 **Note:** To disable this popup button, go to the Quick Text Settings page in Setup, and select **Hide quick text button and popup**.

SEE ALSO:

[Salesforce Help: Create Quick Text Messages \(can be outdated or unavailable during release preview\)](#)

Insert Quick Text in Knowledge Articles and Chat

You can insert quick text when creating and editing Knowledge articles or responding to customers in chat. Just look for the quick text button in the rich-text editor toolbar.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. For more information, review the linked topics.

SEE ALSO:

[Use Quick Text in Your Knowledge Articles](#)

[Use a Button to Insert Quick Text into Your Chats](#)

Never Forget Quick Text Again Thanks to a Popup Button

Quick text is an appreciated time-saving tool. Agents can insert predefined messages into all sorts of text fields. To remind agents of this easier way to insert text, a popup button displays next to text fields that support quick text. Previously, you could insert quick text only using a keyboard shortcut.

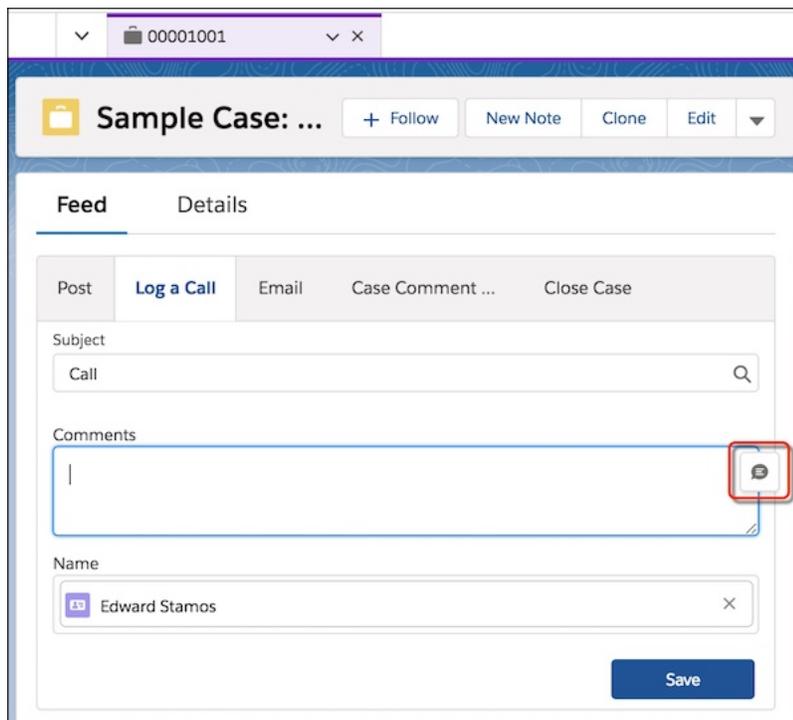
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: To insert quick text, users need Read permission on the quick text object. Optionally, you can also give users Create, Edit, and Delete access so that they can create and manage their own quick text.

In orgs created after Spring '18, all user profiles include Read access by default. However, users with a Salesforce Platform user license can't work with quick text. If you gave your users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

How: Quick text in Lightning Experience is enabled by default in all orgs. If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience. The popup button is also enabled by default.

A quick text popup button appears when you put your cursor in a supported field for quick text on the following actions: Log a Call, Social, Email (with Text Body), Event, and Task.



 **Note:** To disable this popup button, go to the Quick Text Settings page in Setup, and select **Hide quick text button and popup**.

SEE ALSO:

[Salesforce Help: Enable Quick Text \(can be outdated or unavailable during release preview\)](#)

Service Cloud for Mobile: Localization and Chatter Mentions

Android and iOS versions of Service Cloud Mobile update to version 1.1.0. This update brings localization to match the default language in your org and improvements to Chatter mentions. And the Android version catches up with the iOS version, with support for quick actions based on object page layouts and the file picker for posting Salesforce Files in the case feed.

IN THIS SECTION:[Work in Your Org's Language with Mobile Localization](#)

Service Cloud Mobile is now localized for your org's default language. The app supports all 18 of the fully supported languages.

[Communicate Intuitively with Mobile Mentions](#)

Mention people and groups when posting to the case feed. Previously, you could mention users or groups only by commenting on an existing feed post.

[Customize Quick Actions with Page Layouts \(Android\)](#)

Your users can now use quick actions that are part of the page layout for records that they view in the app. Previously, only the iOS version loaded quick actions based on page layouts.

[Post Files to the Case Feed \(Android\)](#)

The case feed gets more robust, adding the ability to post Salesforce Files to the case feed. Previously, posting files was available only in the iOS version.

Work in Your Org's Language with Mobile Localization

Service Cloud Mobile is now localized for your org's default language. The app supports all 18 of the fully supported languages.

Where: This change applies to all Service Cloud Mobile app users.

When: Service Cloud Mobile 1.1.0 is available from the Play Store the week of September 17, 2018.

SEE ALSO:

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

Communicate Intuitively with Mobile Mentions

Mention people and groups when posting to the case feed. Previously, you could mention users or groups only by commenting on an existing feed post.

Where: This change applies to all Service Cloud Mobile app users.

When: Service Cloud Mobile 1.1.0 is available from the Play Store the week of September 17, 2018.

Customize Quick Actions with Page Layouts (Android)

Your users can now use quick actions that are part of the page layout for records that they view in the app. Previously, only the iOS version loaded quick actions based on page layouts.

Where: This change applies to Service Cloud Mobile Android app users.

When: Service Cloud Mobile 1.1.0 is available from the Play Store the week of September 17, 2018.

Post Files to the Case Feed (Android)

The case feed gets more robust, adding the ability to post Salesforce Files to the case feed. Previously, posting files was available only in the iOS version.

Where: This change applies to Service Cloud Mobile Android app users.

When: Service Cloud Mobile 1.1.0 is available from the Play Store the week of September 17, 2018.

Knowledge: Expanded Features for Lightning Knowledge and More Options to Manage Articles

More Salesforce Classic features have expanded to Lightning Knowledge. Do more from the Articles related list on cases, get more done on article list views, and customize articles with actions, buttons, and links. In addition, customize global search for Knowledge data, add lookup fields to article versions, import articles with translations, and migrate more to Lightning Knowledge.

IN THIS SECTION:

[Lightning Knowledge Is Included in Service Essentials](#)

With no add-on fees, add a powerful and affordable knowledge solution to your org. Write articles and manage your knowledge base with Lightning Knowledge in Service Essentials Edition. Service Cloud Essentials is designed for small businesses looking to build a CRM-based customer service experience.

[Map Case Fields to Data Categories for Better Search Results](#)

Make suggested articles and Knowledge component searches more relevant when solving cases in Lightning Knowledge. Similar to Salesforce Classic, you can map case fields to data categories so that the Knowledge component is automatically filtered to show articles that have those categories mapped to the fields on cases.

[Get More Done on Article List Views with Mass Actions](#)

Edit up to 100 articles with just a few clicks. Mass actions on article list views let agents do things like batch publish relevant articles after a press release or mass assign draft articles to another person. Publish and assign are new standard actions available for article lists.

[Insert Anchor Links in Rich Text Fields to Help Readers](#)

Add anchor links to the rich text fields in your articles to help readers go to different sections. Anchors remain in revised or published articles in Lightning Knowledge, and the links don't break. Create and name multiple anchors for each rich text field, and easily spot and use links in articles in communities, Snap-ins, and the Salesforce app.

[Customize Articles with Actions, Buttons, and Links \(Beta\)](#)

Create custom buttons and links to help agents in Lightning Knowledge interact with Salesforce data and external services, such as online maps or websites unique to your business. Add four action types to let agents do various tasks from articles: create a record, update a record, start a flow action, and trigger a Lightning component action. For update a record actions, the button appears only in record home pages for draft articles and in the Knowledge object home list view when draft is the publish status.

[Add Lookup Fields to Article Versions from Various Records](#)

Look up a Lightning Knowledge article version on a specific record, such as a lead or custom object, to link the two records together. When a new article version is published, the lookup relationship you created stays connected to that version. You can check the specific article that converted a lead to an opportunity or view the article that's the parent record to custom object records.

[Do More from the Articles Related List on Cases](#)

In Lightning Knowledge, agents can now publish and delete articles, refresh the articles list, and show actions when configured like **Edit**, **Detach**, **Edit as Draft**, and **Insert Article to Email**. Agents can access these actions only if they have the right permissions. Previously, agents could only do these things from the Articles related list on cases in Salesforce Classic.

[Customize Global Search to Find the Most Relevant Knowledge Data](#)

Configure global search to include Lightning Knowledge fields in search results and filter options. Because this update applies to Lightning Experience, Salesforce Knowledge fields in the Knowledge sidebar, Knowledge tab, Articles tab, or Article Management are unavailable for search results and filter customization. If you configure search filters, Lightning Advanced Search filters for Knowledge in global search don't change.

[Import Articles with Translations to Leave No Languages Behind](#)

In Lightning Knowledge, you can import articles with translations and specify the record type for the master article and its translations in the article import tool. Now you no longer have to add record types on each article translation after import.

[Move More to Lightning Knowledge—Communities Topics and Article Search Data \(Beta\)](#)

The Lightning Migration Knowledge tool takes the guesswork out of moving from Salesforce Knowledge to the new Lightning Knowledge data model. Follow the tool's prompts to unify your data under a powerful new Knowledge object and to use Knowledge with the Lightning Experience user interface. During the migration process, if your org has any related cases, data categories, communities topics, work order items, field service work orders—or report data for article views, votes, or searches—those items work properly after the migration.

[Translate Articles Faster with Helpful Links in Emails and Evenly Spaced Columns on Pages](#)

Send assigned translators email notifications with direct links to articles in Lightning Knowledge, Salesforce Knowledge, or both depending on your org's setup. Also, see master articles evenly spaced side by side with translated articles for quick comparison using a new custom record page template.

[Access Smart Links in Articles from the Salesforce App](#)

Smart Links now appear in the body of articles in the Salesforce app, and you can click them in rich text fields to navigate content on the go. Agents can confidently open Lightning Knowledge articles from their mobile devices and also view smart links. Smart links automatically adjust when the name or URL of an article is changed.

[Stay in Lightning Knowledge to Insert Article Content into Emails](#)

With communication channel mapping available in setup for Lightning Knowledge, it's now possible to help agents embed article content into the body of customer emails. You no longer have to switch to Salesforce Classic to set up which article fields to use in channels or article record types—you can choose them directly in Lightning Experience.

[Use Quick Text in Your Knowledge Articles](#)

Save your agents from copying and pasting information that is repeatedly added to Knowledge articles. Let them use quick text to insert predefined text into articles. Agents can create quick text for answers to common questions, support contact information, like a phone number or website, and much more.

Lightning Knowledge Is Included in Service Essentials

With no add-on fees, add a powerful and affordable knowledge solution to your org. Write articles and manage your knowledge base with Lightning Knowledge in Service Essentials Edition. Service Cloud Essentials is designed for small businesses looking to build a CRM-based customer service experience.

Where: This change applies to Lightning Knowledge in Essentials Edition of Service Cloud.

Who: Service Essentials license holders can use Lightning Knowledge. For more details, contact your Salesforce representative. Lightning Knowledge is available to all users.

Map Case Fields to Data Categories for Better Search Results

Make suggested articles and Knowledge component searches more relevant when solving cases in Lightning Knowledge. Similar to Salesforce Classic, you can map case fields to data categories so that the Knowledge component is automatically filtered to show articles that have those categories mapped to the fields on cases.

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, and Performance editions as an add-on.

How: To set up category mapping, choose which case fields map to which data categories. Add a default data category for cases that have no value for the mapped fields.

1. From Setup, enter *Data Category Mappings* in the **Quick Find** box, then select **Data Category Mappings**.

2. In the Case Field column, use the dropdown list to add a field.
3. In the Data Category Group column, use the dropdown list to map the information from the lookup field to a data category.
4. In the Default Data Category column, use the dropdown list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

SEE ALSO:

[Salesforce Help: Filter Articles with Data Category Mapping \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Use the Knowledge Component in the Lightning Service Console \(can be outdated or unavailable during release preview\)](#)

Get More Done on Article List Views with Mass Actions

Edit up to 100 articles with just a few clicks. Mass actions on article list views let agents do things like batch publish relevant articles after a press release or mass assign draft articles to another person. Publish and assign are new standard actions available for article lists.

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, and Performance editions as an add-on.

Who: Agents who have the appropriate permissions to read, edit, delete, publish, or publish translated articles.

Insert Anchor Links in Rich Text Fields to Help Readers

Add anchor links to the rich text fields in your articles to help readers go to different sections. Anchors remain in revised or published articles in Lightning Knowledge, and the links don't break. Create and name multiple anchors for each rich text field, and easily spot and use links in articles in communities, Snap-ins, and the Salesforce app.

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, and Performance editions as an add-on.

Customize Articles with Actions, Buttons, and Links (Beta)

Create custom buttons and links to help agents in Lightning Knowledge interact with Salesforce data and external services, such as online maps or websites unique to your business. Add four action types to let agents do various tasks from articles: create a record, update a record, start a flow action, and trigger a Lightning component action. For update a record actions, the button appears only in record home pages for draft articles and in the Knowledge object home list view when draft is the publish status.

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, and Performance editions as an add-on.

 **Note:** As a beta feature, customizing articles with actions buttons, and links 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:

[Salesforce Help: Provide Actions, Buttons, and Links \(can be outdated or unavailable during release preview\)](#)

[Flow Actions Now Supported for Articles](#)

Add Lookup Fields to Article Versions from Various Records

Look up a Lightning Knowledge article version on a specific record, such as a lead or custom object, to link the two records together. When a new article version is published, the lookup relationship you created stays connected to that version. You can check the specific article that converted a lead to an opportunity or view the article that's the parent record to custom object records.

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, and Performance editions as an add-on.

SEE ALSO:

[Salesforce Help: Lookup Relationship Fields on External Objects \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: External Object Relationships \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Custom Field Types \(can be outdated or unavailable during release preview\)](#)

Do More from the Articles Related List on Cases

In Lightning Knowledge, agents can now publish and delete articles, refresh the articles list, and show actions when configured like **Edit**, **Detach**, **Edit as Draft**, and **Insert Article to Email**. Agents can access these actions only if they have the right permissions. Previously, agents could only do these things from the Articles related list on cases in Salesforce Classic.

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, and Performance editions as an add-on.

SEE ALSO:

[Salesforce Help: Customize Related Lists \(can be outdated or unavailable during release preview\)](#)

Customize Global Search to Find the Most Relevant Knowledge Data

Configure global search to include Lightning Knowledge fields in search results and filter options. Because this update applies to Lightning Experience, Salesforce Knowledge fields in the Knowledge sidebar, Knowledge tab, Articles tab, or Article Management are unavailable for search results and filter customization. If you configure search filters, Lightning Advanced Search filters for Knowledge in global search don't change.

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, and Performance editions as an add-on.



Note: Data categories aren't available in search filters.

SEE ALSO:

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

Import Articles with Translations to Leave No Languages Behind

In Lightning Knowledge, you can import articles with translations and specify the record type for the master article and its translations in the article import tool. Now you no longer have to add record types on each article translation after import.

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, and Performance editions as an add-on.

SEE ALSO:

[Salesforce Help: Prepare Articles for Import to Salesforce Knowledge \(can be outdated or unavailable during release preview\)](#)

Move More to Lightning Knowledge—Communities Topics and Article Search Data (Beta)

The Lightning Migration Knowledge tool takes the guesswork out of moving from Salesforce Knowledge to the new Lightning Knowledge data model. Follow the tool's prompts to unify your data under a powerful new Knowledge object and to use Knowledge with the Lightning Experience user interface. During the migration process, if your org has any related cases, data categories, communities topics, work order items, field service work orders—or report data for article views, votes, or searches—those items work properly after the migration.

 **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 manually revises customizations to use the new Knowledge object.

SEE ALSO:

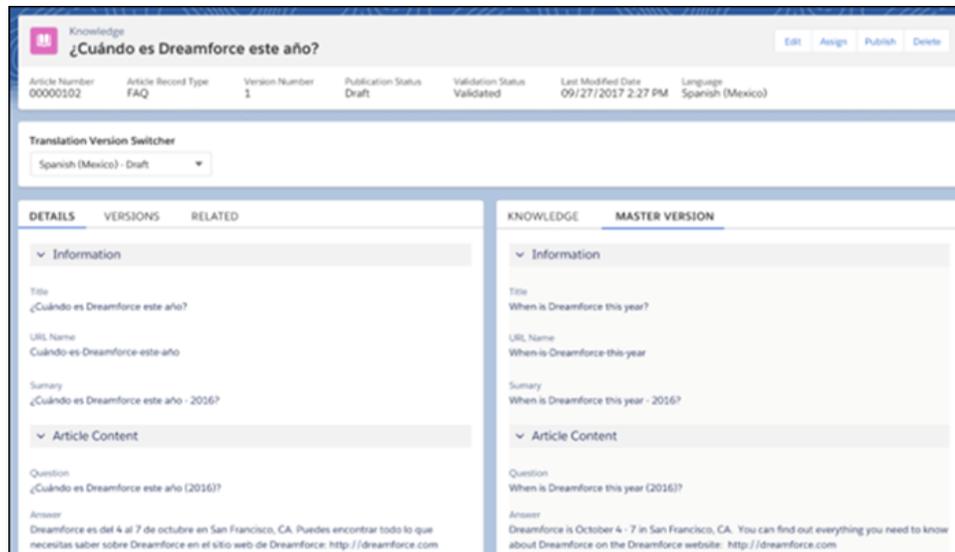
[Salesforce Help: Lightning Knowledge Migration Tool \(Beta\) \(can be outdated or unavailable during release preview\)](#)

Translate Articles Faster with Helpful Links in Emails and Evenly Spaced Columns on Pages

Send assigned translators email notifications with direct links to articles in Lightning Knowledge, Salesforce Knowledge, or both depending on your org's setup. Also, see master articles evenly spaced side by side with translated articles for quick comparison using a new custom record page template.

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, and Performance editions as an add-on.

How: Admins add the Master Article Component to the new Header and Two Equal Columns record page template using the Lightning App Builder.



SEE ALSO:

[Salesforce Help: Set Up Master Article and Translation Side-By-Side View \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Translate Articles in Lightning Knowledge \(can be outdated or unavailable during release preview\)](#)

Access Smart Links in Articles from the Salesforce App

Smart Links now appear in the body of articles in the Salesforce app, and you can click them in rich text fields to navigate content on the go. Agents can confidently open Lightning Knowledge articles from their mobile devices and also view smart links. Smart links automatically adjust when the name or URL of an article is changed.

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, and Performance editions as an add-on.

SEE ALSO:

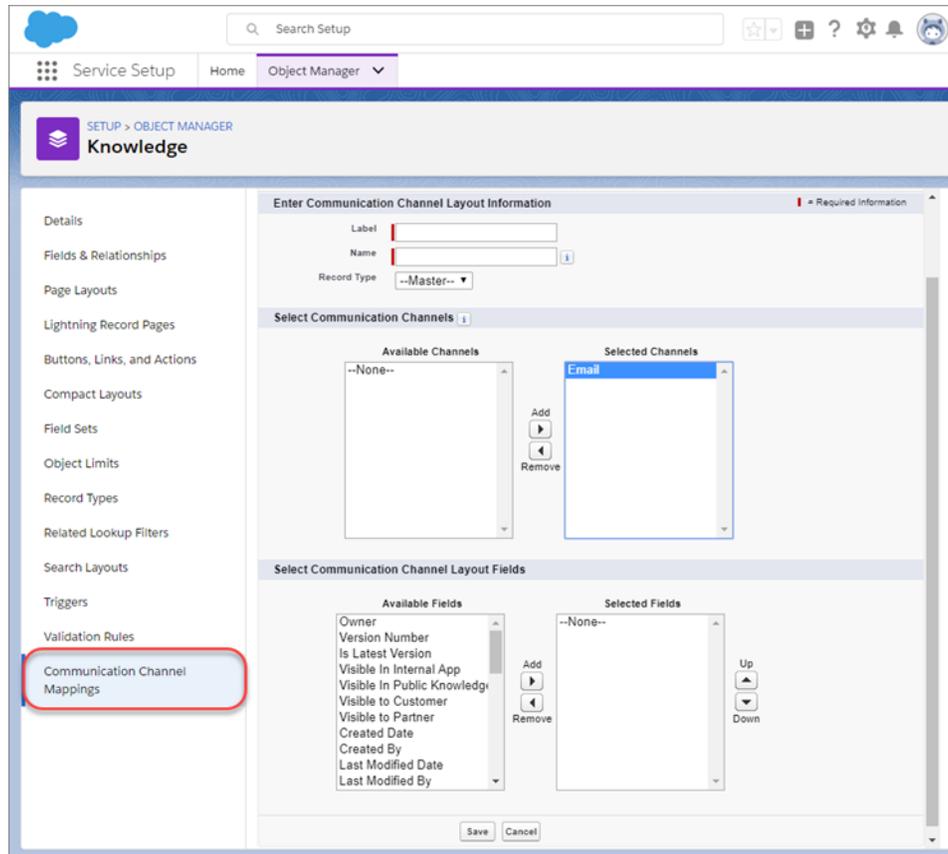
[Salesforce Help: Smart Links to Salesforce Knowledge Articles \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Insert Smart Links into Articles in Lightning Knowledge \(can be outdated or unavailable during release preview\)](#)

Stay in Lightning Knowledge to Insert Article Content into Emails

With communication channel mapping available in setup for Lightning Knowledge, it's now possible to help agents embed article content into the body of customer emails. You no longer have to switch to Salesforce Classic to set up which article fields to use in channels or article record types—you can choose them directly in Lightning Experience.

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, and Performance editions as an add-on.



SEE ALSO:

[Salesforce Help: Insert Article Content into Emails \(can be outdated or unavailable during release preview\)](#)

Use Quick Text in Your Knowledge Articles

Save your agents from copying and pasting information that is repeatedly added to Knowledge articles. Let them use quick text to insert predefined text into articles. Agents can create quick text for answers to common questions, support contact information, like a phone number or website, and much more.

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, and Performance editions as an add-on.

Who: To insert quick text, agents need Read permission on the quick text object. Optionally, you can also give users Create, Edit, and Delete access so that they can create and manage their own quick text.

In orgs created after Spring '18, all user profiles include Read access by default. However, users with a Salesforce Platform user license can't work with quick text. If you gave your users permission to create, read, update, and delete quick text in Salesforce Classic, that permission is honored in Lightning Experience.

How: Quick text in Lightning Experience is enabled by default in all orgs. If you enabled and created quick text in Salesforce Classic, your messages work in Lightning Experience.

When you create or edit a quick text, set the Channel field to **Knowledge**. Then look for the new quick text button when editing or creating your Knowledge article.

The screenshot shows the 'New Knowledge' form in Salesforce. The form is titled 'New Knowledge' and has a tab labeled 'New Knowledge'. It features a rich text editor with a toolbar containing various formatting options. A red box highlights the 'Quick Text' icon in the toolbar. Below the editor are fields for 'Title' and 'URL Name', and buttons for 'Cancel', 'Save & New', and 'Save'.

 **Tip:** You can also use a keyboard shortcut to insert quick text. Press Command+. on macOS or Ctrl+. on Windows.

Keep the following things in mind.

- To use quick text with Lightning Knowledge, set the Channel field on the quick text record to **Knowledge**.
- Merge fields in quick text aren't supported for Lightning Knowledge.
- Quick text is supported only in rich-text fields for Lightning Knowledge.

SEE ALSO:

[Salesforce Help: Create Quick Text Messages \(can be outdated or unavailable during release preview\)](#)

Setup Flows: Bring Your Service to the Next Level

Our guided setup flows make it easy to get started with more service features, letting you continue to provide your customers with stellar support. There are new setup flows for LiveMessage and Help Center that you can access depending on your edition. There are some updates to the Email-to-Case and Lightning Communities setup flows.

Where: The LiveMessage and Lightning Communities setup flows are available in Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. The Help Center setup flow is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud. The Email-to-Case setup flow is available in all editions with the Service Cloud.

Why: Setup flows let you spend less time in Setup and more time using and customizing Service Cloud features.

The LiveMessage setup flow adds SMS text messaging and Facebook Messenger to your service channels.

The Help Center setup flow creates a self-service page where you customers can browse articles and contact you for help.

Set Up Help Center

Help your customers help themselves

Give your customers the answers they're looking for. Customers can search for and read articles and contact your support team to resolve issues. Your articles can cover various topics, such as products, customer locations, or FAQs.



We'll help you get up and running. Here's what you'll do:

1. Create a domain, URL, and name for your help center
2. Create article topics
3. Select your article author
4. Make a contact form to let your customers reach you when their questions aren't answered

[Start](#)

In the Email-to-Case setup flow, we changed where you add your support email address. You can go back and edit values if you change your mind. We also resend the verification email when you enter an email address that's registered with us but unverified, in case you missed it the first time.

Add Email-To-Case Address

Select your email provider

"If you please, please provide your provider..."

* Support Email Address



Gmail



Other

Progress indicator: 1 of 5 steps completed. Next button.

In the Lightning Communities setup flow, we added a screen where you can create a contact form for your community.

Create Your Community

Let customers contact you

Create a contact form so your customers can reach out when their questions aren't answered.

GUEST USER
LOGGED-IN USER

Users who haven't registered or signed into your community see this form.

DISPLAYED FIELDS	REQUIRED			
Subject	<input type="checkbox"/>	↑	↓	×
Description	<input type="checkbox"/>	↑	↓	×
Web Email	<input type="checkbox"/>	↑	↓	×

[Add a Field](#)

Back

●
●
●
●

Next

SEE ALSO:

[Set Up LiveMessage with a Guided Setup Flow](#)

[Let Customers Be Self-Sufficient with Help Center](#)

[Salesforce Help: Set Up Email-to-Case with a Guided Setup Flow \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Lightning Communities with a Guided Setup Flow \(can be outdated or unavailable during release preview\)](#)

Analytics: Reports and Dashboards and Einstein Analytics

Drive decisions with insights from reports and dashboards and Einstein Analytics. Drill down in Lightning Experience reports to get the details behind the numbers. Create Einstein Analytics assets with templates, enhanced sharing security, file-based data connectors, and much more.

IN THIS SECTION:

[Reports and Dashboards: Drill into Your Data, Edit Joined Reports \(Beta\) with the Lightning Experience Report Builder, Subscription Expansion](#)

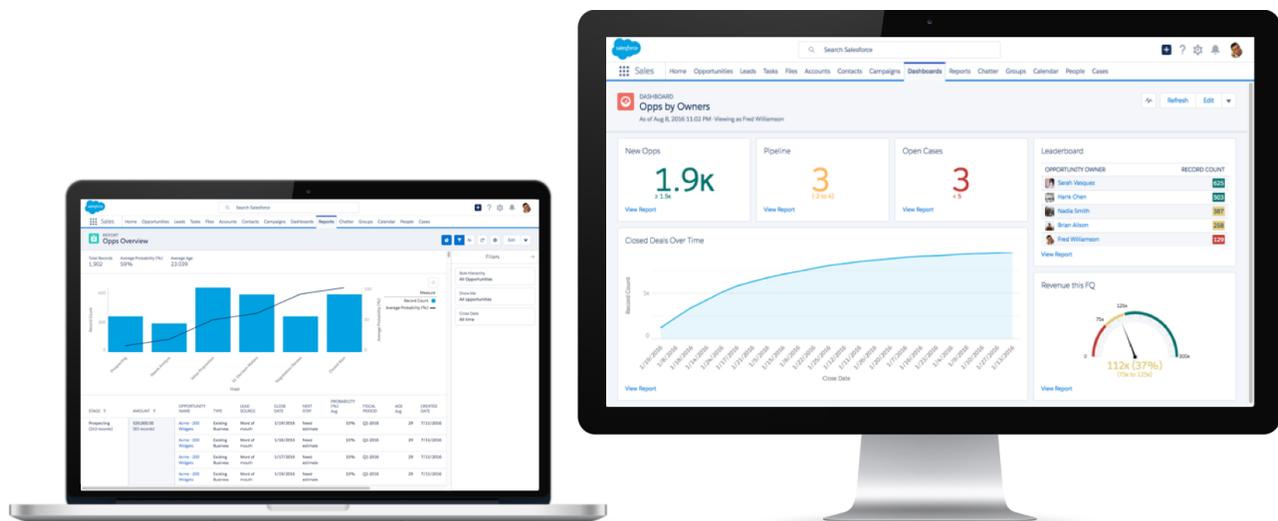
Drill into your data right from the Enhanced Report run page (beta). Edit joined reports (beta) using the Lightning Experience report builder. Dashboards feature customizable ranges, decimal precision, and joined reports as source reports. Smarter subscribe options for reports and dashboards.

[Einstein Analytics: Templates, File-Based Connectors, Sharing Inheritance](#)

Take the fast track to apps with Analytics Templates. Create entire dashboards populated with your own data using smart dashboard templates. Bring in more third-party data by connecting directly to Amazon S3 buckets. Take control of sharing with enhanced sharing security based on core sharing rules.

Reports and Dashboards: Drill into Your Data, Edit Joined Reports (Beta) with the Lightning Experience Report Builder, Subscription Expansion

Drill into your data right from the Enhanced Report run page (beta). Edit joined reports (beta) using the Lightning Experience report builder. Dashboards feature customizable ranges, decimal precision, and joined reports as source reports. Smarter subscribe options for reports and dashboards.



IN THIS SECTION:

[Reports: Einstein Data Insights \(GA\), Enhanced Run Page Improvements \(Beta\), Drill into Your Data, Edit Joined Reports with the Lightning Experience Report Builder \(Beta\)](#)

The second beta release of the enhanced run page report is available to all users. It brings many powerful features to report readers, such as grouping report data and toggling the visibility of detail rows. Drill into your data to get more information. As part of the Lightning joined reports beta, edit joined reports with the Lightning Experience report builder.

[Dashboards: More Filter Values, Joined Reports as Source Reports, Custom Axis Ranges and Decimal Precision](#)

Shine a light on data with dashboards that feature up to 50 values per filter, data from joined reports, custom ranges for chart axes, and numbers that show up to five decimal places.

[Subscriptions and Folders: Expanded Subscription Options, Quick Search, Folder Enhancements](#)

Add other people as subscribers to your reports and dashboards so that you can share the latest information automatically on a set schedule. Search for reports, dashboards, and folders from the Reports and Dashboards tab.

[Other Reports and Dashboards Enhancements](#)

In addition to this release's major features, we're continuing to improve your experience with reports and dashboards.

Reports: Einstein Data Insights (GA), Enhanced Run Page Improvements (Beta), Drill into Your Data, Edit Joined Reports with the Lightning Experience Report Builder (Beta)

The second beta release of the enhanced run page report is available to all users. It brings many powerful features to report readers, such as grouping report data and toggling the visibility of detail rows. Drill into your data to get more information. As part of the Lightning joined reports beta, edit joined reports with the Lightning Experience report builder.

IN THIS SECTION:

[Einstein Data Insights: Learn More from Your Reports \(Generally Available\)](#)

Einstein Data Insights extends your reports with AI to help you discover new and useful insights about your data.

[Edit Joined Reports with Lightning Report Builder \(Beta\)](#)

Enhance your joined report workflow by editing joined reports with the Lightning report builder and with more run page functionality including filtering and sorting.

[Enjoy a Better Interface with Enhanced Run Page \(Beta\)](#)

We streamlined the enhanced run page interface to save you time and a few clicks.

[Draw Insights Quicker by Drilling into Your Data](#)

Take a closer look at records in a summary or matrix report without editing it. The drill-down feature for primary row groupings makes its debut in the enhanced run page (beta).

[Choose the Currency for a Report](#)

If your org has an international clientele, chances are some of your users want the option to review the financial data in other currencies. Lightning report builder lets users set the currency on a report.

[Role Hierarchy Filter Requires a Role Selection](#)

When applying a role hierarchy filter to a report in Lightning Experience, you now need to specify a role from the hierarchy. Once you select a role, the report is filtered to show records owned by users in that role and those rolling up to that role. If you previously saved a report without selecting a role, the report is filtered by your role when you run it.

Einstein Data Insights: Learn More from Your Reports (Generally Available)

Einstein Data Insights extends your reports with AI to help you discover new and useful insights about your data.

Where: This change applies to Einstein Analytics in Lightning Experience. Einstein Analytics and Einstein Data Insights are available for an extra cost in Enterprise, Performance, and Unlimited Editions. Also available in Developer Edition.

Who: To view an insight, you need the **Can Run Einstein Data Insights** user permission that is included in the Einstein Analytics Plus license.

How: You run Einstein Data Insights to further analyze your report results. In your Salesforce org:

1. Run a report.
2. To start an analysis, click **Einstein Data Insights** to start analyzing report data. After a moment, Einstein presents you with an analysis based on how often items appear in your report.

Help Desk Report						
	Owner Name OLD	TicketType	FiledAgainst	Priority	Severity	days
1	Tianna Bryden	Request	Access/Login	1 - Low	2 - Normal	
2	Daniilo Rust	Request	Access/Login	1 - Low	2 - Normal	
3	Cristopher Archibald	Request	Software	0 - Unassigned	2 - Normal	
4	Sherman Adelson	Issue	Access/Login	0 - Unassigned	3 - Major	
5	Tenisha Binger	Issue	Software	2 - Medium	2 - Normal	
6	Avery Swaim	Issue	Systems	3 - High	2 - Normal	
7	Velva Benham	Issue	Access/Login	3 - High	2 - Normal	
8	Merlene Sgro	Issue	Access/Login	3 - High	2 - Normal	
9	Sherman Adelson	Issue	Hardware	3 - High	2 - Normal	
10	Malissa Jin	Request	Systems	3 - High	2 - Normal	
11	Daniilo Rust	Request	Access/Login	3 - High	2 - Normal	
12	Betsey Crupi	Request	Software	3 - High	2 - Normal	
13	Betsey Crupi	Request	Access/Login	3 - High	2 - Normal	
14	Lance Simpler	Request	Systems	2 - Medium	2 - Normal	
15	Deeann Alvidrez	Issue	Software	0 - Unassigned	3 - Major	
16	Divina Mullet	Issue	Software	3 - High	2 - Normal	
17	Hollis Litz	Issue	Systems	3 - High	2 - Normal	
18	Barrett Mari	Request	Hardware	3 - High	2 - Normal	
19	Merlene Sgro	Request	Access/Login	1 - Low	2 - Normal	

Insights About

Count

Search Insights

2 improvements found [Review Updates](#)

OCCURRENCES OF PRIORITY

3 - High occurs more often

[Learn More](#)

3. Things you can do to explore your data:

- Change the goal (outcome variable) of a story.
- Filter data to focus on certain insights.
- Improve your data to make the insights more relevant.
- Scroll the insights list to look for insights that interest you.
- Click an insight to expand it.
- Learn more about an insight that interests you by hovering over chart segments and hyperlinks to reveal underlying details.

Einstein Data Insights requires the Einstein Analytics Plus license and must be enabled for your org.

Edit Joined Reports with Lightning Report Builder (Beta)

Enhance your joined report workflow by editing joined reports with the Lightning report builder and with more run page functionality including filtering and sorting.

Where: This change is beta in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

 **Note:** This release contains a beta version of Lightning joined reports, which means it's a high-quality feature with known limitations. Lightning joined reports 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 view joined reports in Lightning Experience, you need the Run Reports user permission.
- To create or edit joined reports, you need one of these permissions: Create and Customize Reports, Report Builder, or Report Builder (Lightning Experience).

Why: Work with joined reports in Lightning Experience's modern interface and take advantage of Lightning Experience's productivity-improving features like report run page filtering. Edit joined filters, groups (including cross-block groups), and columns with the Lightning report builder.

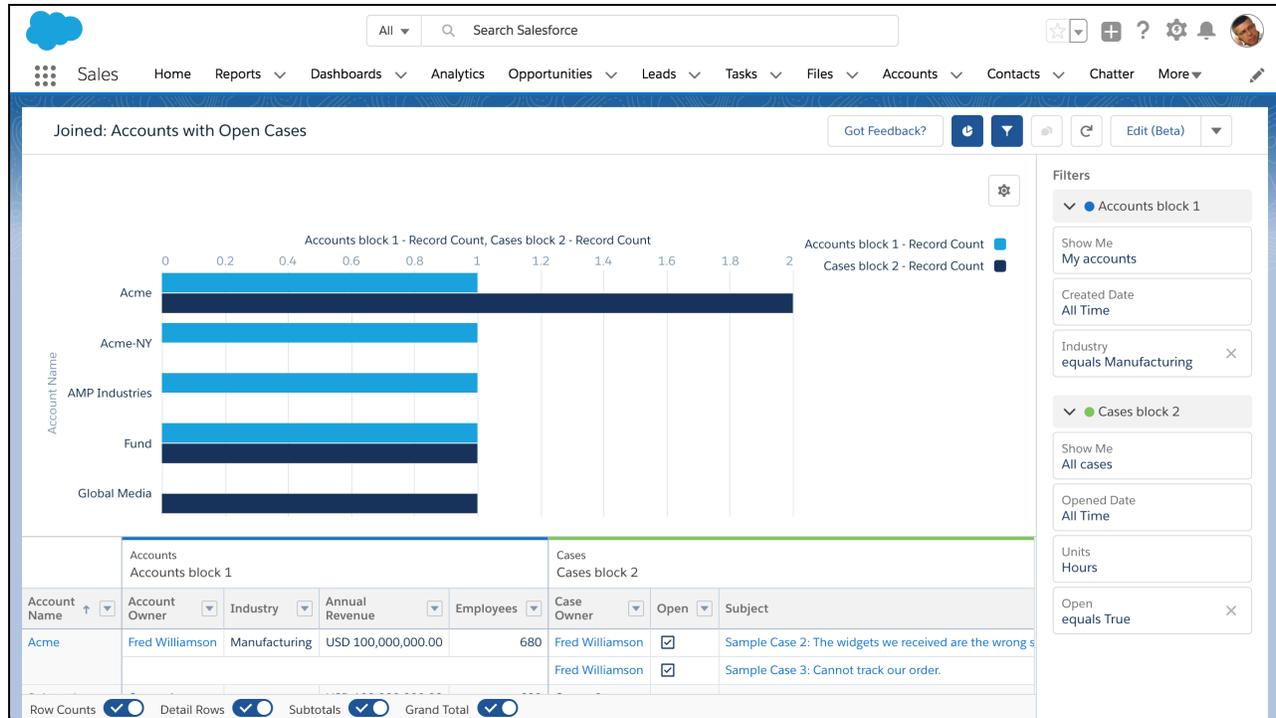
How: If necessary, turn on the Lightning joined reports beta. From Setup, enter *Reports* in the Quick Find box, then select **Reports and Dashboards Settings**. Select **Enable Lightning Joined Reports (Beta)**, and then click **Save**.

To edit a joined report with the Lightning report builder, click **Edit (Beta)**.

The screenshot displays the Salesforce Lightning Experience Report Builder interface for a joined report titled "Joined: Accounts with Open Cases". The interface is divided into several sections:

- Top Navigation:** Includes the Salesforce logo, a search bar, and navigation tabs for Sales, Home, Reports, Dashboards, Analytics, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Chatter, and More.
- Report Header:** Shows the report title "Joined: Accounts with Open Cases" and action buttons: "Got Feedback?", "Save & Run", "Save", "Close", and "Run".
- Field Selection (Left Sidebar):** A search bar "Search all fields..." is followed by a list of fields under "ACCOUNTS". Fields include Account General (24), Account Owner, Annual Revenue (convert), Account Currency, Last Activity, Industry, Created Alias, Created Date, Account ID, Account Owner Alias, Last Modified Alias, Parent Account, Last Modified By, Parent Account ID, Created By, Last Modified Date, Account Source, SIC Description, and Employees.
- Group Across Blocks (Middle):** A section for "Group Across Blocks" with an "Add group..." search bar and a list of selected fields: "Account Name", "Accounts block 1", and "Cases block 2".
- Columns (Middle):** A section for "Columns" with an "Add column..." search bar and a list of selected columns: "Account Owner", "Type", "Last Modified Date", "Billing State/Province", "Case Owner", "# Open", "Subject", and "Date/Time Opened".
- Visualizations (Right):** A horizontal bar chart titled "Cases block 2 - Record Count" showing the record count for three accounts: Acme (approx. 1.8), Fund (approx. 0.8), and Global Media (approx. 0.8).
- Data Table (Right):** A table with columns: Account Name, Account Owner, Type, Last Modified Date, Billing State/Province, Case Owner, and Op. The table shows data for ABC Labs, Acme, and Acme-NY, with subtotals for each account. A warning message states: "Previewing a limited number of records. Run the report to see everything."
- Bottom Controls:** A row of toggle switches for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently turned on.

Work with joined reports on the joined report run page just like you work with other reports in Lightning Experience. For example, to work with filters, click .



In addition to editing, these features are newly available.

- Charts
- Edit filters while viewing
- Add to Dashboard
- Save
- Sort columns and groups

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.

Features Not Available

These features aren't available in the Lightning Experience report builder, but they are available in the embedded Salesforce Classic report builder. To open the Salesforce Classic report builder in Lightning Experience, click either **New Report (Salesforce Classic)** or **Edit (Salesforce Classic)**. Editing and building feature gaps and limitations include:

- Creating joined reports
- Adding or removing blocks and report types
- Renaming blocks
- Reordering blocks
- Changing the principal report type
- Adding and editing custom summary formulas and cross-block custom summary formulas

Running and reading feature gaps and limitations include:

- Subscriptions
- Export
- Open in Quip

- Chatter feeds
- Trend
- Einstein Data Insights (Beta)

Enjoy a Better Interface with Enhanced Run Page (Beta)

We streamlined the enhanced run page interface to save you time and a few clicks.

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 Experience, 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.

Why: Want a faster way to review or hide a report's count of rows, detail rows, subtotals, and grand total? We've included toggles for each of these options in the enhanced run page (1). The new interface also shows you the report type a report is based on (2). And, the Filters pane now displays the cross filters added to the report (3).

Stage	Account Name	Opportunity Name	Close Date	Amount	Average amount
Closed Won (2)	Northtech Communications, Inc. (1)	Northtech Communications Inc - 16 AW 5000 Series Printers	4/13/2018	USD 2,000,000.00	
	Subtotal			USD 2,000,000.00	2,000,000.00
	ZiffCorp (1)	ZiffCorp- Printers	4/13/2018	USD 1,500,000.00	
Subtotal				USD 1,500,000.00	1,500,000.00
Subtotal				USD 3,500,000.00	1,750,000.00
Proposal/Price Quote (1)	ZiffCorp (1)	ZiffCorp - Laptops	5/6/2018	USD 20,000.00	
	Subtotal			USD 20,000.00	20,000.00
Subtotal				USD 20,000.00	20,000.00
Perception Analysis (1)	Global Media (1)	Global Media - 400 Widgets	2/12/2011	USD 20,000.00	
	Subtotal			USD 20,000.00	20,000.00
Subtotal				USD 20,000.00	20,000.00
Needs Analysis (2)	Northtech Communications, Inc. (1)	Northtech - Laptops	7/15/2018	USD 1,125,000.00	
	Subtotal			USD 1,125,000.00	1,125,000.00
	Vandelay Industries (1)	Vandelay - Printers	5/20/2018	USD 16,000.00	
Subtotal				USD 16,000.00	16,000.00
Subtotal				USD 1,141,000.00	570,500.00
Total (6)				USD 4,681,000.00	780,166.67

How: Click **Switch to Enhanced Run Page (Beta)** in Reports. If you need to switch back, click **Switch to Legacy Run Page**.

Draw Insights Quicker by Drilling into Your Data

Take a closer look at records in a summary or matrix report without editing it. The drill-down feature for primary row groupings makes its debut in the enhanced run page (beta).

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

Who: To drill down on a report and group by columns in the report from the enhanced run page (beta), you need Run Reports permission. To drill down and group by all columns of this report type, you need Create and Customize Reports permission.

Why: Sometimes, sales leaders like to track the progress of just a few of their reps. Or, they want to review the opportunities closing in the current quarter. With the drill-down option in the enhanced run page (beta), users can go a level deeper from a summary or matrix report and find those answers easily.

How: From a summary or matrix report's enhanced run page, check the box next to a primary grouping value you want to drill down. Click **Drill-down**. Specify the field you want to group the results by, and click **Apply**.

The screenshot shows a Salesforce report interface. At the top, there is a blue button labeled "Drill Down (1)" with a hand cursor over it. To its right are buttons for "Switch to Legacy Run Page", "Got Feedback?", and "Add Chart". Below these buttons, the report header shows "Total Records 1,548". The table has columns: Opportunity Owner, Account Name, Opportunity Name, Stage, Fiscal Period, and Amount. The "Opportunity Owner" column is expanded, showing a list of records for "Brian Alison (341)". A red box highlights the checkmark in the first row of this expanded list. At the bottom of the table, there are toggle switches for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently turned on.

Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount
<input checked="" type="checkbox"/> Brian Alison (341)	Global Media	Global Media - 400 Widgets	Id. Decision Makers	Q1-2011	USD 20,000.00
	Acme	salesforce.com - 1,000 Widgets	Negotiation/Review	Q1-2011	USD 500,000.00
	salesforce.com	salesforce.com - 2,000 Widgets	Value Proposition	Q1-2011	USD 50,000.00
	Global Retail	Fred	Id. Decision Makers	Q1-2011	USD 40,000.00
	Acme	Acme - 1,200 Widgets	Value Proposition	Q1-2011	USD 100,000.00
	Acme	Acme - 600 Widgets	Needs Analysis	Q1-2011	USD 20,000.00
	salesforce.com	Acme - 200 Widgets	Prospecting	Q1-2011	USD 70,000.00
	Acme	Global Media - 400 Widgets	Id. Decision Makers	Q1-2011	USD 20,000.00
	salesforce.com	Acme - 1,200 Widgets	Value Proposition	Q1-2011	USD 100,000.00
	salesforce.com	Acme - 600 Widgets	Needs Analysis	Q1-2011	USD 20,000.00
	Global Media	Acme - 200 Widgets	Prospecting	Q1-2011	USD 70,000.00
	Acme	salesforce.com - 1,000 Widgets	Negotiation/Review	Q1-2011	USD 140,000.00
	salesforce.com	salesforce.com - 2,000 Widgets	Value Proposition	Q1-2011	USD 70,000.00
	salesforce.com	Fred	Id. Decision Makers	Q1-2011	USD 20,000.00
	salesforce.com	Global Media - 400 Widgets	Id. Decision Makers	Q2-2011	USD 40,000.00
	Global Media	Global Media - 400 Widgets	Id. Decision Makers	Q2-2011	USD 20,000.00
	salesforce.com	Acme - 1,200 Widgets	Value Proposition	Q2-2011	USD 500,000.00
	Global Media	Acme - 600 Widgets	Needs Analysis	Q2-2011	USD 50,000.00

Choose the Currency for a Report

If your org has an international clientele, chances are some of your users want the option to review the financial data in other currencies. Lightning report builder lets users set the currency on a report.

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

Why: Suppose your reps in UK want to track of their sales pipeline amount in British Pound. Meanwhile, sales managers in Europe want to compare the value of closed won opportunities in Euros. With the option to select the currency for each report, your team no longer needs to manually convert figures before gaining valuable insights.

How: In an org that has multiple currencies enabled and currencies activated, select the report. Click **Edit**. In the currency picklist, set the currency. To preserve your choice for this report, click **Save**.

The screenshot shows the Lightning Experience Report Builder interface. On the left, there are panels for 'Groups', 'Columns', and 'Formula Columns'. The main area displays a report preview with columns for Stage, Account Name, Opportunity Name, Close Date, Amount, and Average amount. A currency picklist dropdown menu is open in the bottom right corner, showing options: EUR - Euro, GBP - British Pound (selected), and USD - U.S. Dollar. The current currency is set to GBP.

Stage	Account Name	Opportunity Name	Close Date	Amount	Average amount
Subtotal				GBP 770,000.00	303,000.00
Id. Decision Makers (5)	Acme (2)	Fred	3/1/2015	USD 40,000.00	
		Fred	4/13/2014	USD 20,000.00	
Subtotal				GBP 46,200.00	23,100.00
Global Media (1)		Global Media - 400 Widgets	3/4/2015	USD 20,000.00	
Subtotal				GBP 15,400.00	15,400.00
Global Retail (2)		Fred	3/10/2015	USD 40,000.00	
		Global Media - 400 Widgets	3/13/2015	USD 20,000.00	
Subtotal				GBP 46,200.00	23,100.00
Subtotal				GBP 107,800.00	21,560.00
Value Proposition (4)	Acme (1)	salesforce.com - 2,000 Widgets	2/28/2015	USD 50,000.00	
Subtotal				GBP 38,500.00	38,500.00
Global Media (2)		Acme - 1,200 Widgets	3/5/2015	USD 100,000.00	
		salesforce.com - 2,000 Widgets	4/12/2014	USD 70,000.00	
Subtotal				GBP 130,900.00	
Global Retail (1)		salesforce.com - 2,000 Widgets	3/9/2015	USD 50,000.00	
Subtotal				GBP 38,500.00	
Subtotal				GBP 207,900.00	

Role Hierarchy Filter Requires a Role Selection

When applying a role hierarchy filter to a report in Lightning Experience, you now need to specify a role from the hierarchy. Once you select a role, the report is filtered to show records owned by users in that role and those rolling up to that role. If you previously saved a report without selecting a role, the report is filtered by your role when you run it.

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

Why: When running reports in Lightning Experience with role hierarchy filters that don't have a role saved, keep the following default behaviors in mind:

- If you have an assigned role, standard report types are filtered by the top-level role in your hierarchy. And, custom report types are filtered by your role when you run it.
- If you don't have an assigned role, reports are filtered by a top-level role.

For example, say your org has role hierarchy defined from the top level as CEO, VP, manager, and sales rep.

If a manager runs a standard report type without a role saved, the report is filtered to show records owned by CEO and every role reporting up to the CEO role. If another person without an assigned role runs the report, the report is filtered to show records owned by the top-level role and those rolling up to that role.

If a manager runs a custom report type without a role saved, the report is filtered to show records owned by manager role, and every role reporting up to manager role. If another person without an assigned role runs the report, the report is filtered to show records owned by the top-level role and all roles below that role.

Dashboards: More Filter Values, Joined Reports as Source Reports, Custom Axis Ranges and Decimal Precision

Shine a light on data with dashboards that feature up to 50 values per filter, data from joined reports, custom ranges for chart axes, and numbers that show up to five decimal places.

IN THIS SECTION:

[Add Up to 50 Values to Each Dashboard Filter](#)

Dashboards illuminate your business data, and dashboard filters let you shine a light on specific parts of your business. Previously, you could add up to 10 distinct values (like State equals California) to a dashboard filter. Now you can add up to 50 distinct values to each dashboard filter.

[Set Decimal Precision in Dashboard Charts and Tables](#)

Choose how many decimal places charts, tables, and metrics show in dashboards, from 0 to 5.

[Customize Axis Ranges on Dashboard Charts](#)

Choose the range of the x- and y-axes on dashboard charts, or let Salesforce automatically set them. You can only set custom ranges on axes that display a numeric field.

[Use Joined Reports as Source Reports for Dashboard Components](#)

With a joined report as its source report, a dashboard component can contain data from multiple standard or custom report types. Or, you can provide multiple views of the same object.

Add Up to 50 Values to Each Dashboard Filter

Dashboards illuminate your business data, and dashboard filters let you shine a light on specific parts of your business. Previously, you could add up to 10 distinct values (like State equals California) to a dashboard filter. Now you can add up to 50 distinct values to each dashboard filter.

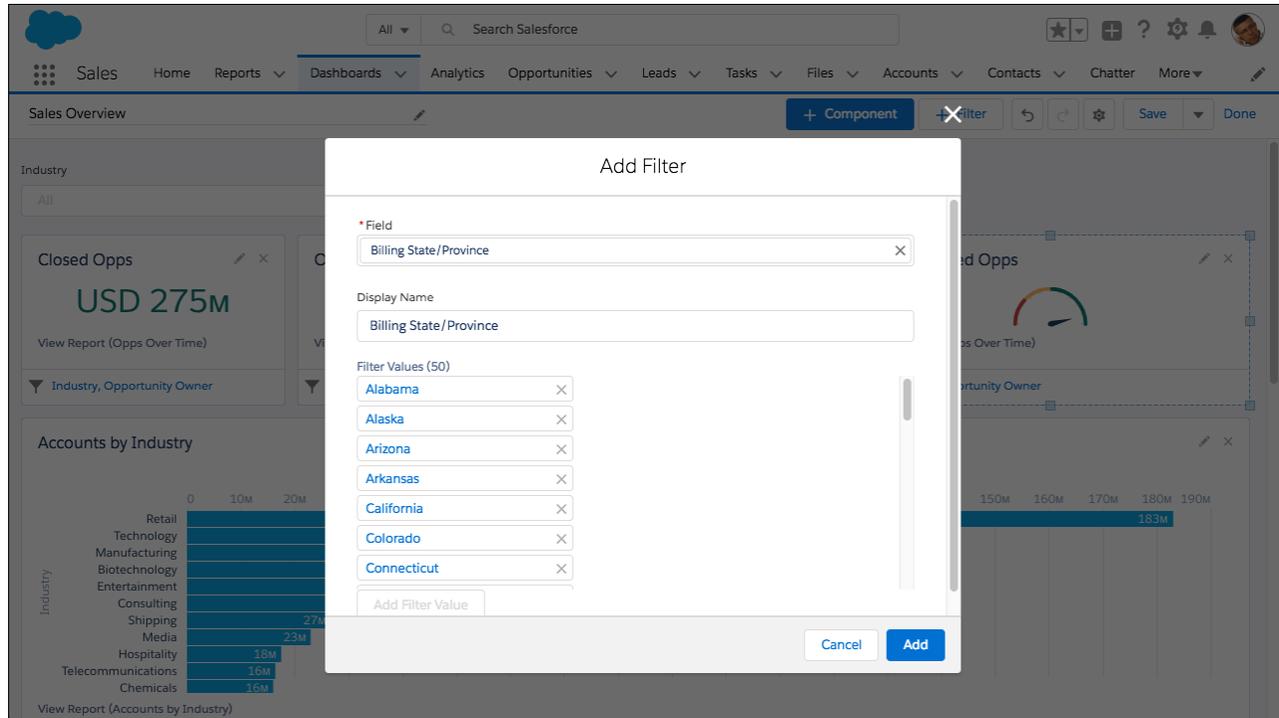
Where: This change applies to both Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To view, refresh, and apply filters to dashboards, you need the Run Reports user permission.
- To add filters to dashboards, you need one of these permissions: Create and Customize Dashboards, Edit My Dashboards, or Manage Dashboards in Public Folders.
- To add or edit filters to dynamic dashboards, you need the Manage Dynamic Dashboards user permission.

Why: With up to 50 values per filter, you can filter by all 50 states!

How: Add or edit a filter, choose a field, and then click **Add Filter Value** to add up to 50 filter values.



Set Decimal Precision in Dashboard Charts and Tables

Choose how many decimal places charts, tables, and metrics show in dashboards, from 0 to 5.

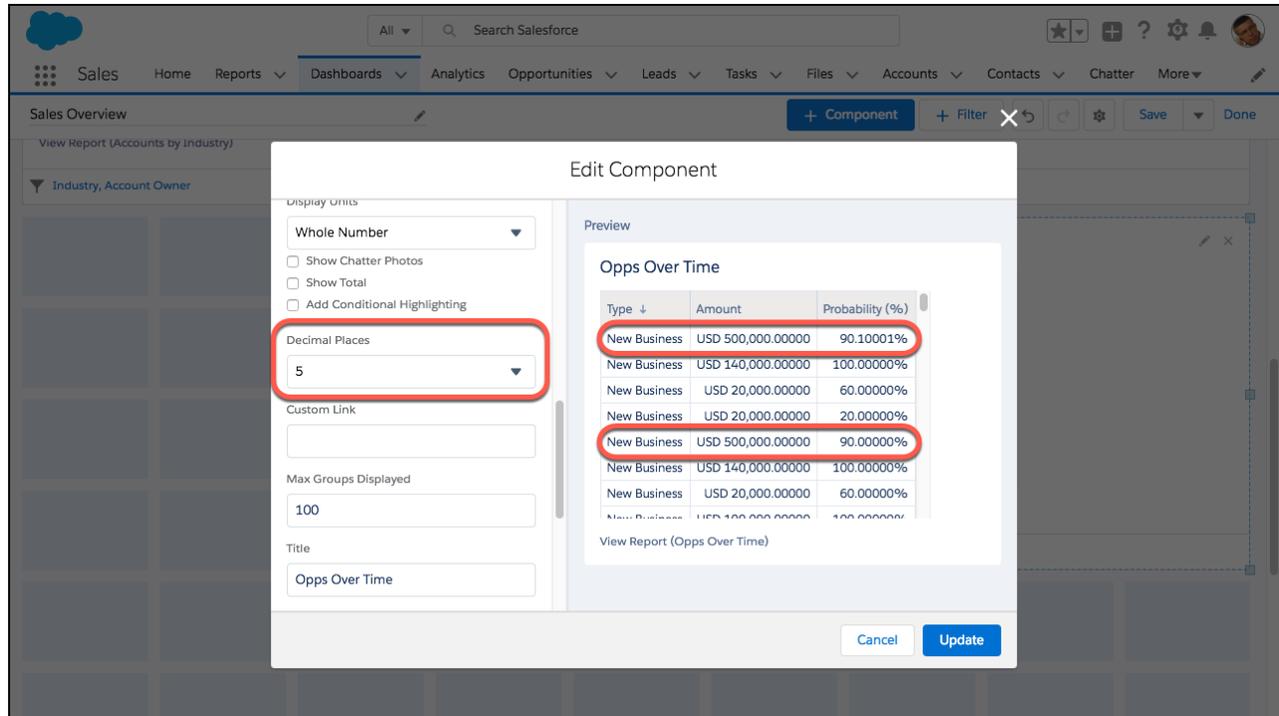
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To set decimal places for a dashboard component, you need one of these permissions: Create and Customize Dashboards, Edit My Dashboards, or Manage Dashboards in Public Folders.
- To set decimal places for a dashboard component on a dynamic dashboard, you need the Manage Dynamic Dashboards user permission.

Why: Because 14.11B is more than 14B and the difference between 90%, 90.1%, and 90.10001% matters.

How: Edit or add a dashboard component, then specify decimal precision with **Decimal Places**.



Customize Axis Ranges on Dashboard Charts

Choose the range of the x- and y-axes on dashboard charts, or let Salesforce automatically set them. You can only set custom ranges on axes that display a numeric field.

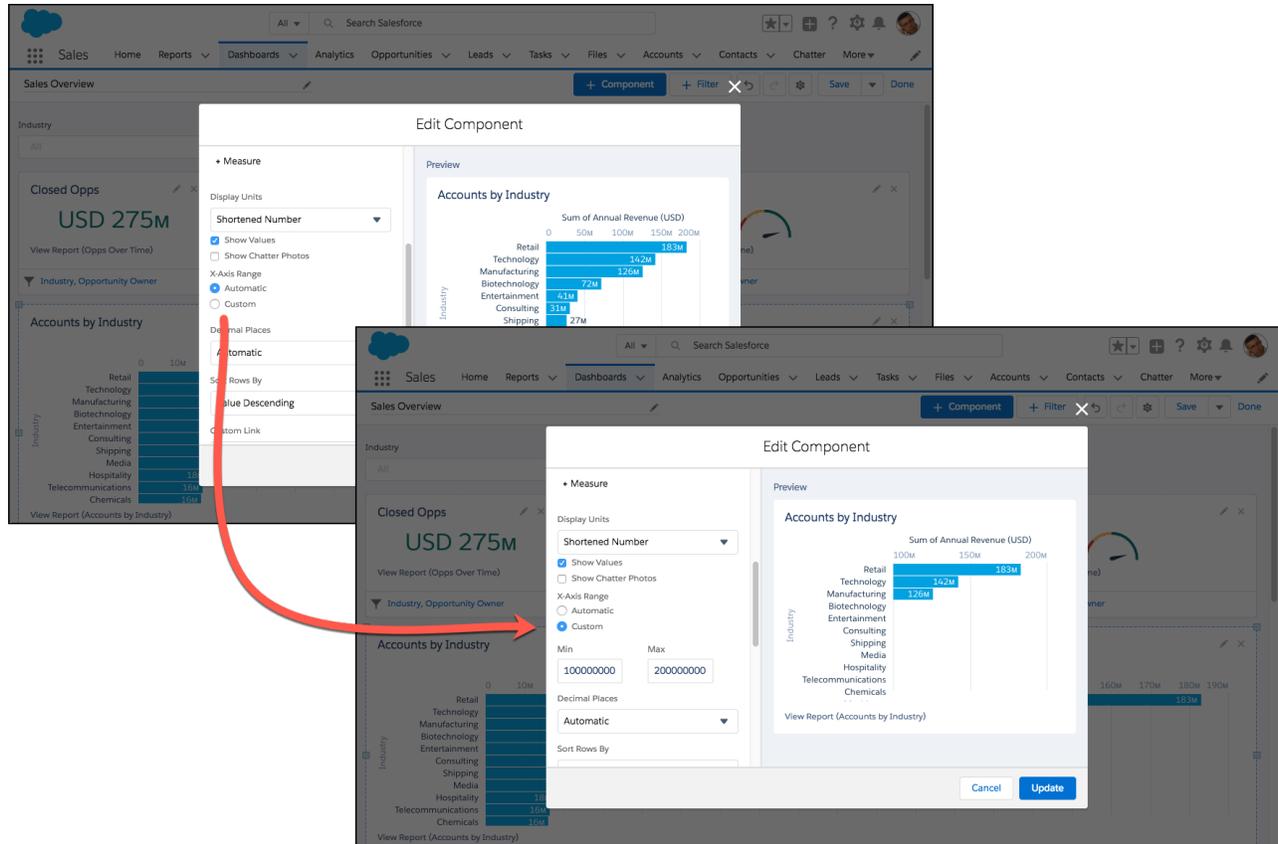
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To customize axis range for a dashboard component, you need one of these permissions: Create and Customize Dashboards, Edit My Dashboards, or Manage Dashboards in Public Folders.
- To customize axis range for a dashboard component on a dynamic dashboard, you need the Manage Dynamic Dashboards user permission.

Why: Highlight specific sections of a chart by showing only part of the range, or emphasize it all by showing the entire range.

How: Edit or add a dashboard component, then customize the range by selecting **Custom** under the X-Axis Range or Y-Axis Range. Choose both a **Min** and a **Max** range, or set only one and Salesforce sets the other for you. Some charts only let you customize the x- or y-axis. For example, horizontal bar charts let you customize only the range of the x-axis.



Use Joined Reports as Source Reports for Dashboard Components

With a joined report as its source report, a dashboard component can contain data from multiple standard or custom report types. Or, you can provide multiple views of the same object.

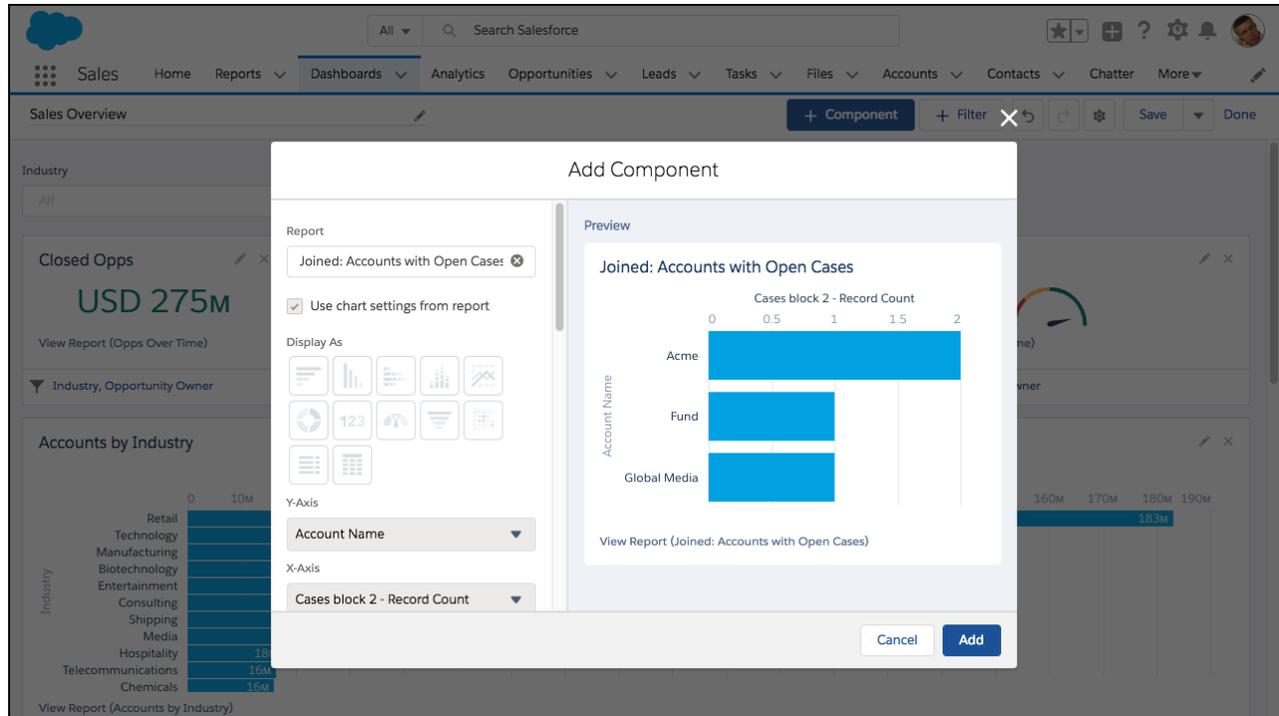
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who:

- To use a joined report as a source report for a dashboard component, you need one of these permissions: Create and Customize Dashboards, Edit My Dashboards, or Manage Dashboards in Public Folders.
- To use a joined report as a source report for a dashboard component on a dynamic dashboard, you need the Manage Dynamic Dashboards user permission.

Why: See accounts with open cases by joining the cases report type to the accounts report type, filtering for open cases, and grouping by account. Or see cases by status by joining the cases report type together on three joined report blocks and filtering each block by status: open, in progress, and closed.

How: To use a joined report as a source report, it must have a chart. To add a chart to your joined report, edit it with the Lightning Experience report builder or edit it in Salesforce Classic. (You can't add charts to joined reports using the Salesforce Classic report builder embedded in Lightning Experience.) Then, click **Add Chart**.



Note: When you use a joined report as a source report, **Use chart settings from the report** is turned on by default and you can't turn it off. To customize the dashboard chart, customize the joined report chart. You can only set these component properties.

- Custom Link
- Max Groups Displayed
- Title
- Subtitle
- Footer
- Component Theme

Subscriptions and Folders: Expanded Subscription Options, Quick Search, Folder Enhancements

Add other people as subscribers to your reports and dashboards so that you can share the latest information automatically on a set schedule. Search for reports, dashboards, and folders from the Reports and Dashboards tab.

IN THIS SECTION:

[Quick Search: Find Reports, Dashboards, and Folders Fast](#)

Global search is great for finding objects across your whole org. But what if you want to look within reports and dashboards? That's where quick search comes in. Search for reports, dashboards, and folders directly from the reports or dashboards tab.

[Report and Dashboard Folder Enhancements](#)

Sometimes little things can make a big difference. That's why we added some bite-sized enhancements to improve your experience with report and dashboard folders.

Quick Search: Find Reports, Dashboards, and Folders Fast

Global search is great for finding objects across your whole org. But what if you want to look within reports and dashboards? That's where quick search comes in. Search for reports, dashboards, and folders directly from the reports or dashboards tab.

Where: This change applies to Lightning Experience in Group, Essentials (reports and dashboards only, not folders), Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Quick search is available to all users. Do a quick search to find any reports, dashboards, or folders that are accessible to you.

Why: Quick search is the perfect complement to global search. Global search helps you find objects across your entire org, whereas quick search helps you find objects locally. Say that you want to find all the public reports relating to opportunities (ones that have *opp* in their name). With quick search, select **Reports > Public Reports** and enter *opp* in the search box to see all the public reports that match.

How: Find the quick search box at the top of each report, dashboard, and folder page. Select a scope on the side menu (1) and the search context instantly changes to that scope (2).

The screenshot shows the 'Public Reports' page in Salesforce. At the top, there is a search box labeled 'Search public reports...' with a magnifying glass icon and the number '2' next to it. To the left of the search box is a side menu with categories: 'Recent', 'Created by Me', 'Public Reports', 'All Reports', and 'FOLDERS'. The 'Public Reports' category is selected, and the number '1' is next to it. Below the search box and side menu is a table of reports with columns: REPORT NAME, DESCRIPTION, FOLDER, CREATED BY, and CREATED ON.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON
Recent	Deals by Close Date		Public Reports	Fred Williamson	7/20/2016, 1:46 PM
Created by Me	JOINED REPORT		Public Reports	Fred Williamson	2/28/2018, 1:15 PM
1 reports	Opp by Owner		Public Reports	Fred Williamson	8/8/2016, 10:55 PM
Public Reports	Opp Overview		Public Reports	Fred Williamson	7/20/2016, 10:10 AM
All Reports	Opps Overview TEST		Public Reports	Fred Williamson	8/7/2016, 10:52 PM
FOLDERS	RH Opps		Public Reports	Fred Williamson	8/12/2016, 1:11 PM
	Sample Report: # of Accou...	How many accounts are be...	Public Reports	Fred Williamson	7/6/2016, 10:08 AM

Start entering text to see the list of matches within the selected scope.

The screenshot shows the 'Public Reports' page in Salesforce with the search box containing the text 'opp'. The search results are filtered to show only reports related to opportunities. The side menu is still visible, and the 'Public Reports' category is selected.

REPORTS	REPORT NAME	DESCRIPTION	FOLDER	CREATED BY
Recent	Opp by Owner		Public Reports	Fred Williamson
Created by Me	Opp Overview		Public Reports	Fred Williamson
Private Reports	Opps Overview TEST		Public Reports	Fred Williamson
Public Reports	RH Opps		Public Reports	Fred Williamson
All Reports	Sample Report: # of Oppor...	How many opportunities ar...	Public Reports	Fred Williamson

Some points to remember about quick search.

- Quick search shows only the first 20 results. A message indicates if there are more results that aren't showing.
- The context is always what is selected on the side menu.
- Quick search on folders finds all folders and subfolders that you can access, but not the reports and dashboards in the folders.
- The options to customize columns and create folders are disabled during quick search.
- Quick search keeps the current custom column selections and sorting.

Report and Dashboard Folder Enhancements

Sometimes little things can make a big difference. That's why we added some bite-sized enhancements to improve your experience with report and dashboard folders.

Where: These changes apply to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: These changes apply to all folders you have access to.

Why: When you're working with folders, it saves time and clicks if you can perform actions without having to move around.

Folder level actions are now available from inside any folder that you've created or that's been shared with you. You don't have to navigate up a level anymore to share, rename, favorite, or delete a folder.

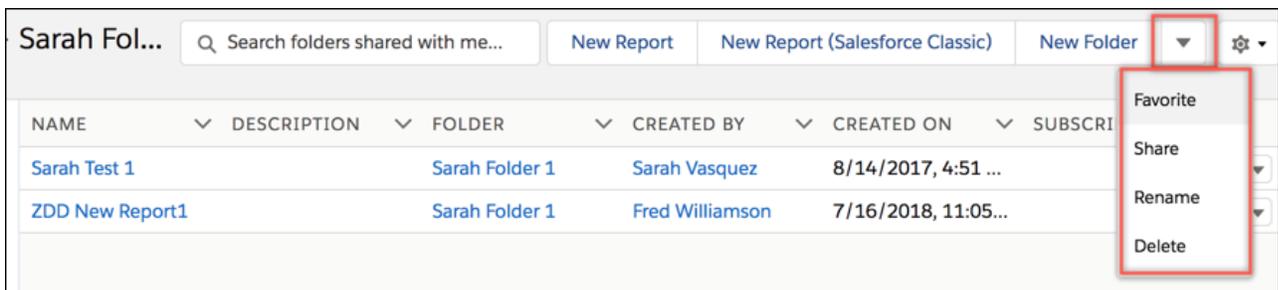
If you're saving or moving a report or dashboard, there's no need to jump away from your current activity to create the new folder. You can now create a folder in the folder selection screen.

Finally, we've added more folder share types. Territories and subordinates are now available as folder share types.

How:

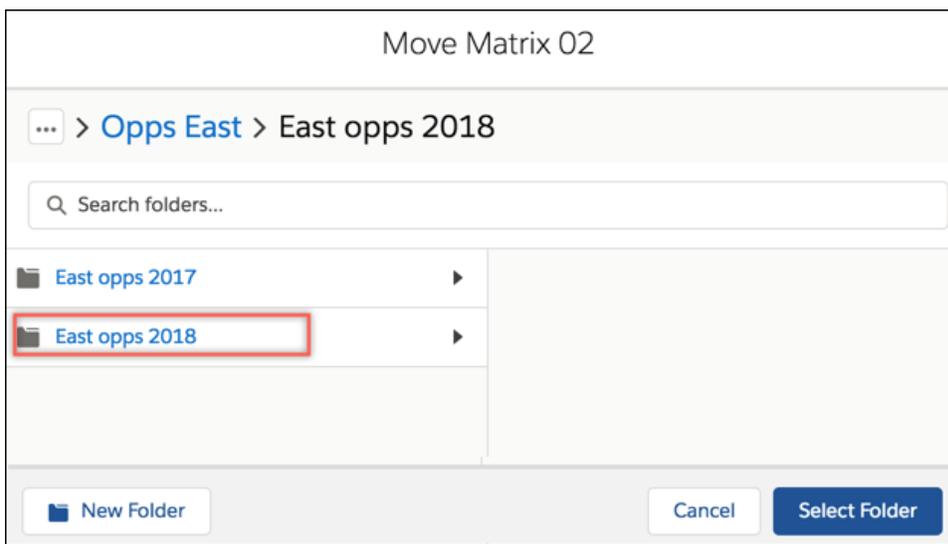
To access the new folder level actions,

1. Navigate to a report or dashboard folder that you've created or that has been shared with you.
2. Click the arrow to the right of the **New Folder** button and select an action for the current folder.

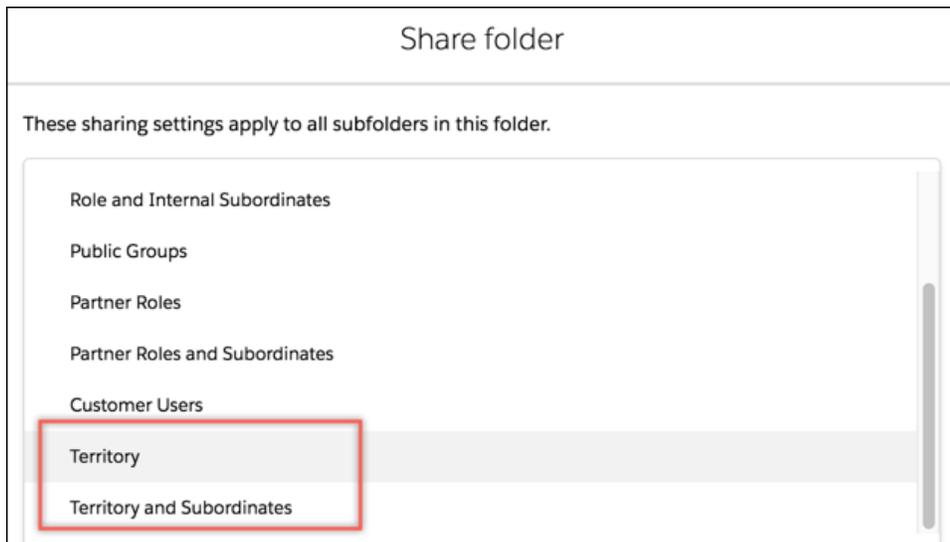


To create a new folder while you're saving or moving a report or dashboard,

1. Click **New Folder** in the selection screen.
2. Name and save the new folder. The screen reopens with the folder created and selected.



To specify territories or territories and subordinates for folder sharing, select one of the options in the Share folder screen.



Other Reports and Dashboards Enhancements

In addition to this release's major features, we're continuing to improve your experience with reports and dashboards.

Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Little touches can make a big difference.

Column Customizations Are Now Sticky on the Reports and Dashboards Tabs

No need to lose your column changes on the Reports and Dashboards tabs. After resizing or setting columns using the settings options on the Reports or Dashboards tab, you can leave and return later without losing any changes.

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.

On Dashboards in Multicurrency Orgs, Negative Values Display Correctly

Previously, negative values displayed as -USD 100. Now, more logically, they display as USD -100.

Add Reports to Dashboards from the Enhanced Run Page (Beta)

To add a report to a dashboard, open the action menu and click **Add to Dashboard**.

Einstein Analytics: Templates, File-Based Connectors, Sharing Inheritance

Take the fast track to apps with Analytics Templates. Create entire dashboards populated with your own data using smart dashboard templates. Bring in more third-party data by connecting directly to Amazon S3 buckets. Take control of sharing with enhanced sharing security based on core sharing rules.

IN THIS SECTION:

[Analytics Onboarding and Getting Started: In-App Videos, Welcome Mat, App Navigation](#)

Learn where you are, with just-in-time instructional videos across Analytics. Roll out the welcome mat for new users. Navigate apps from dropdown menus, and choose whether links open in the Analytics tab or the Analytics Studio.

[Analytics App Building: Smart Templates, Custom Maps, Widget Actions](#)

Build fully functional dashboards faster with smart templates. Add your own maps with just a few clicks. Prevent dashboard viewers from digging in to or sharing your data by hiding a widget's actions.

[Analytics Prebuilt Apps: A Plethora of Analytics App Templates, New Template Picker](#)

Choose from an ever-increasing set of templates to get going fast on the Analytics Platform. And a new template picker gives you a great way to find the template that best serves your analytics needs.

[Analytics Data Integration: Replication Is Now Data Sync, New Amazon S3 Connector, Faster Path to Insights, Enhanced Navigation in Recipes, Enhanced Sharing Inheritance](#)

Data sync is the new name for replication. Load and append multiple CSV files with the Amazon S3 connector. Take your CSV data from file to lens or recipe in a single process. Navigate columns in the recipe editor with the Columns tab. Take control of sharing with enhanced sharing inheritance.

[Analytics Mobile Apps: Push Notifications, Dynamic Pages, Offline \(pilot\), New Charts, and New Widgets](#)

In addition to push notifications, dynamic pages, and offline (pilot), new charts and widgets are now available on mobile.

[Einstein Discovery: Integrated in Einstein Analytics](#)

Einstein Discovery is fully integrated into Einstein Analytics. Now you create stories from Analytics datasets, and navigate stories, investigate insights, visualize data, and discover predictions—all within the familiar Einstein Analytics interface. Learn to enhance your models by examining metrics that reveal their statistical basis and performance, and manage goals and models that you have deployed to Salesforce using the new Model Manager.

Analytics Onboarding and Getting Started: In-App Videos, Welcome Mat, App Navigation

Learn where you are, with just-in-time instructional videos across Analytics. Roll out the welcome mat for new users. Navigate apps from dropdown menus, and choose whether links open in the Analytics tab or the Analytics Studio.

IN THIS SECTION:

[Ease into Analytics with Welcoming Introductory Resources](#)

First-time Analytics Studio users no longer face a blank slate staring back at them. We've rolled out a welcome mat of resources to help them get started. Users also have access to new walkthroughs in the dashboard designer and data manager. In addition, we updated the Einstein Analytics Learning Map and the help menus for each area of Analytics.

[Learn in Context with In-App Videos](#)

Introductory and instructive videos placed in key areas throughout Analytics walk you through a detailed process or show a new feature. With the free-standing, resizable, draggable video player, you can keep video instructions open for reference while you work in Analytics.

[Access the Learning Adventure App within Analytics Studio](#)

Now that the Einstein Analytics Learning Adventure app is integrated into the Analytics Studio, users with access to templates can install it themselves. The app teaches how to pick the right charts, build bindings, and write SAQL queries. And because it's an app, you can look under the hood and see the JSON we used to build each dashboard.

[Expedite Data Visualization with Conversational Queries \(Generally Available\)](#)

Type a word or two, click a suggested data query, and instantly view answers in a chart or table. Conversational exploration is that easy, and it's now generally available. In addition, you see enhancements such as in-context query help and more options for date filters.

[Navigate Your Analytics Apps More Easily from Menus](#)

The navigation panel was taking up too much space, so we moved app navigation to a dropdown menu. From the menu, select your next lens or dashboard, or go to the organization dialog to set up the app's navigation.

[Share Links That Open in Analytics Tab or Studio](#)

When getting the URL to share a dashboard or lens, you can choose whether the link opens the asset in the Analytics Studio or in the Analytics tab in Lightning Experience. Either way, the link opens the asset to the page and with the selections it had when you shared it.

[Additional Enhancements Across Analytics](#)

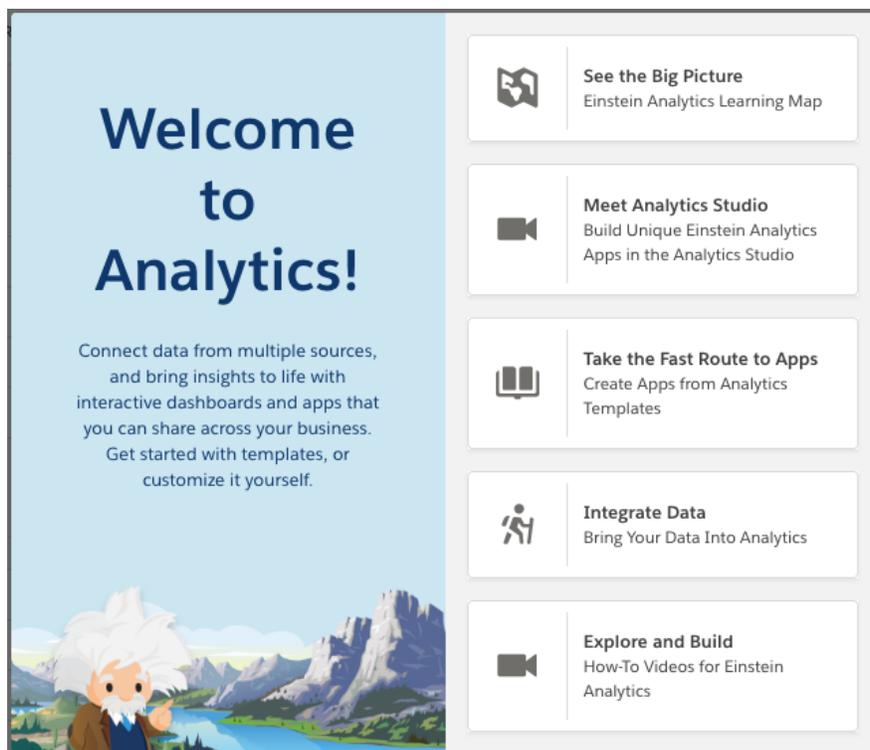
Set more notifications, find and follow your dashboards, retrace your steps, and go home easily.

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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: New Analytics Studio users get oriented quickly, whether they want to integrate data into datasets, build apps, or visualize data queries. Each of the welcome mat's clickable tiles start users on a learning journey to help them create Analytics assets faster.



How: The welcome mat appears when the Analytics Studio is first opened. After that, you can launch it and the walkthroughs from the help menus. The Einstein Analytics Learning Map is available in help menus, or you can go there directly:

<http://www.einsteinanalyticslearningmap.com>.

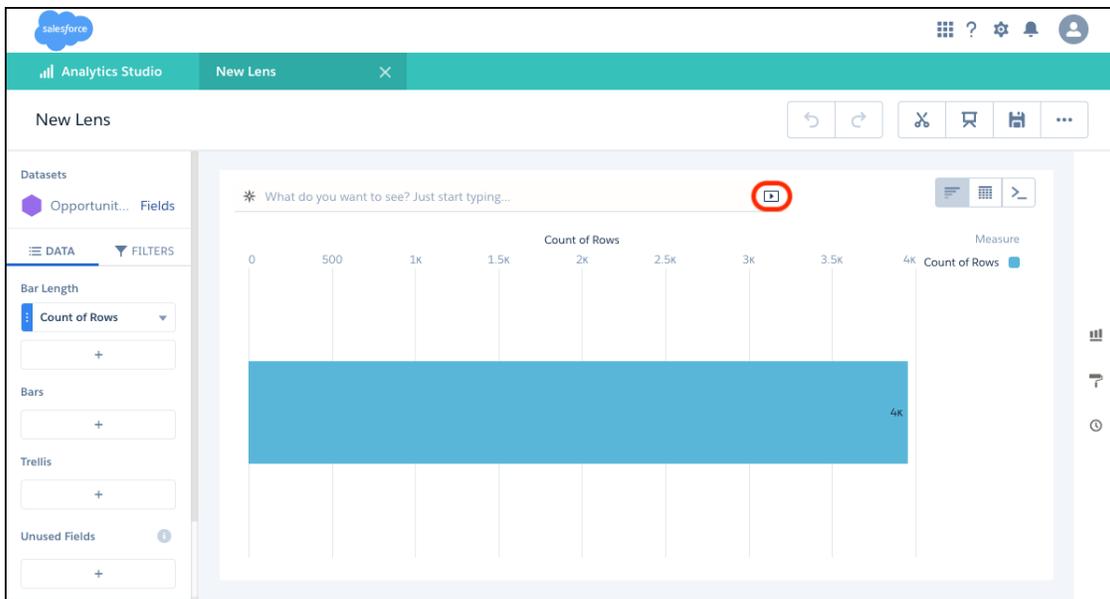
Learn in Context with In-App Videos

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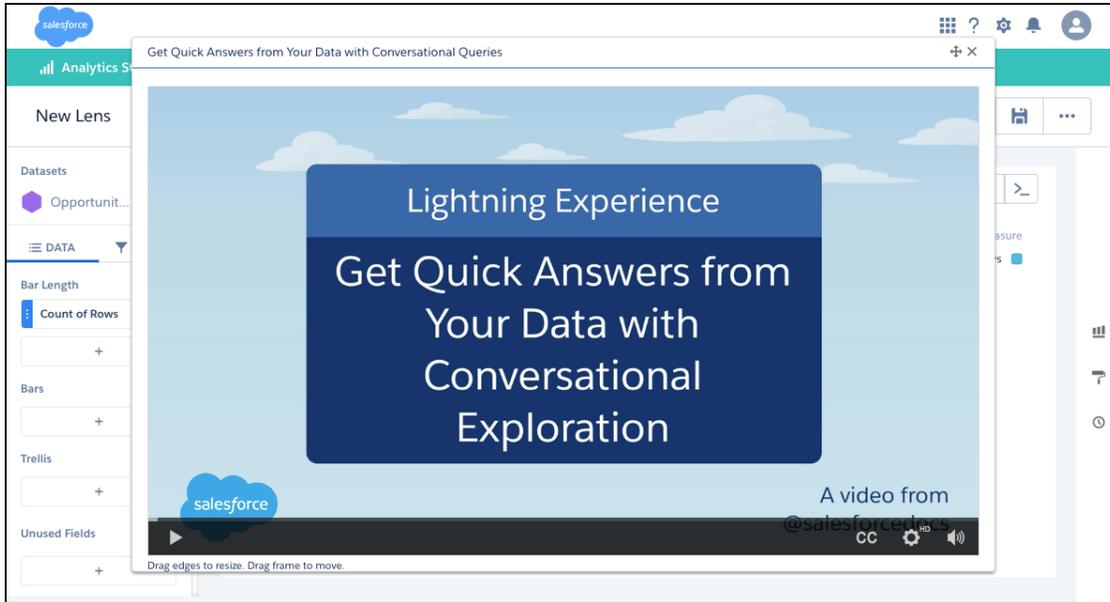
Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Learn about features such as recipes, dataflows, data connectors, conversational queries, compare tables, SAQL, dashboard layouts, dashboard pages, the Fields panel, and conditional formatting.

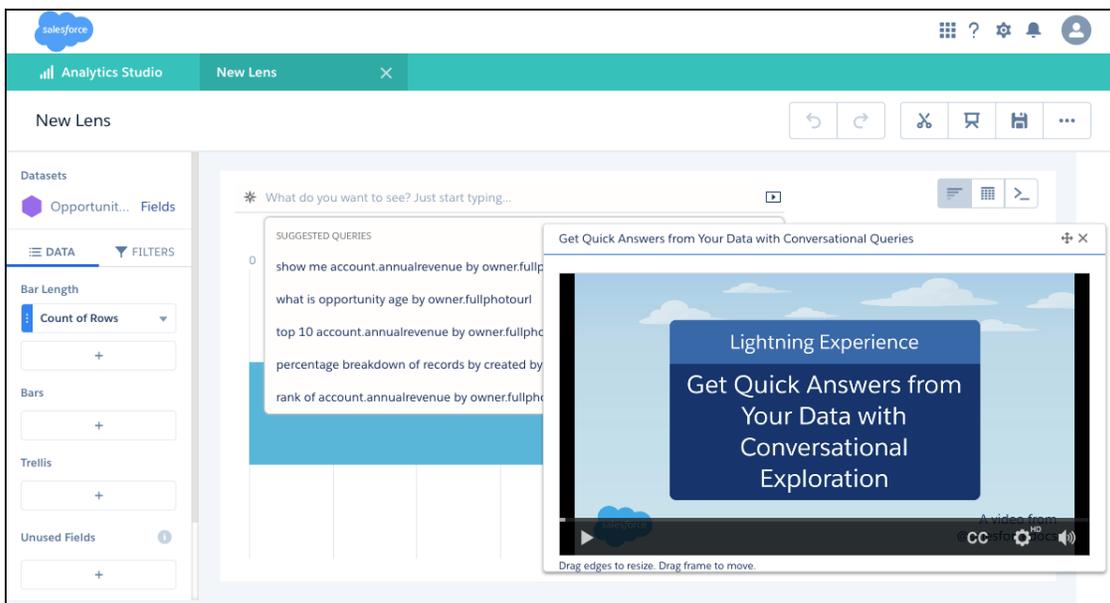
How: Look for video icons in context.



Click  to open the video player.



Size and move the player where you want. Click the **X** in the player's upper right corner when you're done.



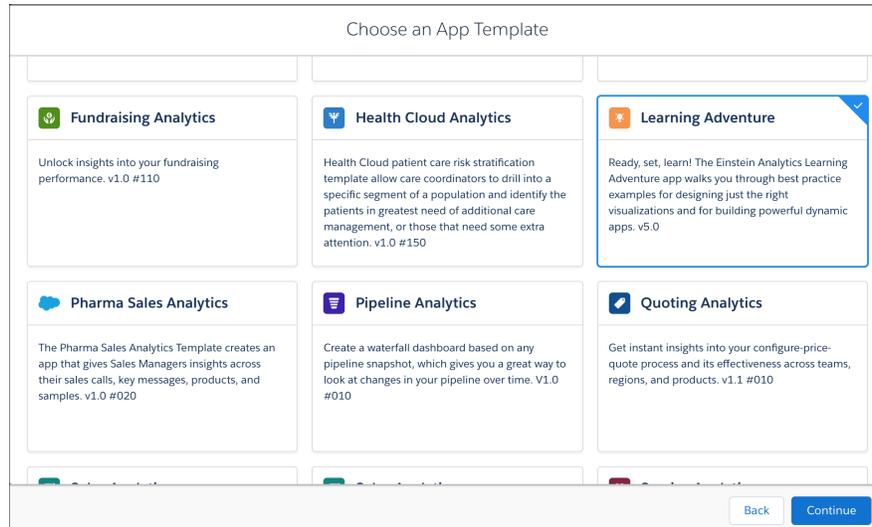
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Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: To install the Learning Adventure App, you need the Manage Analytics Templated Apps permission. To access the Learning Adventure App after it's installed, users need the Use Analytics Templated Apps permission.

How: Click **Create**, select **App**, and under Start from Template, click **Create** again. Then select **Learning Adventure**.



Expedite Data Visualization with Conversational Queries (Generally Available)

Type a word or two, click a suggested data query, and instantly view answers in a chart or table. Conversational exploration is that easy, and it's now generally available. In addition, you see enhancements such as in-context query help and more options for date filters.

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: New features and updates include the following.

- Qualifiers to ask about dates, for example, "this quarter," "previous year," or "next week," are available.
- Relevant suggestions are presented while creating filters.
- The new time zone feature isn't supported for conversational queries.
- If you have more than one dataset open in explorer, conversational queries are disabled.

How: Select **Enable Conversational Exploration** on the Analytics Settings page in Setup. Conversations are then available in running apps, explorer, and dashboard designer.

To start a conversation, click . Click the text box to see suggestions, or start typing your own query.



SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

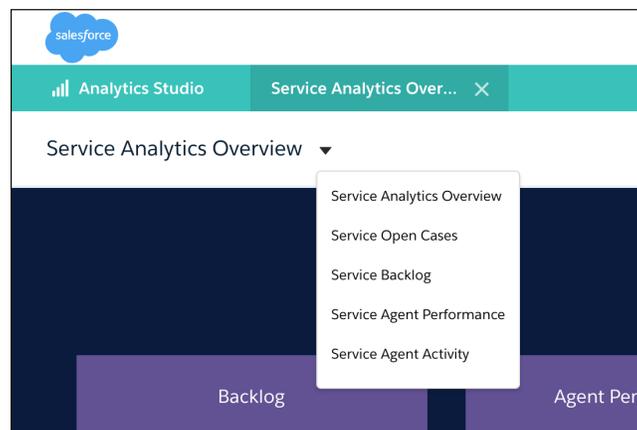
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The navigation panel was taking up too much space, so we moved app navigation to a dropdown menu. From the menu, select your next lens or dashboard, or go to the organization dialog to set up the app's navigation.

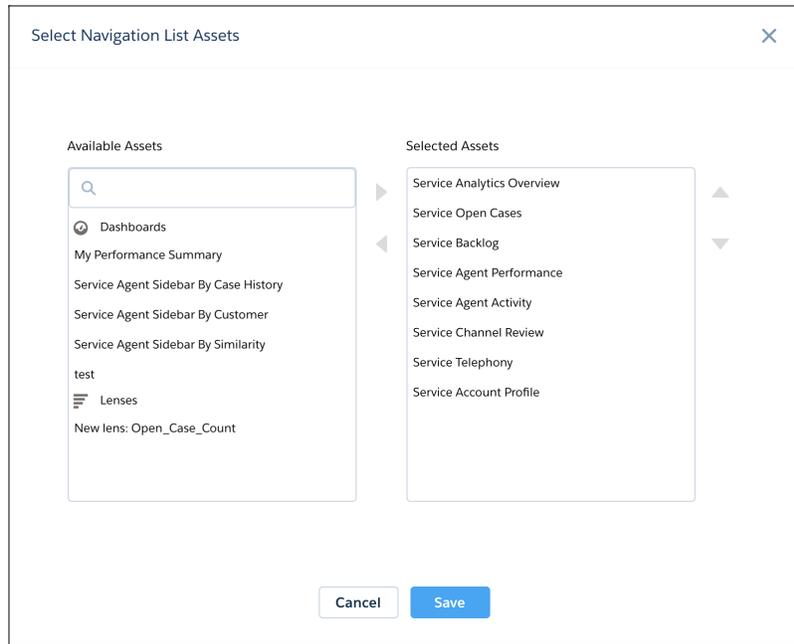
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Important: Dashboards built in the classic dashboard designer no longer support app navigation.

Why: The app navigation menu next to the asset's name (▼) lets users see the lenses and dashboards that are available for exploring.



If you have Manager access to an app, the last item in the menu is **Edit List**. Click it to specify which assets to include in the app's menu.

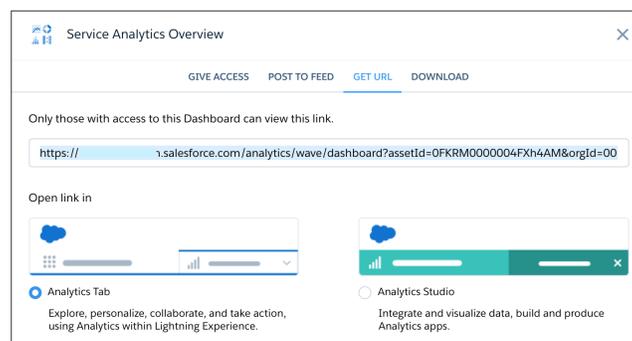


Share Links That Open in Analytics Tab or Studio

When getting the URL to share a dashboard or lens, you can choose whether the link opens the asset in the Analytics Studio or in the Analytics tab in Lightning Experience. Either way, the link opens the asset to the page and with the selections it had when you shared it.

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: Select Analytics Tab to get a link that opens the asset in Lightning Experience. Select Analytics Studio to share the asset with other Analytics builders.



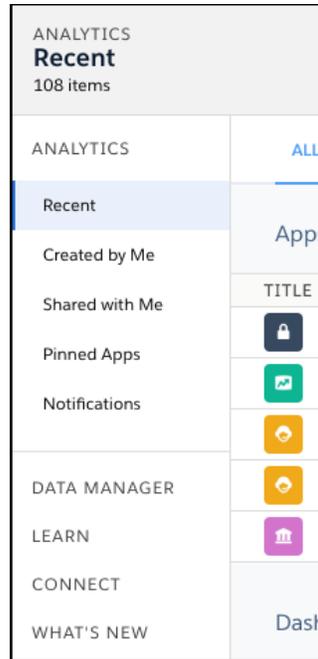
Additional Enhancements Across Analytics

Set more notifications, find and follow your dashboards, retrace your steps, and go home easily.

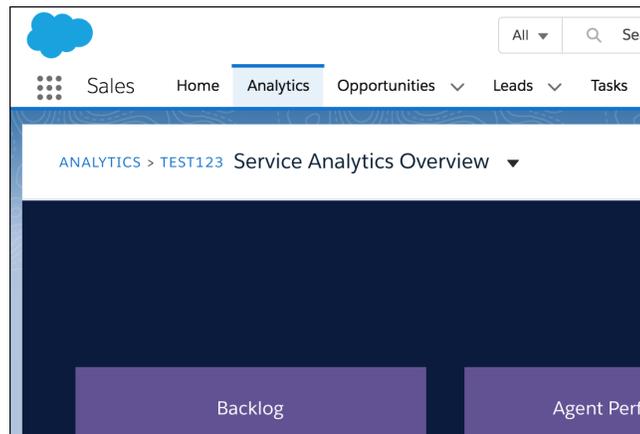
Where: These changes are in Einstein Analytics in Lightning Experience and Salesforce Classic, unless otherwise noted. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: These enhancements make Analytics easier to use.

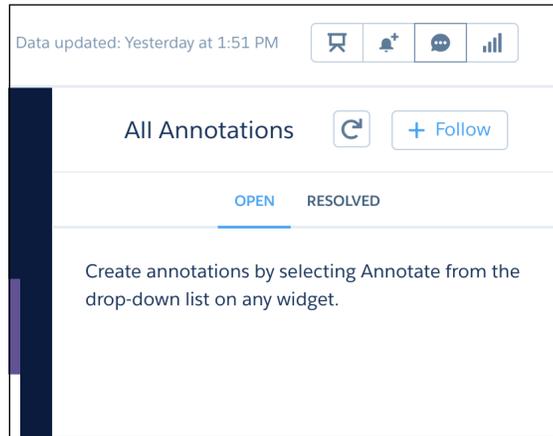
- Depending on your access, additional navigation links on the home page can take you directly to the data manager, model manager, Einstein Analytics Learning Map, Analytics Trailblazer Community, or the latest Release Notes.



- With one click, go to the app page of your dashboard or lens, or back to the Analytics home page. In the Analytics tab in Lightning Experience, links to an asset's app and to the Analytics home page are next to the name of the asset.



- In the Analytics Studio, selecting a dashboard or lens from the app navigation dropdown menu opens the asset in a new tab. Additionally in the Analytics Studio, clicking a link widget in a dashboard opens the link in a new tab.
- When moving from a regular window to a presentation (full screen) and back, the dashboard state is preserved. However you've set up your dashboard, you see all your selections as you move between screens.
- Follow a dashboard to receive all the Chatter from annotations on the dashboard. The **Follow** button is now located in the annotations panel.



- You can set more notifications! The upper limit of notifications per user is now 10.

Analytics App Building: Smart Templates, Custom Maps, Widget Actions

Build fully functional dashboards faster with smart templates. Add your own maps with just a few clicks. Prevent dashboard viewers from digging in to or sharing your data by hiding a widget's actions.

IN THIS SECTION:

[Explore Data from Multiple Datasets in a Single Lens](#)

Sometimes the data you want to explore and visualize reside in different datasets. Don't let that stop you from drilling into your data. You can now combine multiple datasets in a lens and discover insights about your business faster.

[Add Date Filters Faster](#)

You loved the new and improved date filter in dashboards, global filters, and date widgets. So we rolled it out in the explorer too. Choose from the list of preset dates, or customize the date range filter to focus on the time period that's most relevant to you. You can also manually enter the date range for a relative date filter applied to a visualization. And the new toggle in the relative date filter lets you switch easily between calendar year and fiscal year.

[Rename the Count of Rows Label](#)

If you're a multitasking explorer and have different datasets open to its initial state, it can be hard to tell them apart. Eliminate the guesswork. To help you identify a dataset lens quicker, you can change the Count of Rows label in the lens.

[Dates and Date Parts Stay Together](#)

All date fields and their corresponding date parts now appear together in the fields panel.

[Add Your Own Maps to Analytics with a Few Clicks](#)

Analytics comes with prepackaged maps that you can use in map, bubble map, and geo map charts. If you need a map that isn't available, upload the geoJSON file to the user interface to create it. Set the boundaries to focus on a specific region.

[Hide Null Values in a Chart Tooltip](#)

Chart tooltips provide useful information about each data point. However, who needs to see null values? Now you can hide them in tooltips.

[Smart Dashboard Templates Create Ready-Made Dashboards from Existing Datasets](#)

Answer a few questions in the smart dashboard template wizard and Analytics does the rest. Create Performance Summary and Metrics Trend dashboards from existing Analytics datasets fast without using the dashboard editor.

[Hide Widget Actions from Dashboard Viewers](#)

Hide a widget's action menu to prevent users from downloading, sharing, and exploring the widget's results. Or hide it when it's not useful or when the action dropdown arrow is too distracting in smaller widgets.

[Plan for Classic Designer's Retirement](#)

Classic designer is scheduled for retirement in all Salesforce orgs on July 2019. For more information, see the [Classic Dashboard Retirement](#) knowledge article. Starting with Winter '19, you can't create dashboards in classic designer, but you can edit them.

[Look into the Future with the SAQL Timeseries Function](#)

You know that next quarter's and next year's numbers won't be the same as today's, but what might they be? You need to plan your staffing, training, and purchasing today. With the SAQL `timeseries` function, you can use the data you have today to predict your numbers in the future.

[Fill Missing Dates in a Data Stream with the SAQL Fill Function](#)

You want to analyze your data with interactive graphs and predict future numbers with the `timeseries` function. To do this, your data stream must contain a row for every date. But your data has some date gaps - you didn't close a deal every month and no one bought toboggans in the summer. No problem! Use the SAQL `fill` function to fill the date gaps with null rows, then unlock the power of Analytics.

[Give Communities Users Analytics Insights Under the New License](#)

The new license for Communities, Lightning External Apps Plus, includes access to Einstein Analytics. Users with the new license can access embedded Analytics dashboards in your community. Users with a Customer Community Plus and Partner Community licenses continue to have the same access to Analytics for Communities.

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The command-line interface (CLI) plug-in lets you easily create environments to develop, test, and share Analytics apps and convert them to templates for distribution.

[Track Adoption of Einstein Analytics](#)

You can now track Analytics dashboard requests in your event log files. With new fields in the Wave Change event type, you can see where Analytics dashboard requests originate. For field details, see EventLogFile in [Changed Objects](#).

[Other Enhancements in App Building](#)

Learn about the new chart themes, new date presets, and the usability enhancement to the dashboard creation process.

Explore Data from Multiple Datasets in a Single Lens

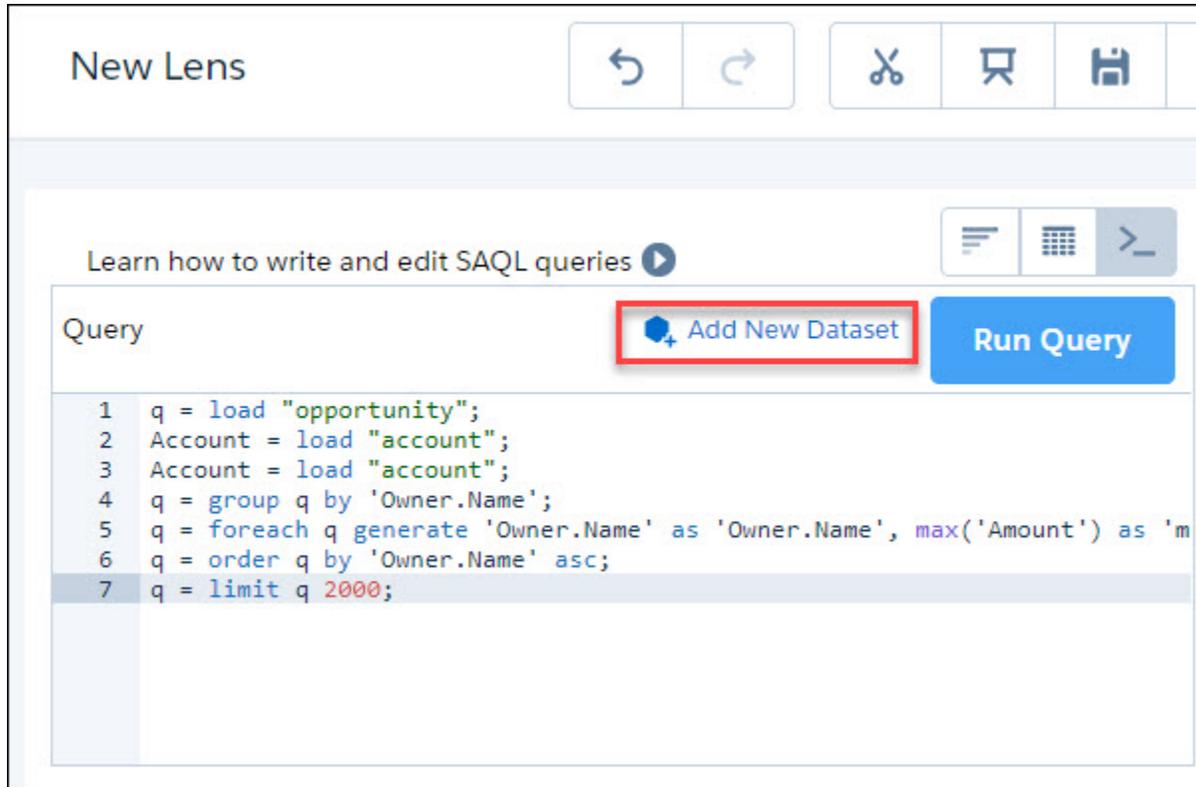
Sometimes the data you want to explore and visualize reside in different datasets. Don't let that stop you from drilling into your data. You can now combine multiple datasets in a lens and discover insights about your business faster.

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: Previously, you had to use SAQL functions to simultaneously access multiple datasets in explorer. Now you can load datasets with just a few clicks, analyze the results, and create visualizations from the combined datasets.

For example, let's say you want to find out all opportunities with accounts generating more than \$500,000 revenue. Load the Opportunities and Accounts datasets into a lens, and explore the data to identify these opportunities.

How: To explore data from multiple datasets, on the Home page, click the primary dataset for your exploration. In the SAQL mode, click **Add New Dataset**. From the Select a Dataset dialog box, choose the secondary dataset, and run the query. Repeat this process if you want to combine more datasets.



⚠ Important:

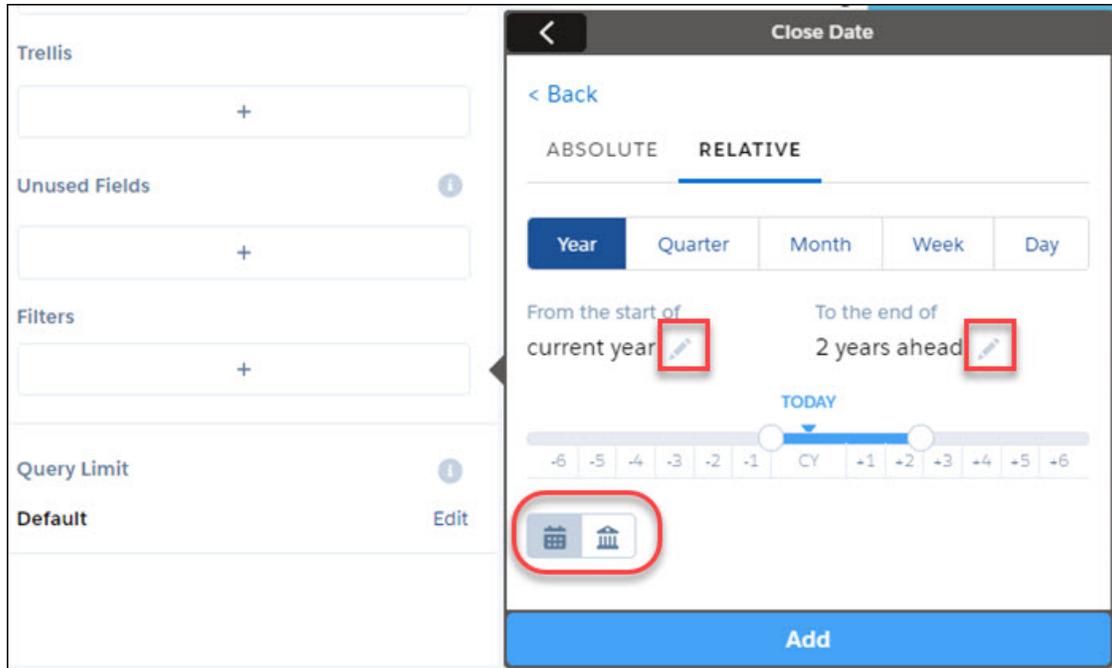
When working with multiple datasets, you can use XMD to customize the formatting for only the primary dataset in the lens. You can rearrange and show or hide the fields of the secondary datasets, but you can't customize their formatting using XMD.

Add Date Filters Faster

You loved the new and improved date filter in dashboards, global filters, and date widgets. So we rolled it out in the explorer too. Choose from the list of preset dates, or customize the date range filter to focus on the time period that's most relevant to you. You can also manually enter the date range for a relative date filter applied to a visualization. And the new toggle in the relative date filter lets you switch easily between calendar year and fiscal year.

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: To add a date filter, click + under **Filters** in the dataset you're exploring. From Dates, select the date field to which you want to apply the filter. Click **Add** when done.

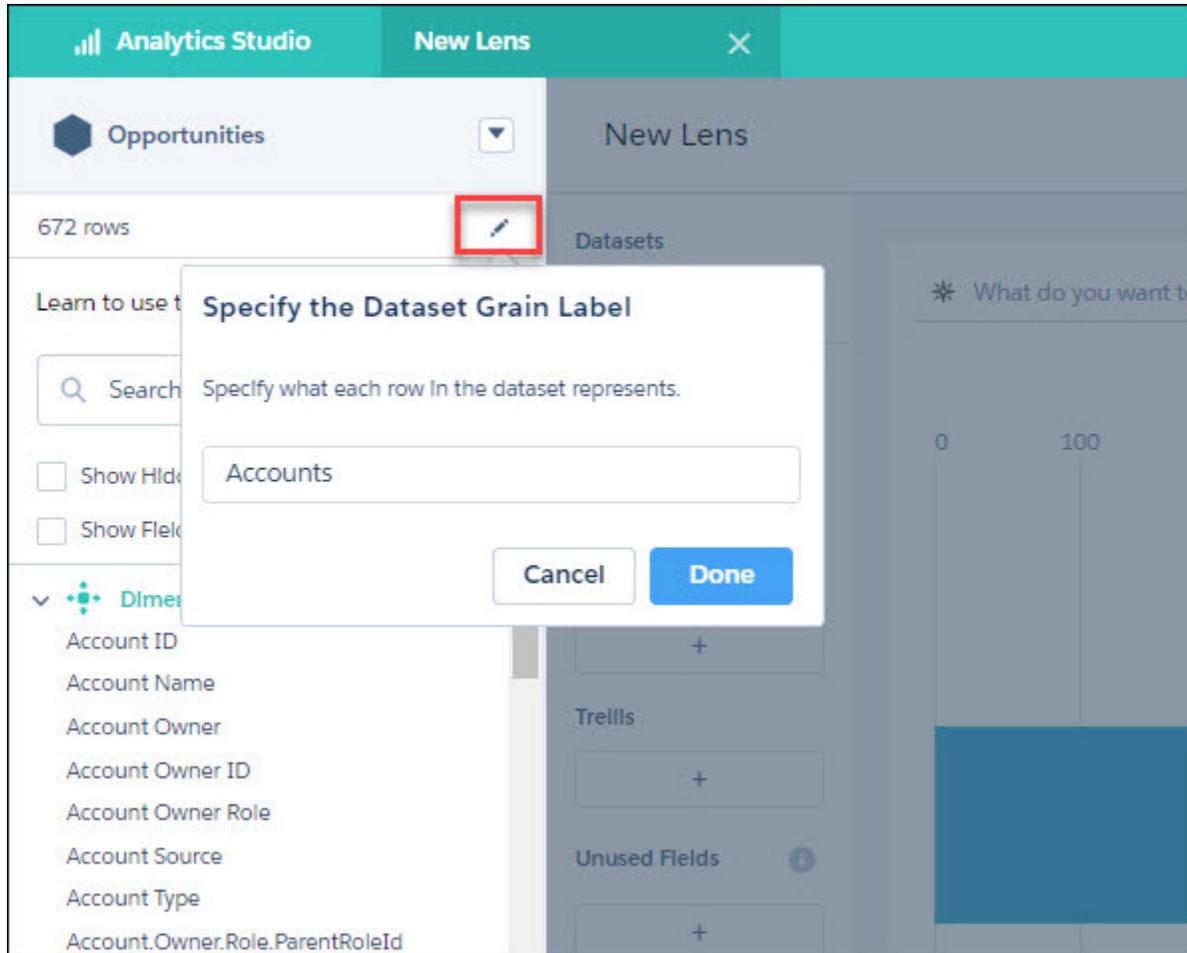


Rename the Count of Rows Label

If you're a multitasking explorer and have different datasets open to its initial state, it can be hard to tell them apart. Eliminate the guesswork. To help you identify a dataset lens quicker, you can change the Count of Rows label in the lens.

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: To rename the label, click **Fields** in the dataset that you're exploring. Click . In the dialog box, enter the new label name. Click **Done** to save your changes.

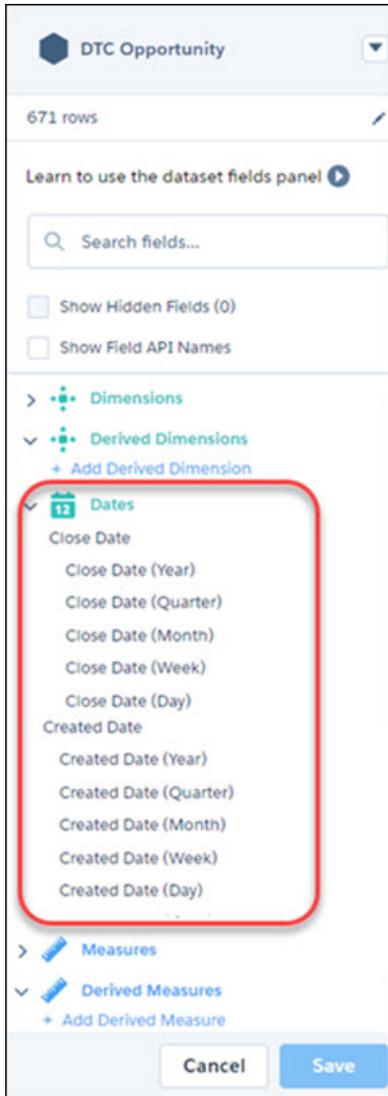


Dates and Date Parts Stay Together

All date fields and their corresponding date parts now appear together in the fields 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.

Why: Previously, a date field in your dataset showed up under the date section. But, its distinct date parts, such as the year, month, and day were arranged under dimensions. That meant more scrolling and less exploring. Now, the date parts of a date field in the dataset automatically display under the date field ordered by the time unit.



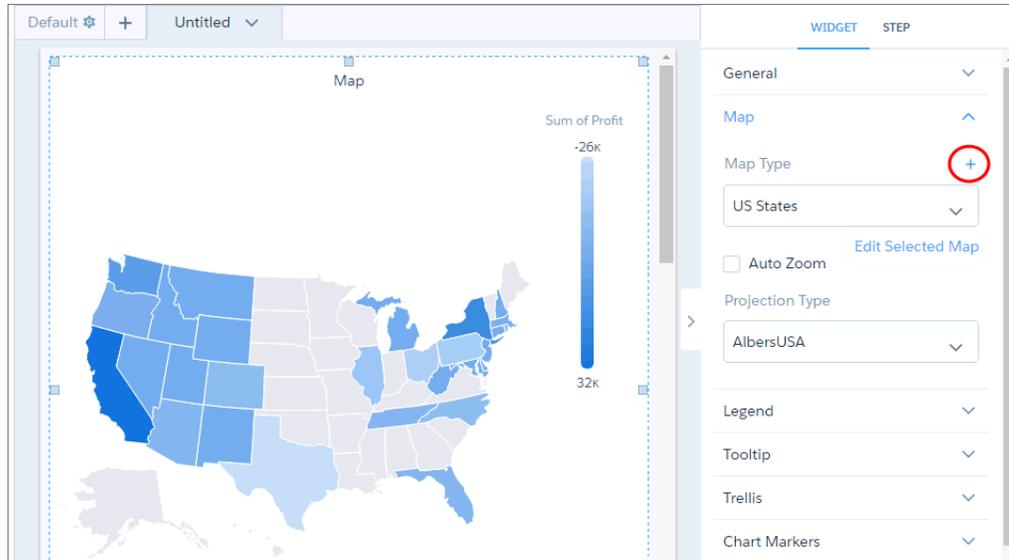
Add Your Own Maps to Analytics with a Few Clicks

Analytics comes with prepackaged maps that you can use in map, bubble map, and geo map charts. If you need a map that isn't available, upload the geoJSON file to the user interface to create it. Set the boundaries to focus on a specific 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.

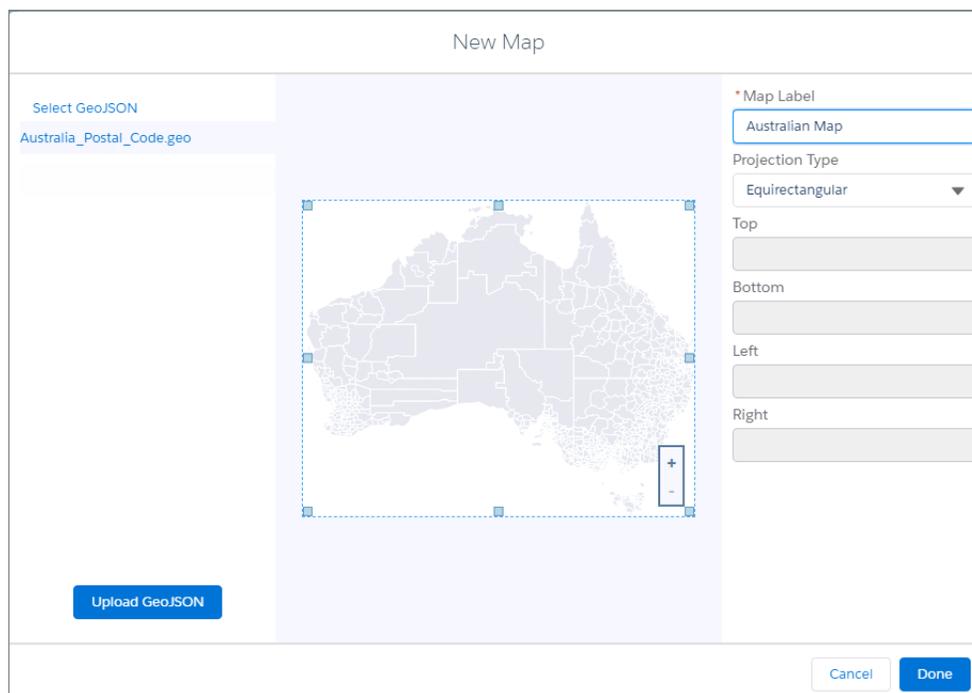
Who: Adding, editing, and deleting custom maps, and uploading geoJSONs requires the Manage Analytics Custom Maps user permission. Users with this permission can edit and delete any custom map, including maps created by other users. All users in the org, even those without this permission, can use all maps in their lenses and dashboards.

How: You can create a map with just a few clicks. Select a map widget, and click **+** next to the Map Type widget property.



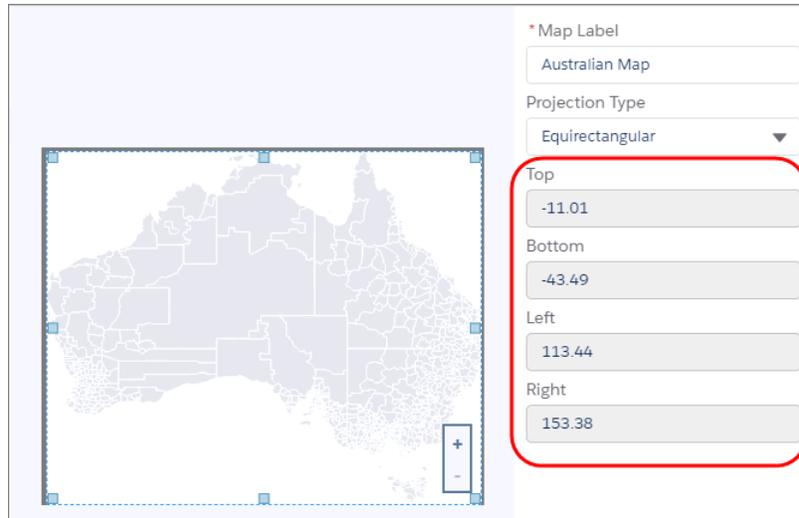
Each map is based on an underlying geoJSON. You can use an existing geoJSON or upload a new one.

Tip: You can create multiple maps from the same geoJSON by applying unique boundaries that focus on different regions.



Specify the label and projection type of the new map. When you use the map in a chart, you can override this default projection type in the widget properties.

Drag the handles of the map to change the boundaries, and zoom in on a particular region.



If you edit the map, the preceding screen has an **Apply to All** option that applies your changes to all lenses and dashboards that use the map. If you don't select this option, the change applies to the current widget only.

Note: The custommap.apex, deletemap.apex, insertmap.apex, and updatemap.apex pages are no longer available. You can use the user interface to create and manage custom maps.

Hide Null Values in a Chart Tooltip

Chart tooltips provide useful information about each data point. However, who needs to see null values? Now you can hide them in tooltips.

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: By default, tooltips show null values as a dash (1). To hide the null values (2), while editing the dashboard, select **Customize tooltip** in the Tooltip widget property section. Then deselect **Show null values**. No more null values.



Smart Dashboard Templates Create Ready-Made Dashboards from Existing Datasets

Answer a few questions in the smart dashboard template wizard and Analytics does the rest. Create Performance Summary and Metrics Trend dashboards from existing Analytics datasets fast without using the dashboard editor.

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 Smart Analytics Dashboard Templates, you must have an Analytics Platform license.

Why: Smart templates automatically create fully functional dashboards with all the accustomed intuitive Analytics features. No manual configuration needed. Use them as is, or customize them to meet your unique requirements. We're building a wide variety of smart templates to address common analytics needs, starting with the following:

- **Performance Summary.** Provides trending for a key performance indicator (KPI) of your choice and comparison between current performance and previous periods. You can also segment performance by any criteria you'd like, such as geography, product mix, or team member.
- **Metrics Trend.** Trend up to 4 KPIs segmented by as many as 6 criteria. You can see the KPIs' year-to-date value, year-over-year change, and trend line for the last 52 weeks.

How: Go to Analytics Studio, click **Create**, and choose **Dashboard**, then **Start from Template**. Select a template and run through its configuration wizard questions to select an existing dataset and choose how you want to view its data. Select the app where you want the dashboard to live, and click **Create**. Then go to the app and open the dashboard to get instant business insights.

Hide Widget Actions from Dashboard Viewers

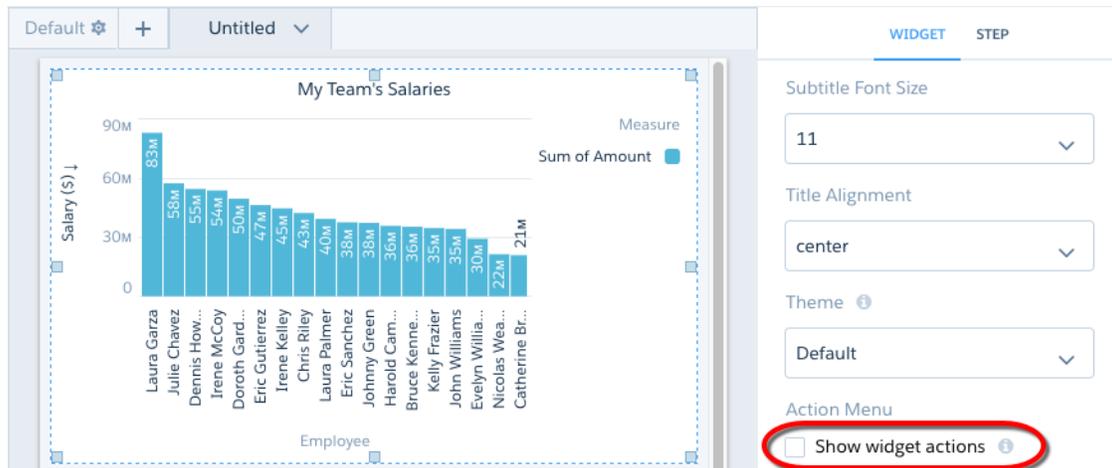
Hide a widget's action menu to prevent users from downloading, sharing, and exploring the widget's results. Or hide it when it's not useful or when the action dropdown arrow is too distracting in smaller widgets.

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: Sometimes, a chart shows sensitive information that shouldn't be shared with others. For example, the following chart's action menu allows users to share, download, and explore employee salaries. To prevent dashboard viewers from accessing these options, you can hide the action menu for this chart.



How: To hide all actions, deselect **Show widget actions** in the widget properties.



Note: The **Show explore icon** option in the action menu changes to **Show explore action**.



Plan for Classic Designer's Retirement

Classic designer is scheduled for retirement in all Salesforce orgs on July 2019. For more information, see the [Classic Dashboard Retirement](#) knowledge article. Starting with Winter '19, you can't create dashboards in classic designer, but you can edit them.

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: We encourage you to start converting classic designer dashboards to the newer dashboard designer now. For more information, see [Convert Your Classic Designer Dashboard to Dashboard Designer](#).

SEE ALSO:

[Einstein Analytics Classic Designer Dashboards Are Retiring](#)

Look into the Future with the SAQL Timeseries Function

You know that next quarter's and next year's numbers won't be the same as today's, but what might they be? You need to plan your staffing, training, and purchasing today. With the SAQL `timeseries` function, you can use the data you have today to predict your numbers in the future.

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 SAQL, you must have an Analytics Platform license.

Why: SAQL `timeseries` makes the most accurate predictions possible based on your existing data. It crunches the numbers and selects the best algorithm for the data you have. What if your data changes with the seasons? No problem. `timeseries` handles both seasonal and non-seasonal data. Want to get your hands dirty and fine-tune the parameters? You can specify your choice of

algorithm, the type of seasonality, and whether to ignore the current time period. Concerned about accuracy? Specify a 95% confidence interval to be sure that your future data falls within the predicted range.

How: To use `timeseries`, open up your SAQL editor in the dashboard. Use `foreach` to project the data you want to look at, then use `timeseries` to make the prediction for your chosen measure.

Let's dive in to an example. Suppose that you manage a national chain of coffee shops. You know that sales of some products, like cold drinks, peak in the summer. Sales of other products, like extra shots, aren't affected by the season. How many of each type of drink will you sell next year?

Let's say that your data contains the fields Number of Drinks, Type, and Date Sold. You could use `timeseries` to predict the number of each type of drink that you are likely to sell next year.

```
q = load "coffeeDatabase";
q = filter q by Date_Sold_Year > "2014";
q = group q by ('Date_Sold_Year', 'Date_Sold_Month', 'Type');
q = foreach q generate 'Date_Sold_Year', 'Date_Sold_Month', 'Type', sum('Number_of_Drinks')
  as 'sum_Number_of_Drinks';
q = timeseries q generate 'sum_Number_of_Drinks' as fsum_Number_of_Drinks with
  (partition='Type', length=12, dateCols=('Date_Sold_Year', 'Date_Sold_Month', "Y-M"),
  seasonality= 12);
q = foreach q generate 'Date_Sold_Year' + "~~~" + 'Date_Sold_Month' as
  'Date_Sold_Year~~~Date_Sold_Month', 'Type', fsum_Number_of_Drinks ;
```

Let's look at our `timeseries` function little more closely.

- `partition='Type'`
Partition by type to see the difference between hot drinks, cold drinks, and extra shots.
- `seasonality= 12`
Set seasonality to 12 to specify yearly seasonality. Because `dateCols` groups by month and there are 12 months in a year, `seasonality=12` specifies yearly seasonality. This step is optional because the algorithm can detect the most accurate type of seasonality, but we are confident that our data has yearly seasonality.
- `dateCols=('DateSold_Year', 'DateSold_Month', "Y-M")`
Group the data by type and month.

Here's the resulting forecast.



Wow, it looks like sales of hot coffee and cold drinks will have their best year ever! So you can ramp up your hiring, purchasing, and training and maximize your bottom line.

Fill Missing Dates in a Data Stream with the SAQL Fill Function

You want to analyze your data with interactive graphs and predict future numbers with the `timeseries` function. To do this, your data stream must contain a row for every date. But your data has some date gaps - you didn't close a deal every month and no one bought toboggans in the summer. No problem! Use the SAQL `fill` function to fill the date gaps with null rows, then unlock the power of Analytics.

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 SAQL, you must have an Analytics Platform license.

How: To use `fill`, open up your SAQL editor in the dashboard. Use `foreach` to project your data, then use `fill` to create null rows that contain the missing dates.

Give Communities Users Analytics Insights Under the New License

The new license for Communities, Lightning External Apps Plus, includes access to Einstein Analytics. Users with the new license can access embedded Analytics dashboards in your community. Users with a Customer Community Plus and Partner Community licenses continue to have the same access to Analytics for Communities.

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.

Who: Analytics for Communities is supported in communities but not in portals. Users with a Customer Community Plus, Partner Community, or Lightning External Apps Plus license can use Analytics for Communities.

SEE ALSO:

[Use Lightning External Apps and Lightning External Apps Plus Licenses to Create Custom Digital Experiences](#)

[Salesforce Help: Share Analytics with Communities](#)

Manage the Complete Lifecycle of Analytics Apps with the CLI Analytics Plug-in

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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. Dev Hub is available in Enterprise, Performance, and Unlimited Editions.

Who: To use the Salesforce CLI Analytics Plug-in, you must have an Analytics Platform license.

Why: With the CLI Analytics Plug-in, the Einstein Analytics app development process just got a lot more manageable. Salesforce CLI lets you easily create scratch orgs for controlling the application life cycle—development, testing, sharing, and synchronizing source code, and so on. You do everything you want using the command-line interface and see the results in a scratch org.

Use the scratch org to develop an app in Analytics Studio by importing data to datasets, building dashboards, and connecting everything. Then use Analytics CLI plugin commands to convert the app to a template and download the template JSON files for further refinement, including adding a configuration wizard. You can also share the results of your work with other developers using a version control system. They can push the template JSON files to their own scratch orgs for further testing and development work.

How: Enable Dev Hub in your org, then download [Salesforce CLI](#) and install the Analytics plug-in.

```
sfdx plugins:install @salesforce/analytics
```

For information about setting up Dev Hub and Salesforce CLI, see the [Salesforce DX Setup Guide](#).

For details about Salesforce CLI commands, see the [Salesforce CLI Command Reference](#).

Track Adoption of Einstein Analytics

You can now track Analytics dashboard requests in your event log files. With new fields in the Wave Change event type, you can see where Analytics dashboard requests originate. For field details, see EventLogFile in [Changed Objects](#).

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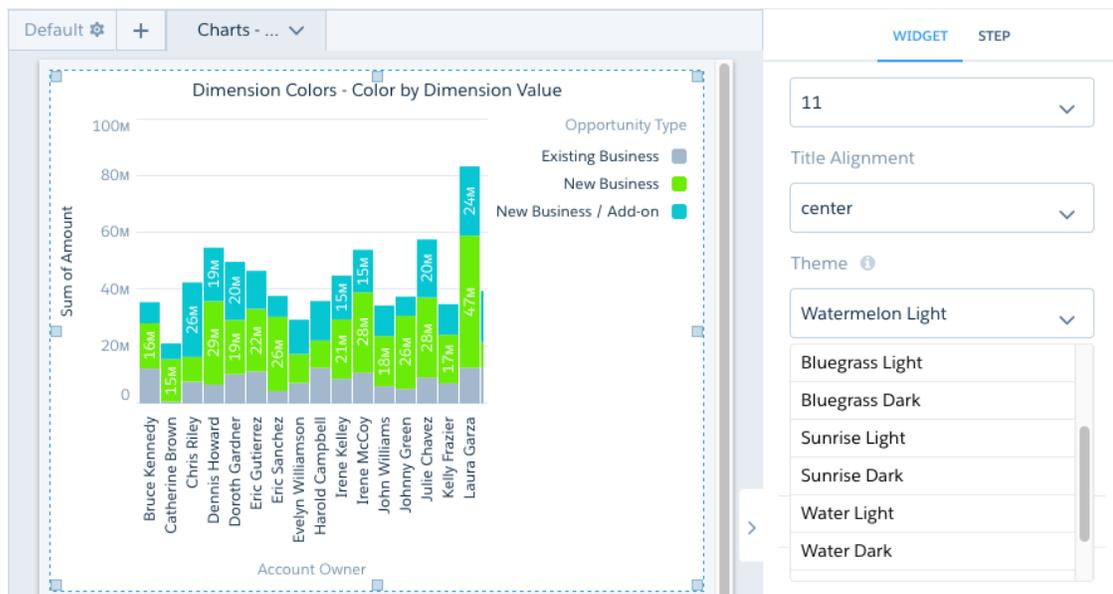
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Learn about the new chart themes, new date presets, and the usability enhancement to the dashboard creation process.

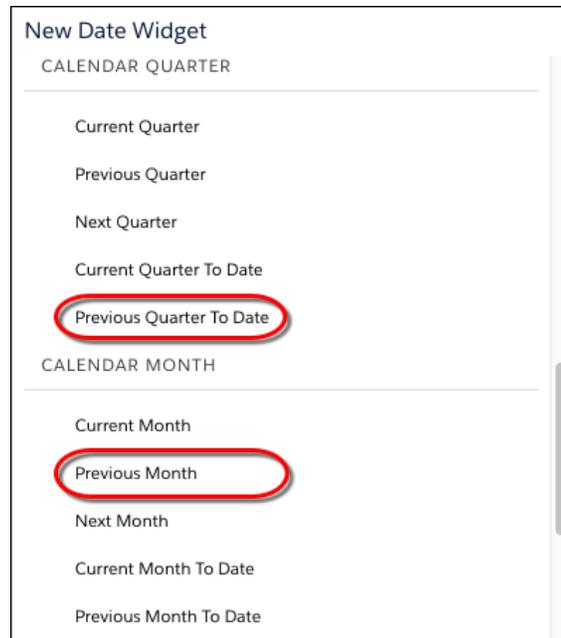
Where: These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Check out the following improvements.

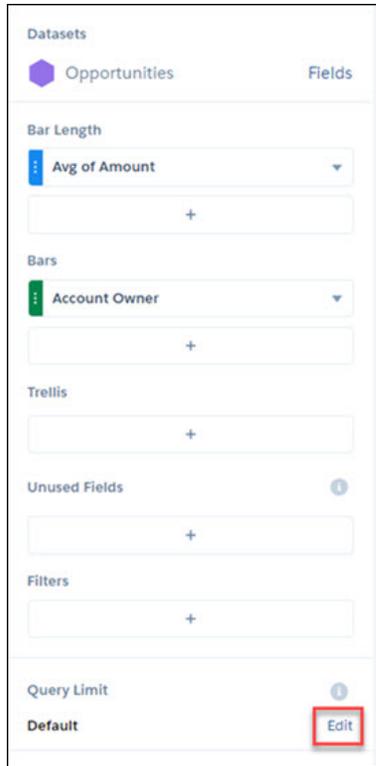
- **New chart themes.** Bring your charts to life by applying one of the new themes: Bluegrass Light, Bluegrass Dark, Sunrise Light, Sunrise Dark, Water Light, Water Dark, Watermelon Light, or Watermelon Dark.



- **More date presets.** You can now select the following date presets in date widgets, global date filters, and explorer filters.
 - Previous Quarter To Date
 - Previous Month
 - Previous Month To Date
 - Last 90 Days
 - Next 90 Days

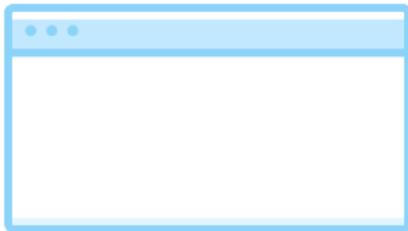


- **Operator picklist in global filters and date widgets.** You can select the following operators in date widgets and global date filters for absolute date filters.
 - Between
 - Less Than or Equal To
 - Greater Than or Equal To
- **New location to set query limits.** Narrowing the size of your query results in a lens is often key to gaining useful business insights. That's why we moved **Set Query Result Limit** to a more convenient location. You can set the query results size from the left panel in the lens.



- **Reorganized dashboard creation screen.** We cleaned up the screen to have a dedicated page that lists all dashboard templates. To see all templates, click **Create** under Dashboard from Template.

Create Analytics Dashboard



Blank Dashboard

Create your dashboard from scratch.

Create



Dashboard from Template

Choose a template to get your dashboard started.

Create

- **New dashboard JSON property for the “Show widget actions” menu.** The optional `showActionMenu` widget property accepts boolean values and indicates whether to show the widget’s action menu. If the property is not specified in the dashboard JSON, the widget shows the action menu. Example:

```

"widgets": {
  "chart_1": {
    "parameters": {
      "step": "Account_Owner_1",
      "visualizationType": "vbar",
      "exploreLink": true,
      "showActionMenu": true,
      "columnMap": {
        "trellis": [],
        "dimensionAxis": [
          "Account_Owner"
        ],
        "plots": [
          "count"
        ]
      },
      "applyConditionalFormatting": true,
      ...
    },
    "type": "chart"
  }
}

```

Analytics Prebuilt Apps: A Plethora of Analytics App Templates, New Template Picker

Choose from an ever-increasing set of templates to get going fast on the Analytics Platform. And a new template picker gives you a great way to find the template that best serves your analytics needs.

IN THIS SECTION:

[App Templates Show You What Einstein Analytics Can Do for You](#)

App templates that meet an increasingly wide variety of business needs speed your Analytics time-to-value and give you a head start for building your own solutions.

[Find the Analytics App You Want to Create Fast with the New Template Picker](#)

View all Einstein Analytics templates in a single, scrollable view that makes it easy to find the app that meets your business needs. After you select a template, you see a new preview page with more details about the template and app dashboard samples. The preview page helps you make sure that you’ve picked the template that’s most useful before you start creating the app.

[New Analytics Templates: Analyze Data from Multiple Orgs in Sales App, Get Instant Insights into B2B Commerce Metrics](#)

For the first time, you can add sales data from multiple orgs and perform analytics against Salesforce B2B Commerce (formerly CloudCraze) data.

[Pricing, Subscription Templates Take Salesforce CPQ Analytics to a New Level](#)

The first Analytics template with built-in Einstein Discovery intelligence, Pricing Analytics recommends ideal discounts for every deal and helps identify underpriced deals. The Subscription Analytics template tracks your renewal business, the value of subscription-based products, and the status of accounts up for renewal.

[The Lead Change Analytics Template Helps You Convert Leads to Business](#)

Lead Trending Analytics gives the sales operations team a great way to track and enhance the lead conversion process.

[The Approval Analytics Template Gives You Instant Insight into Your Approval Processes](#)

If your Salesforce org includes an approval process, then Approval Analytics is for you. The template creates an app that applies the power of Einstein Analytics to your approval data.

[Veeva CRM Customers: Visualize Sales Processes and Performance With Salesforce Analytics for Veeva Template](#)

The Analytics for Veeva Template app gives Veeva CRM customers insights into their sales reps' processes and effectiveness during sales calls.

[Retail Banking Template For Financial Services Cloud Customers Helps Deepen Customer Relationships and Attract New Clients](#)

Create an app from the Retail Banking Analytics Template to put the power of Einstein Analytics into the hands of relationship managers.

App Templates Show You What Einstein Analytics Can Do for You

App templates that meet an increasingly wide variety of business needs speed your Analytics time-to-value and give you a head start for building your own solutions.

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 Einstein Analytics apps from templates, you must have an Analytics Platform license. Some templates require an extra Salesforce license, as specified on the Help page for each template.

Why: Analytics Templates help you get the visualizations you need based on the data you already have. Creating an app from a template imports existing Salesforce data into Einstein Analytics and builds dashboards for you. You don't have to start from a blank slate or deal with the complexities of data modeling or build visualizations to get going. You can go from data to actionable insights in minutes. Don't see what you like right away? Use intuitive platform features to build customizations. Add your own dashboards and lenses and get rid of anything you can't use to make the app your own.

The table shows our initial offering, and we're adding more all the time.

Category	Template
Industry templates meet the analytics needs of specific industries.	<ul style="list-style-type: none"> Health Cloud Analytics—Lets healthcare coordinators identify high-risk patients to make sure that they get the care they need. Financial Advisor Analytics—Applies the power of Analytics to data from the Financial Services Cloud. Fundraising Analytics—Creates an app based on data from the Salesforce Nonprofit Success Pack to help nonprofits build winning fund-raising operations.
Line-of-business templates help you stay on top of business process performance.	<ul style="list-style-type: none"> Campaign Analytics—Shows how marketing campaigns impact the bottom line. Quoting Analytics—Helps Salesforce CPQ customers stay on top of configure-price-quote (CPQ) processes.
Platform and advanced templates make it easier to take advantage of Analytics platform features.	<ul style="list-style-type: none"> Adoption Analytics—Gives you ready-made insight into how your team uses Analytics assets.

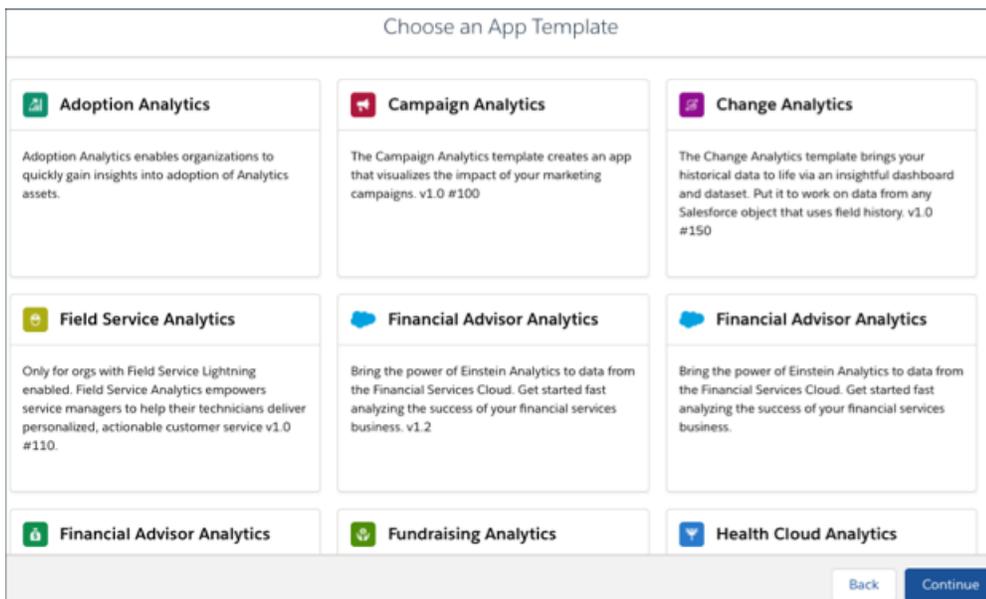
Category	Template
	<ul style="list-style-type: none"> • Change Analytics—Visualizes Salesforce object field history data to show how, when, and where members of your team change data. • Pipeline Analytics—Builds a ready-made waterfall dashboard that shows how the pipeline changes over time. • Snapshot Analytics—Lets you instantly trend data from an existing Einstein Analytics dataset or Salesforce object.

Additionally, you can build apps from our previous broader-purpose templates, including templates for sales, service, event monitoring, B2B marketing, event monitoring, and social case Analytics.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select the template that you want to use, and follow the instructions in the wizard to create your app.

Find the Analytics App You Want to Create Fast with the New Template Picker

View all Einstein Analytics templates in a single, scrollable view that makes it easy to find the app that meets your business needs. After you select a template, you see a new preview page with more details about the template and app dashboard samples. The preview page helps you make sure that you've picked the template that's most useful before you start creating the app.



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Who: To use Analytics templates, you must have an Analytics Platform license.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select the template that you want to use, and follow the instructions in the wizard to create your app.

New Analytics Templates: Analyze Data from Multiple Orgs in Sales App, Get Instant Insights into B2B Commerce Metrics

For the first time, you can add sales data from multiple orgs and perform analytics against Salesforce B2B Commerce (formerly CloudCraze) 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.

Who: To create apps from the Multi Org Sales or B2B Commerce templates, you must have an Analytics Platform license. To create an app from the B2B Commerce templates, you must have installed the Salesforce B2B Commerce (formerly CloudCraze) managed package.

Why: Two new Analytics templates make it easier to apply the power of Analytics to your data. The Multi Org Sales Analytics template lets you create an app that includes data from all the Salesforce orgs you use to manage sales interactions. You get key dashboards that help sales managers unlock the full power of Sales Cloud data—from all your orgs. Select the orgs you want to add to the app in the configuration wizard. The app's interactive dashboards let you choose the org data you want to view. Based on best practice templates, KPIs, and pipeline trending, the app makes it easier to build a winning sales team across your entire organization.

With the B2B Commerce Analytics template, Salesforce B2B Commerce (formerly CloudCraze) customers get a fast way to import your data into Einstein Analytics. Create an app from the template to give your team instant insights into ecommerce data. Track orders, see who's buying what products, learn year-to-date and year-over-year sales revenue, and more—all in a single dashboard.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select the app you want to create, and follow the instructions in the wizard to create your app. Consult Salesforce Help for guidance on setting up and using the apps.

Pricing, Subscription Templates Take Salesforce CPQ Analytics to a New Level

The first Analytics template with built-in Einstein Discovery intelligence, Pricing Analytics recommends ideal discounts for every deal and helps identify underpriced deals. The Subscription Analytics template tracks your renewal business, the value of subscription-based products, and the status of accounts up for renewal.

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 apps from the Pricing Analytics or the Subscription Analytics templates, you must have Analytics Platform and Salesforce CPQ licenses.

Why: Two new Analytics templates just made it easier for Salesforce CPQ customers to get rapid insights from their data. Using Einstein Discovery intelligence, the Pricing Analytics template creates an app that calculates ideal discounts for your quotes. Its dashboard also compares well-priced deals with underpriced deals and shows you potential missed revenue from underpricing. You can also learn about reps who may be underpricing deals so you can coach them on the discounting process.

The Subscription Analytics template applies the power of Einstein Analytics to Salesforce CPQ data about products you sell through subscription contracts. You can see the total value of your subscription contract business and its revenue stream by month and year. You can also track the renewal process and take immediate action right from the dashboard to speed contract renewals.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select the app you want to create, and follow the instructions in the wizard to create your app. Consult Salesforce Help for guidance on setting up and using the apps.

The Lead Change Analytics Template Helps You Convert Leads to Business

Lead Trending Analytics gives the sales operations team a great way to track and enhance the lead conversion process.

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 an app from the Lead Trending Analytics Template, you must have an Analytics Platform license.

Why: The Lead Trending Analytics app visualizes lead conversion metrics to show you how quickly the team converts leads. It shows where leads get stuck and the stages where they sit the longest to help you identify bottlenecks. You can take action right from the dashboard to get deals unstuck and close business faster.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select **Lead Trending Analytics**, and follow the instructions in the wizard to create your app. To create the app, your org must track lead history.

The Approval Analytics Template Gives You Instant Insight into Your Approval Processes

If your Salesforce org includes an approval process, then Approval Analytics is for you. The template creates an app that applies the power of Einstein Analytics to your approval 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.

Who: To create an app from the Approval Analytics Template, you must have Analytics Platform license.

Why: Previously, you could use standard Salesforce reports to see only the current step in the process. Approval Analytics shows the entire history—the number of approvals and rejection, pending approvals, who's approved what, and how long approvals have taken. You can understand trends, identify bottlenecks, and take action right from the app's dashboard to streamline approvals.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select the Approval Analytics template, and follow the instructions in the wizard to create your app. Consult Salesforce Help for guidance on using the app.

Veeva CRM Customers: Visualize Sales Processes and Performance With Salesforce Analytics for Veeva Template

The Analytics for Veeva Template app gives Veeva CRM customers insights into their sales reps' processes and effectiveness during sales calls.

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 an app from the Analytics for Veeva Template, you must have an Analytics Platform license.

Why: The Analytics for Veeva app gathers data about how your pharmaceutical reps conduct sales calls in a single dashboard. You can instantly see if they've used key messages during sales calls, focused on specific products, and left behind samples. You can also see a list of which accounts attended calls and take action on each account right from the dashboard.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select Analytics for Veeva, and follow the instructions in the wizard to create your app.

Retail Banking Template For Financial Services Cloud Customers Helps Deepen Customer Relationships and Attract New Clients

Create an app from the Retail Banking Analytics Template to put the power of Einstein Analytics into the hands of relationship managers.

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 an app from the Retail Banking Analytics Template, you must have an Analytics Platform license and have installed the Financial Services Cloud package.

Why: The Retail Banking app includes key metrics relationship managers can use to move clients up the value chain, grow assets under management (AUM), and cross sell products. Visualizations include client AUM, held away, and market share. Segment your client list according to market segment, and the status of their relationship. And view details about each of your clients, including the total value of their financial accounts.

Also get instant insights into referrals and opportunities to help start new relationships. A handy referral lifecycle chart shows you whether referrals have been contacted and if they're close to converting to client status. You can also see what types of services referrals have expressed interest in. View the pipeline for opportunities to see if the total pipeline value, closed won and lost business, and win rate.

How: Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select Retail Banking Analytics, and follow the instructions in the wizard to create your app.

Analytics Data Integration: Replication Is Now Data Sync, New Amazon S3 Connector, Faster Path to Insights, Enhanced Navigation in Recipes, Enhanced Sharing Inheritance

Data sync is the new name for replication. Load and append multiple CSV files with the Amazon S3 connector. Take your CSV data from file to lens or recipe in a single process. Navigate columns in the recipe editor with the Columns tab. Take control of sharing with enhanced sharing inheritance.

IN THIS SECTION:

[Replication is Now Called Data Sync](#)

Data sync, previously called replication, is how you bring your local Salesforce or external data into Analytics and keep it up to date. We changed the name to better reflect what this process does. We also updated names in the data manager to make it easier to connect to and sync your data.

[Load and Append Multiple CSV Files with the Amazon S3 Connector](#)

If your company stores CSV data in Amazon S3, you now have an easier way to bring it into Analytics. Previously, you had to download the files locally and then upload them manually into Analytics. And to merge the data from multiple files, you had to use the dataflow or a recipe. Now the Amazon S3 connector does it all for you.

[Avoid Data Drift with Periodic Full Sync](#)

When data sync is enabled in your org, Analytics syncs with your local Salesforce objects incrementally. Records are inserted, updated, or deleted to match changes since the previous sync. While this speeds up sync, data in Analytics can become out of sync with your Salesforce objects over time. This can happen when the changes involve formula fields or permanently deleted records. Now you can keep your synced Salesforce objects up to date with a periodic full sync. Select the periodic full sync connection mode, and Analytics ensures that your data gets a regular full refresh. No dataflow updates required.

[Trigger Sync for External Data When You Run a Dependent Dataflow](#)

When you run a dataflow, Analytics checks for referenced external objects that haven't been synced since the dataflow was created or updated. If Analytics finds any, it syncs them for you before running the dataflow. Previously, Analytics only looked for local objects that needed to sync first when you ran a dataflow. You had to manually check for and sync external objects.

[Bring in More Data Through Google Big Query and Heroku Connections](#)

You can now load up to 100 million rows per object through Google Big Query and Heroku connections. We increased this limit from 20 million rows.

[Create Datasets from One Place](#)

You have many ways to create a dataset—upload a file, use a dataflow, create a recipe, for example—but also many places to go to do it. To make it easier for you, we brought all your different options together into a single list.

[Do More from the Dataset Edit Page](#)

The dataset edit page is now the central launchpad for all your dataset tools. More tools are available and everything is at the top of the page within easy reach. Start a recipe, create a story in Einstein Discovery, or explore the data in a lens, all from the dataset edit page.

[Fast-Track Your Data from a CSV File to a Lens, Recipe, or Story](#)

From zero to insights: Upload your external data, and start exploring or preparing in fewer clicks. Track the upload status as you go. Land on the dataset's edit page, from where you can start a recipe or a story in Einstein Discovery, or explore the data.

[Run More Data Jobs](#)

Your dataflows and recipes run as data jobs in Analytics, and as you work with more data, we want to make sure that you can run all these jobs. So we increased the number of data job runs that you can make in a rolling 24-hour period from 40 to 50. Also note: Dataflow and recipe runs that take less than 2 minutes, and data syncs don't count toward this 24-hour dataflow run limit.

[Navigate Recipe Columns with Ease in the Columns Tab](#)

Keeping track of how your data changes as you prepare and transform it is easy in the recipe preview. But as you add columns through transformations or from other datasets, tracking these columns gets harder. This is where the Columns tab comes in: All your visible and hidden columns are available at a glance. You can view metadata and profile information, show and hide columns, and add transformations.

[Search No More for the Column Profile in the Recipe Editor](#)

The column profile pane is now open by default on your recipe preview and on the new Columns tab. It gives you key information about the quality of data in a column and interactive tools to help you improve it.

[Add Data Faster in the Recipe Editor](#)

We streamlined the Add Data process in the recipe editor by cutting out the clutter and reducing the number of screens. Now you can select lookup keys, choose your columns, and preview the results all on a single screen. We also made a few changes to make it easier to work with a lot of columns. We added a value indicator to each column to help you decide which columns you want to keep.

[Share More Sharing Settings in Einstein Analytics](#)

Support for sharing-inheritance rules now includes the user and campaign objects. And sharing inheritance for the opportunity object is now available for users who have access to tens of thousands of records in Salesforce.

Replication is Now Called Data Sync

Data sync, previously called replication, is how you bring your local Salesforce or external data into Analytics and keep it up to date. We changed the name to better reflect what this process does. We also updated names in the data manager to make it easier to connect to and sync your data.

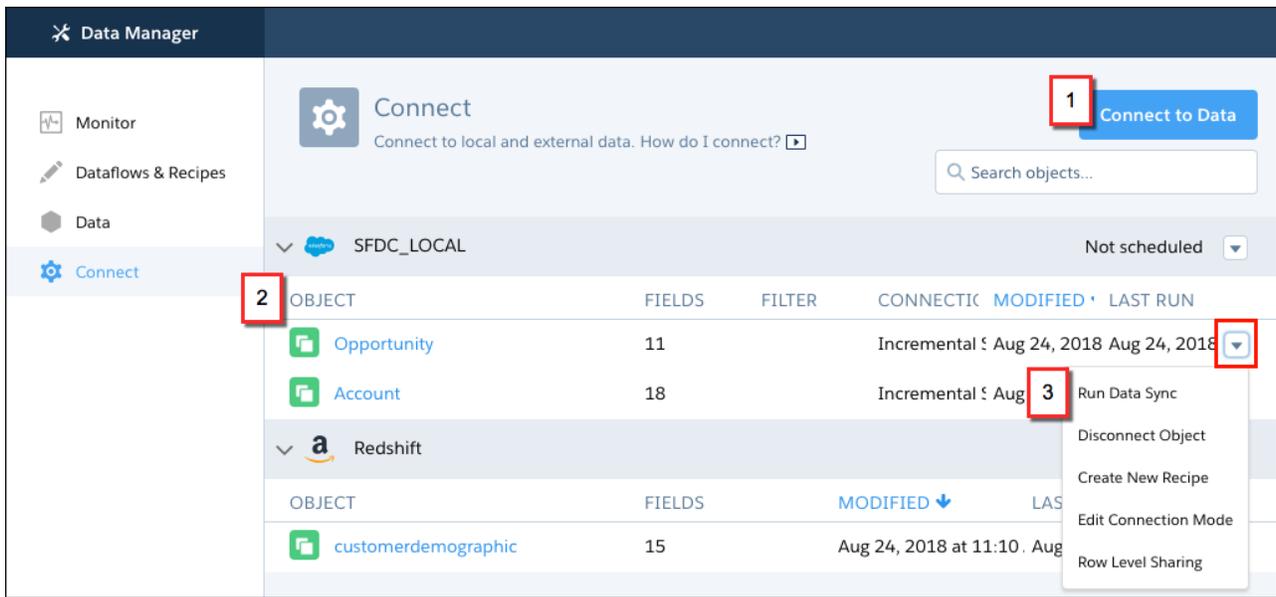
Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Your processes and workflows haven't changed. You just see a few name changes along the way. Let's look at a few.

To enable data sync, go to Analytics Settings as usual.

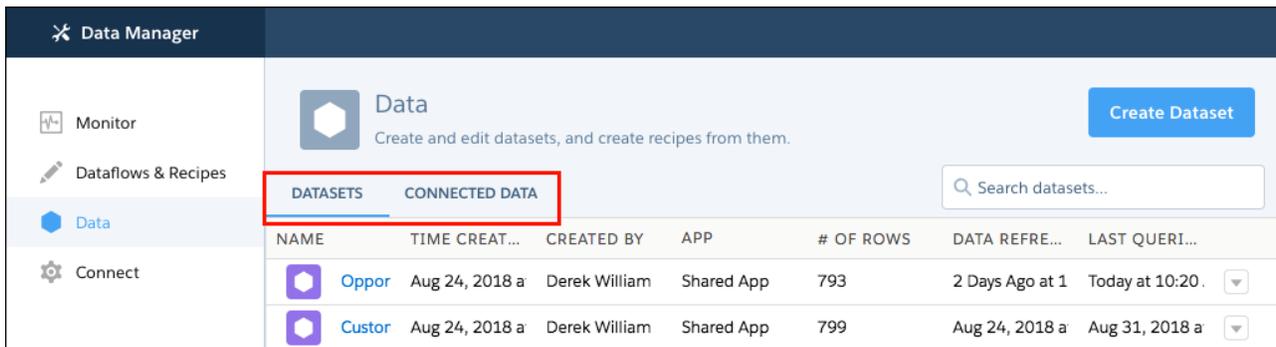


To manage your connections, use the Connect tab in the data manager.



The Connect tab is your launchpad for all data sync and connection tasks. To create or edit connections, or connect to data, click **Connect to Data** (1). Local and external data that you connect to now appear as objects (2) for each connection. And you now run data sync from the object menu (3) or the connection menu.

When you connect to and sync an object, the data is available in the usual places for use in your recipes and dataflows. In the data manager, one place was the Datasets tab. To make things clearer, we renamed this tab "Data" and changed the subtab names to make it easier to find what you need.



When selecting data, such as here in the data manager or in a recipe, you choose between datasets and connected data. Datasets are ready to be explored in lenses and dashboards. Connected data is local or external data that you sync in Analytics, ready to be turned into a dataset in a recipe or dataflow.

Here's a round up of the main name changes you'll see as you follow a clearer path to bringing your data into Analytics.

Previous Name	New Name
Replication	Data Sync
Datasets (data manager tab)	Data

Previous Name	New Name
Setup (data manager tab)	Connect
Set Up Replication (button)	Connect to Data
Run Replication	Run Data Sync
Replicated Dataset	Connected Data

Load and Append Multiple CSV Files with the Amazon S3 Connector

If your company stores CSV data in Amazon S3, you now have an easier way to bring it into Analytics. Previously, you had to download the files locally and then upload them manually into Analytics. And to merge the data from multiple files, you had to use the dataflow or a recipe. Now the Amazon S3 connector does it all for you.

Where: This feature 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 create connections, you must have an Analytics Platform license and either the Add Analytics Remote Connections or the Manage Analytics permission.

Why: Let's look at an example. You provide a callback support service for customers on your website. Calls are logged automatically by week in separate .csv files in monthly folders on Amazon S3. Here are the weekly files in the January folder.

Amazon S3 > callback-logs / Call_Back_Logs_2018 / Call_Back_Logs_2018_Jan

Overview

🔍 Type a prefix and press Enter to search. Press ESC to clear.

📁 Upload + Create folder More ▾ US West (N. California) 🔄

Viewing 1 to 4

<input type="checkbox"/>	Name ↑	Last modified ↑	Size ↑	Storage class ↑
<input type="checkbox"/>	📄 Callback Log 2018 Jan W1.csv	Aug 7, 2018 6:15:57 PM GMT-0700	43.5 KB	Standard
<input type="checkbox"/>	📄 Callback Log 2018 Jan W2.csv	Aug 7, 2018 6:16:11 PM GMT-0700	43.5 KB	Standard
<input type="checkbox"/>	📄 Callback Log 2018 Jan W3.csv	Aug 7, 2018 6:16:37 PM GMT-0700	43.5 KB	Standard
<input type="checkbox"/>	📄 Callback Log 2018 Jan W4.csv	Aug 7, 2018 6:16:56 PM GMT-0700	43.5 KB	Standard

Using the Amazon S3 connector, you can create a connection to this folder, and load all the files when the connection runs. Analytics appends the rows from all the files in a single object.

OBJECT	FIELDS
Account	7
User	3
Opportunity	7

NAME	FIELDS
Call_Back_Logs_2018_Jan	4

How: Create connections with the Amazon S3 connector just like you do with other connectors on the Connect tab of the data manager. However, because you are connecting to a folder rather than an object, consider these folder requirements before you create a connection.

- The folder path that you specify in the connection settings must start with the bucket name and can't include the folder that you want to connect to. Let's use the callback logs as an example. The path to the January folder appears above the folder when you open it in S3.

The folder path in S3 starts with the bucket name (1), followed by a folder name (2). In this example, the January files are in a subfolder (3), which is the folder that you want to connect to. When you specify this folder path in the connection settings, you include only the bucket and parent folder, not the folder that you're connecting to.

- Folder names in S3 must follow developer naming conventions, with no spaces or special characters.
- Rename one of the files in the S3 folder to `schema_sample.csv`. Analytics uses this file to detect the schema of the .csv data.

Name ↑
Callback Log 2018 Jan W2.csv
Callback Log 2018 Jan W3.csv
Callback Log 2018 Jan W4.csv
schema_sample.csv

When you use the connection to connect to a folder, Analytics shows a preview of the data in the `schema_sample.csv` file. From this preview you can view and change field attributes for all the files that you are loading from the folder.

Preview Source Data

Replication Settings
CallLogs > Call_Back_Logs_2018_Jan

id	number	datetime	duration	callcenter
1	411-570-8444	2018-01-05 14:57:39	37	West
2	750-118-2967	2018-01-05 14:53:22	30	West
3	108-448-2853	2018-01-05 09:26:55	35	West
4	605-266-7203	2018-01-04 16:20:28	81	East
5	290-139-1317	2018-01-06 16:16:16	75	East
6	864-475-5997	2018-01-03 21:56:17	48	East
7	914-291-2293	2018-01-01 00:30:06	1	Mid
8	539-353-0287	2018-01-02 11:45:43	53	West
9	873-257-5419	2018-01-03 07:09:29	58	East
10	635-706-6967	2018-01-01 18:14:24	55	East
11	754-703-4539	2018-01-05 14:11:58	11	Mid
12	644-143-6675	2018-01-02 19:01:20	95	West
13	417-877-6558	2018-01-03 14:19:21	83	Mid

Field Attributes

id

API Name: id

Field Label

id

Field Type*

Numeric

Numeric

Text

Settings for Numeric Field

- Each file that you want to load from the S3 folder must have a file name ending in `.csv`. Each file must also have a header row and the same fields as the `schema_sample.csv` file. A file can have extra fields, but these fields are not loaded. Analytics ignores files that don't meet these requirements.
- Field names in the header row of each file must follow developer naming conventions, with no spaces or special characters.
- You can load only whole files, not parts of files.

Avoid Data Drift with Periodic Full Sync

When data sync is enabled in your org, Analytics syncs with your local Salesforce objects incrementally. Records are inserted, updated, or deleted to match changes since the previous sync. While this speeds up sync, data in Analytics can become out of sync with your Salesforce objects over time. This can happen when the changes involve formula fields or permanently deleted records. Now you can keep your synced Salesforce objects up to date with a periodic full sync. Select the periodic full sync connection mode, and Analytics ensures that your data gets a regular full refresh. No dataflow updates required.

Where: This feature 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 edit connection mode, you must have the Manage Analytics permission.

How: The default connection mode for local Salesforce objects is incremental. To turn on periodic full sync, on the Connect tab in the data manager, select **Edit Connection Mode** from the object's menu.

The screenshot shows the 'Data Manager' interface with the 'Connect' tab selected. Under the 'SFDC_LOCAL' connection, a table lists the following objects and their configurations:

OBJECT	FIELDS	FILTER	CONNECTION MODE	MODIFIED	LAST RUN
Account	7		Incremental Sync	Aug 27, 2018 at 12:32 PM	Aug 27, 2018 at 12:32 PM
User	3		Incremental Sync	Aug 27, 2018 at 12:25 PM	Aug 27, 2018 at 12:30 PM
Opportunity	7		Incremental Sync	Aug 27, 2018 at 12:25 PM	Aug 27, 2018 at 12:30 PM

A context menu is open over the 'Account' row, showing options: Run Data Sync, Disconnect Object, Create Recipe, **Edit Connection Mode** (highlighted), and Row Level Sharing.

In the edit connection mode dialog, select **Periodic Full Sync**, and click **Save**. That's it. We'll do the full sync during the first scheduled sync every Friday after 11 PM in your org's time zone.

The 'Edit connection mode' dialog box contains the following text and options:

Select how Analytics syncs with the source Salesforce object when sync runs

- Incremental Sync**
Update records to match changes in the Salesforce object since the previous sync. Because only changes are included, the sync runs faster.
- Periodic Full Sync**
Sync records incrementally and periodically overwrite all records with records in the Salesforce object. Use this mode to prevent the data drift that can occur over time with incremental sync.

Buttons: Cancel, Save

Trigger Sync for External Data When You Run a Dependent Dataflow

When you run a dataflow, Analytics checks for referenced external objects that haven't been synced since the dataflow was created or updated. If Analytics finds any, it syncs them for you before running the dataflow. Previously, Analytics only looked for local objects that needed to sync first when you ran a dataflow. You had to manually check for and sync external objects.

Where: This feature 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: Analytics triggers a sync for external objects referenced in the digest nodes in a dataflow when you create or update the dataflow.

Bring in More Data Through Google Big Query and Heroku Connections

You can now load up to 100 million rows per object through Google Big Query and Heroku connections. We increased this limit from 20 million rows.

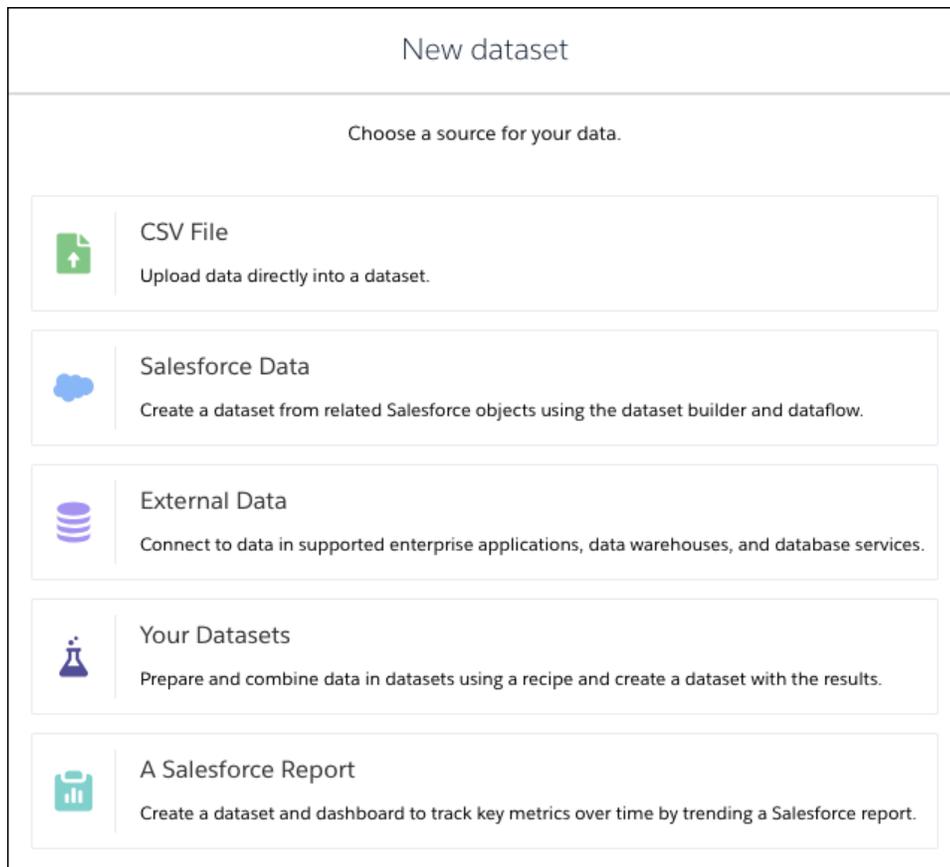
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Create Datasets from One Place

You have many ways to create a dataset—upload a file, use a dataflow, create a recipe, for example—but also many places to go to do it. To make it easier for you, we brought all your different options together into a single list.

Where: This feature 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: In the Analytics Studio, click **Create**, and select **Dataset**. Here you see all your options based on your permissions. Select one and go.



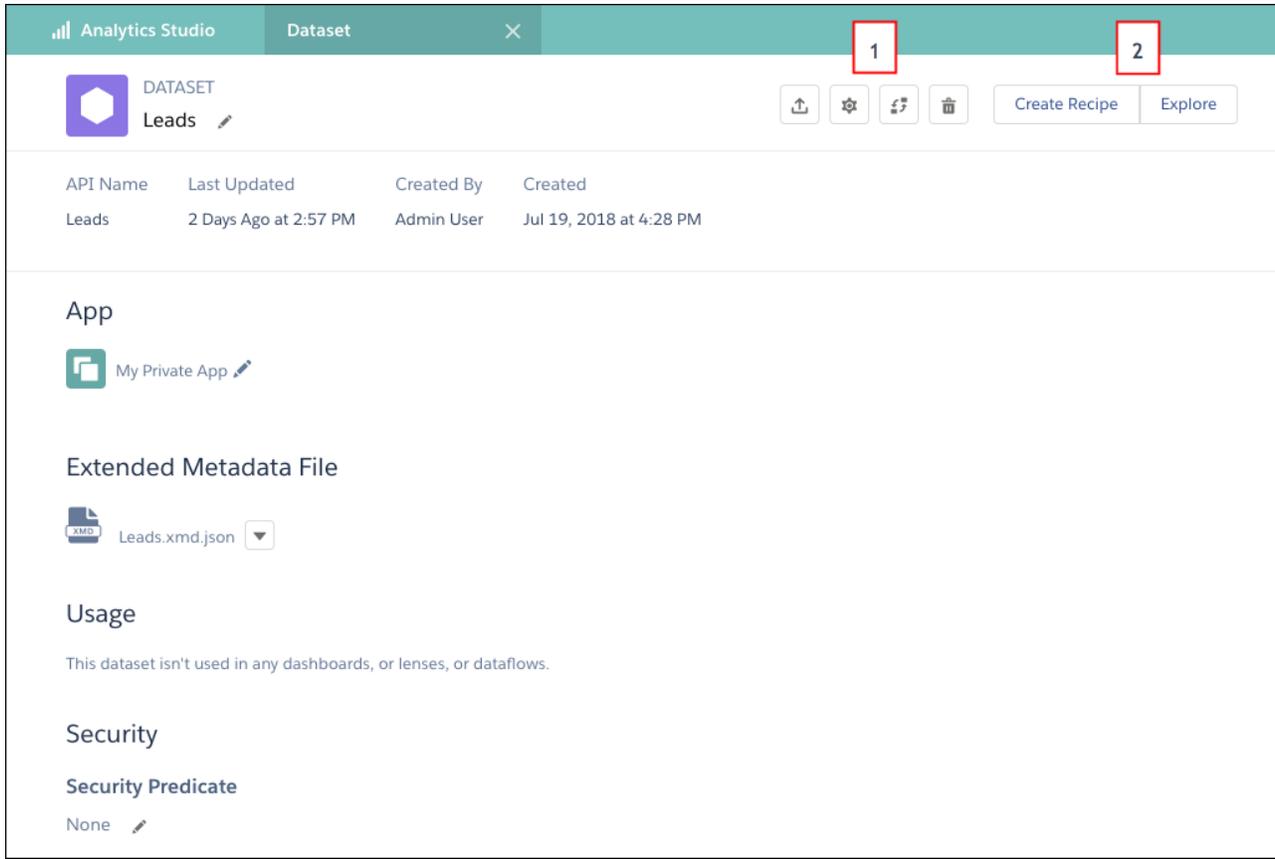
Do More from the Dataset Edit Page

The dataset edit page is now the central launchpad for all your dataset tools. More tools are available and everything is at the top of the page within easy reach. Start a recipe, create a story in Einstein Discovery, or explore the data in a lens, all from the dataset edit page.

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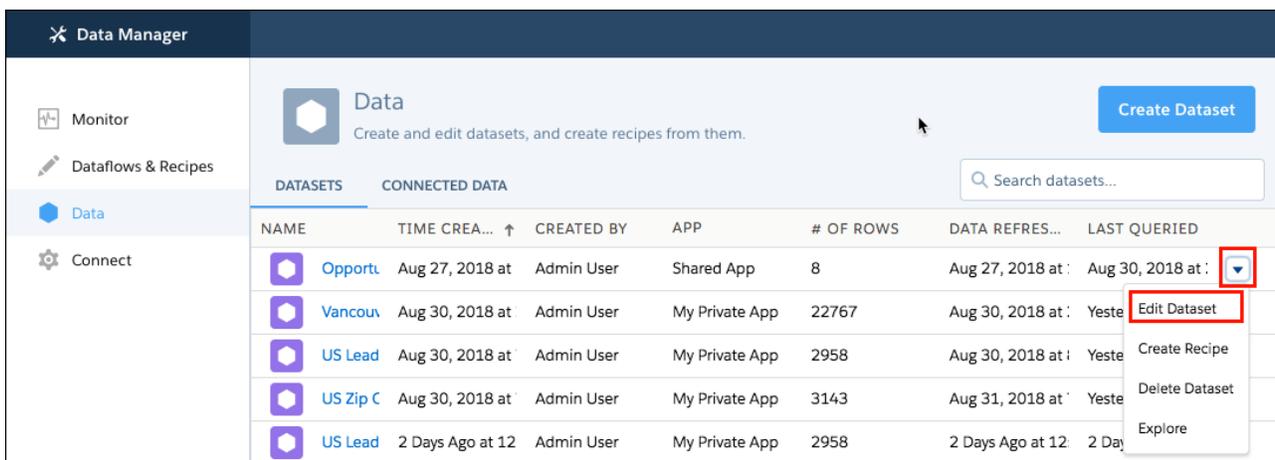
Who: To create a recipe, you must have the Edit Dataset Recipes permission. To create a story, Einstein Discovery must be enabled in your org and you must have the Create and Update Einstein Discovery Stories permission.

Why: We put all the important tasks together in one logical place, a dataset's edit page, which you can get to from both the Analytics Studio and the data manager.



Your administrative tools are still here, but in a new place with new buttons (1). And now you can jump straight into a recipe, lens, or story (2).

How: There's no change to the way you get to the dataset edit page. Select **Edit Dataset** from the dataset's menu in the data manager or Analytics Studio. You also land on the dataset edit page when you finish uploading a .csv file in Analytics.



SEE ALSO:

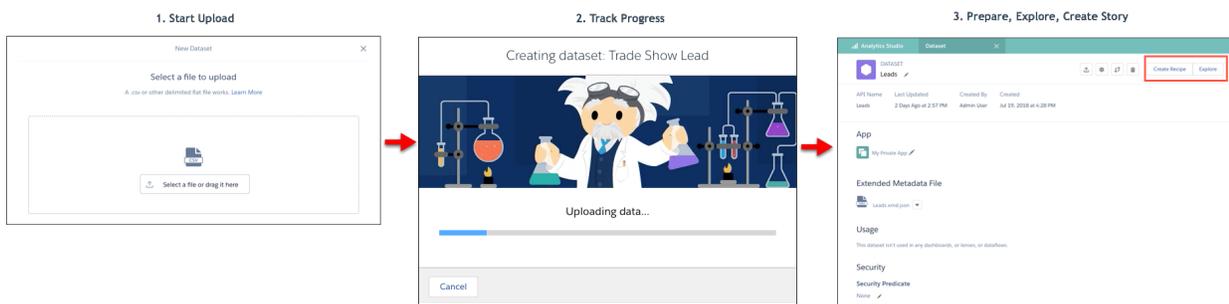
[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Fast-Track Your Data from a CSV File to a Lens, Recipe, or Story

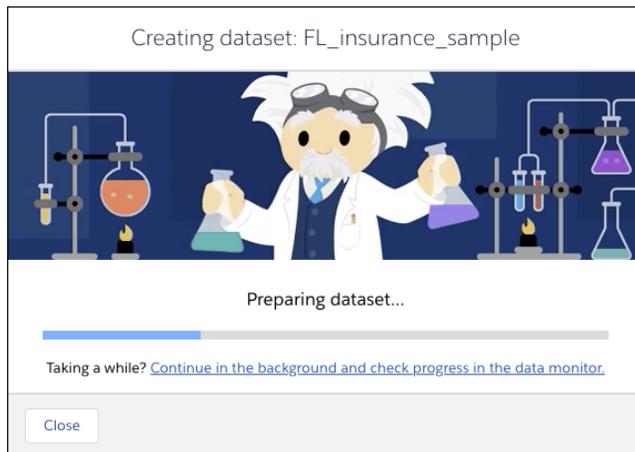
From zero to insights: Upload your external data, and start exploring or preparing in fewer clicks. Track the upload status as you go. Land on the dataset's edit page, from where you can start a recipe or a story in Einstein Discovery, or explore the data.

Where: This feature 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: Now, what used to involve numerous steps in numerous places, you can do in one process, in one place.



How: You still upload your .csv file from the Analytics Studio or data manager. When the upload starts, you see the status dialog, where you can track the dataset creation progress.



When the data has been uploaded, the dataset is queued, prepared, and then created. During these stages, you can click the **Continue in the background and check progress in the data monitor** link to leave the process running in one tab and jump to the data manager in a new tab. When the process finishes, the edit page of the new dataset opens, from where you can start exploring and preparing.

 **Note:** If you close the progress dialog, dataset creation continues in the background, but the dataset edit page doesn't open automatically when the process is finished.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Run More Data Jobs

Your dataflows and recipes run as data jobs in Analytics, and as you work with more data, we want to make sure that you can run all these jobs. So we increased the number of data job runs that you can make in a rolling 24-hour period from 40 to 50. Also note: Dataflow and recipe runs that take less than 2 minutes, and data syncs don't count toward this 24-hour dataflow run limit.

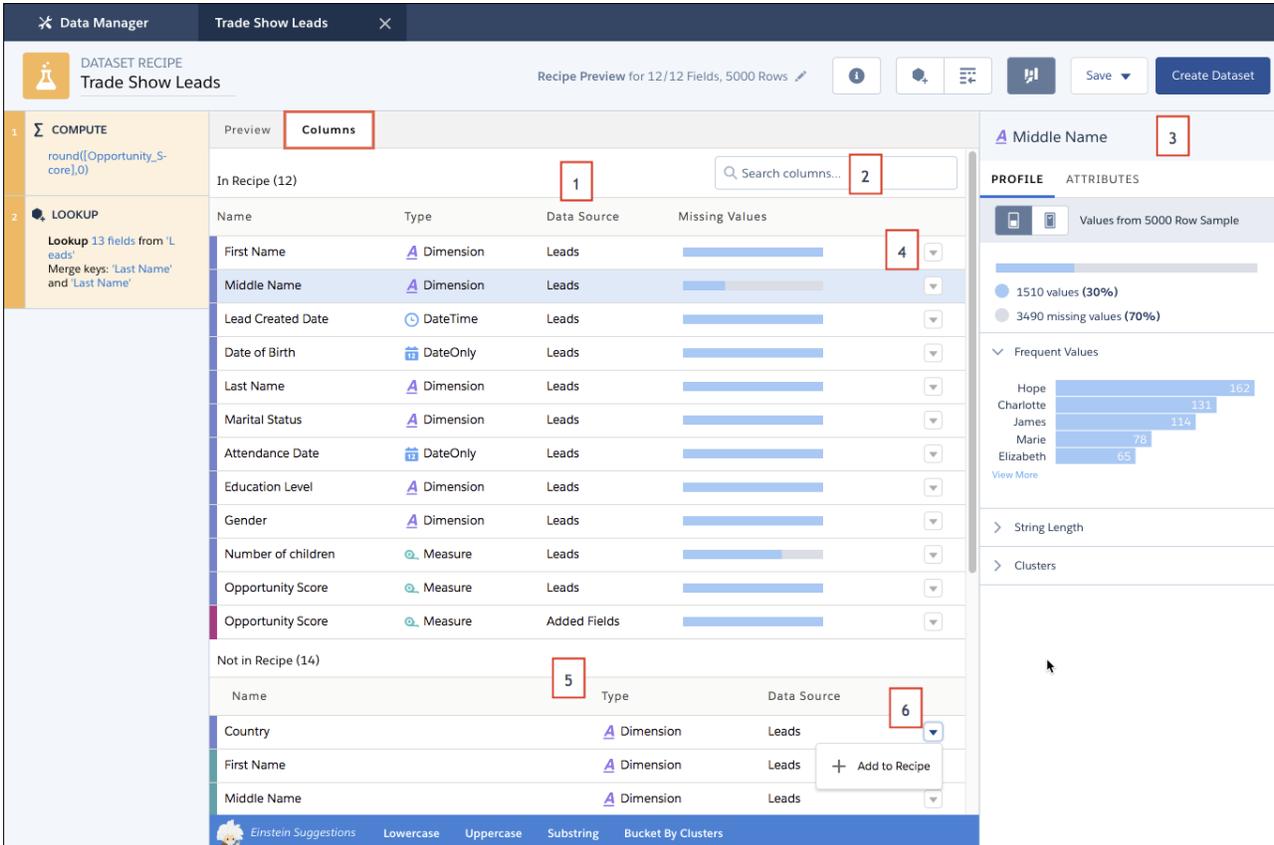
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Navigate Recipe Columns with Ease in the Columns Tab

Keeping track of how your data changes as you prepare and transform it is easy in the recipe preview. But as you add columns through transformations or from other datasets, tracking these columns gets harder. This is where the Columns tab comes in: All your visible and hidden columns are available at a glance. You can view metadata and profile information, show and hide columns, and add transformations.

Where: This feature 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: To get started, click the **Columns** tab at the top of the recipe editor.



The screenshot displays the 'Columns' tab in the 'Trade Show Leads' dataset recipe editor. The interface is divided into several sections:

- Columns Tab:** A red box labeled '1' highlights the 'Columns' tab at the top of the recipe editor.
- Search:** A search bar labeled 'Search columns...' is highlighted with a red box labeled '2'.
- Columns List:** A table lists columns with columns for Name, Type, Data Source, and Missing Values. A dropdown arrow for the 'Missing Values' column for 'Middle Name' is highlighted with a red box labeled '4'.
- Profile Information:** The 'Middle Name' column is selected, and its profile information is shown on the right. A red box labeled '3' highlights the 'Middle Name' header in the profile section.
- Not in Recipe Section:** A section titled 'Not in Recipe (14)' is highlighted with a red box labeled '5'. It lists columns not currently in the recipe, such as 'Country', 'First Name', and 'Middle Name'. A red box labeled '6' highlights the '+ Add to Recipe' button next to the 'Middle Name' entry.

All the columns included in your recipe appear first (1), color-coded by source, with their type, the dataset they come from, and a missing values indicator. Can't see the column that you want? Start typing the name in the search box (2) to narrow down the list. Click a column to see its profile and attributes (3), or open its menu (4) to hide or transform it.

Columns that you've hidden in the recipe appear in a separate list (5). To add one of these columns, select **Add to Recipe** from its menu (6).

Search No More for the Column Profile in the Recipe Editor

The column profile pane is now open by default on your recipe preview and on the new Columns tab. It gives you key information about the quality of data in a column and interactive tools to help you improve it.

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: The column profile is such a great tool, so we made it more accessible to give you more chances to use it.

How: The column profile pane is now open by default on your recipe preview and on the new Columns tab.

The screenshot shows the 'Data Manager' interface for a 'Trade Show Leads' dataset. The 'Columns' tab is active, displaying a list of columns: First Name, Middle Name, Lead Created Date, and Date of Birth. The 'First Name' column is selected, and its profile is shown on the right. The profile includes a bar chart showing 'Values from 5000 Row Sample' with 5000 values (100%) and 0 missing values (0%). The 'Frequent Values' section lists names like Amelia, Andrea, Alyssa, Andrew, and Angel with their respective counts. A search box (2) is visible in the column list, and a values indicator (3) is shown for the 'First Name' column. The profile panel (1) is also visible on the right.

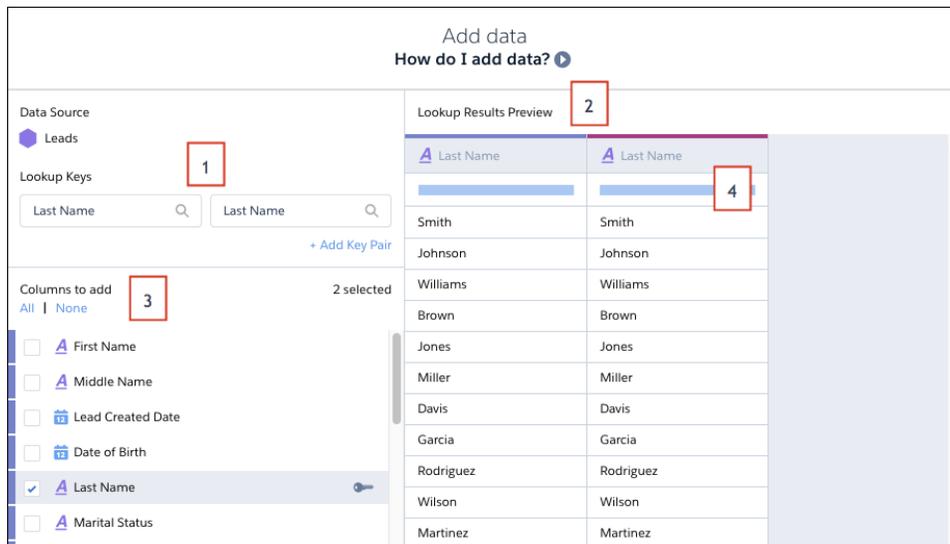
Click a column to see its profile on the right of the editor (1). If you've closed the profile panel, you can now open it right from the menu of the column that you're working on (2) without losing your focus. We also added a values indicator (3) to each column to give you an at-a-glance view of the quality of your data without clicking through each column.

Add Data Faster in the Recipe Editor

We streamlined the Add Data process in the recipe editor by cutting out the clutter and reducing the number of screens. Now you can select lookup keys, choose your columns, and preview the results all on a single screen. We also made a few changes to make it easier to work with a lot of columns. We added a value indicator to each column to help you decide which columns you want to keep.

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: Click the Add Data () button, and select the dataset that has the data that you want to add. In the Add Data dialog, Analytics selects a possible lookup key pair if it can.



You can change the detected lookup key fields (1) or add up to four more pairs to improve matching. Merge key columns show up by default in the results preview (2). To include more columns in the recipe, select them from the Columns to add list (3). Each column that you include appears in the results preview with a value indicator (4) to give you an idea of the data quality in the column. Hover over the bar to see how many values and missing values the column has. You might choose not to include low-quality fields with not many values. That's it. Click **Done** when you're done.

 **Note:** To make the results preview easier to navigate, Analytics includes only the lookup key columns. Make sure that you select the current recipe columns and the new columns that you want to include in the recipe.

Share More Sharing Settings in Einstein Analytics

Support for sharing-inheritance rules now includes the user and campaign objects. And sharing inheritance for the opportunity object is now available for users who have access to tens of thousands of records in Salesforce.

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: As a Salesforce administrator, you likely set up sharing rules so that your users have access that's appropriate to their roles. Sharing inheritance creates a bridge between your Salesforce security model and Einstein Analytics by applying Salesforce sharing rules in Einstein Analytics.

When your dataflow runs, it uses the inherited sharing rules to pre-calculate record access. This approach is much more efficient than calculating record access for each request as it is made.

 **Important:** If your dataflow doesn't do a full extraction each time it runs, be sure to evaluate whether "security drift" is a risk for the datasets you bring into Einstein Analytics. Consider whether to use periodic full sync.

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 turned on by default in new orgs. To enable sharing inheritance in an existing org, search for and select **Inherit sharing from Salesforce** in Setup.

To use sharing inheritance, configure the feature on a dataflow or dataset.

Analytics Mobile Apps: Push Notifications, Dynamic Pages, Offline (pilot), New Charts, and New Widgets

In addition to push notifications, dynamic pages, and offline (pilot), new charts and widgets are now available on mobile.

IN THIS SECTION:

[Experience Dynamic Pages and Conditional Formatting on Einstein Analytics for iOS and Android](#)

Get dynamic pages, conditional formatting, and new charts and widgets, which make getting insights on mobile more straightforward.

[Additional Enhancements in Einstein Analytics for iOS](#)

Get the new, dynamic home experience, including push notifications, new charts with richer visualizations, and more.

[Additional Enhancements in Einstein Analytics for Android](#)

Get the exploration experience, access new charts, and analyze your data in new ways.

Experience Dynamic Pages and Conditional Formatting on Einstein Analytics for iOS and Android

Get dynamic pages, conditional formatting, and new charts and widgets, which make getting 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.

- Dynamic Pages: Seamless, animated transitions between pages give new life to dashboards.



- Performance Improvements: Customized dashboards that use SAQL steps now load faster!
- Toggle Widget: The widget now matches its desktop counterpart.
- Conditional Formatting: See status at a glance with automatically highlighted chart elements.

- Navigation Widget: Journey purposefully through dashboards.
- List Widgets: Utilize List Widgets that more closely match desktop Analytics, with 3 new formats.
- Angular Gauge Chart: Track progress toward goals.
- Geo Map: Locate your geographical data.
- Stacked Pyramid Chart: See how your data measures up.
- Origami Chart: Unfold your data.
- Parallel Coordinates Chart: Compare data groupings.

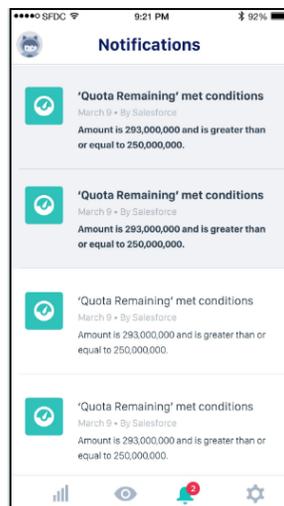
Additional Enhancements in Einstein Analytics for iOS

Get the new, dynamic home experience, including push notifications, new charts with richer visualizations, and more.

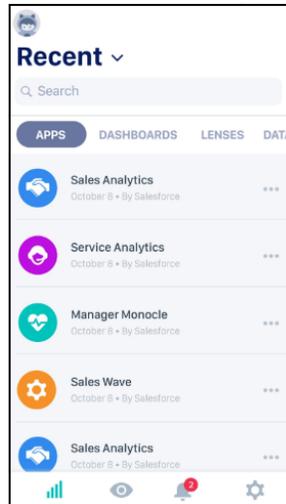
Where: These changes apply to Einstein Analytics for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Why: Enhancements in the latest releases include the following features.

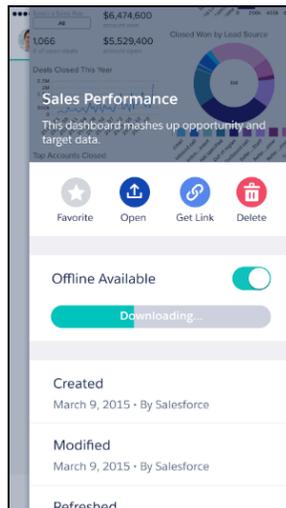
- Push Notifications: Get notified of the most critical changes and milestones in your business. You can also create and manage notifications right from the mobile app.



- New Charts: Every desktop chart is now supported on iOS, including Rating, Calendar Heatmap, and Sankey.
- Better Charts: Experience richer visualizations with improved text rendering for charts.
- Home Screen Refresh: Navigate to your Analytics assets effortlessly with the light and intuitive home screen. We've updated the tab bar, navigation, filters, and settings.



- (Pilot) Offline: View and explore your datasets, lenses, and dashboards without internet connectivity.



-  **Note:** We provide Analytics Offline to selected customers through a pilot program that requires agreement to specific terms and conditions. Analytics Offline 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 Analytics Offline.

How: Analytics is available for devices running iOS 10 and later. For the latest enhancements, download Einstein Analytics from the App Store.

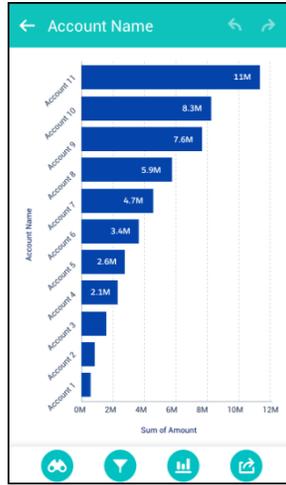
Additional Enhancements in Einstein Analytics for Android

Get the exploration experience, access new charts, and analyze your data in new ways.

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.

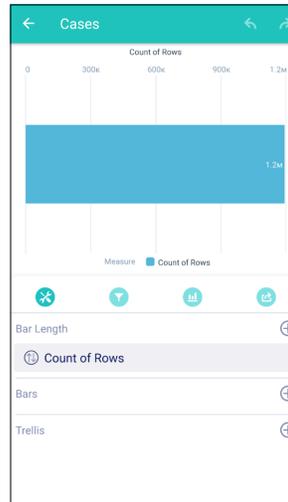
Why: Enhancements in the latest releases include the following features.

- Explorer on Android: Build meaningful visualizations, and analyze your data in new ways! Open datasets, and explore and filter data in lenses with the new build, filter, and view tools for data insights.



A screenshot of the "DATASETS" tab in the Einstein Analytics interface. The tab is highlighted in teal. Below the tab are several dataset entries, each with a purple hexagonal icon, a title, and a subtitle. The entries are: "Cases" (14h ago - By Integration User), "Work" (25m ago - By Integration User), "BLT_WithCloud" (11h ago - By integration User), "Full List of Tests" (Aug 30, 2018 - By Piranavan Selvanandan), "90g_main" (Aug 29, 2018 - By Dan Silver), "dataset_masterKevin" (Sep 5, 2018 - By Kevin Fambrough), and "Query_Traffic_EM" (Sep 5, 2018 - By Kevin Fambrough).

Dataset Name	Created/Updated	By
Cases	14h ago	By Integration User
Work	25m ago	By Integration User
BLT_WithCloud	11h ago	By integration User
Full List of Tests	Aug 30, 2018	By Piranavan Selvanandan
90g_main	Aug 29, 2018	By Dan Silver
dataset_masterKevin	Sep 5, 2018	By Kevin Fambrough
Query_Traffic_EM	Sep 5, 2018	By Kevin Fambrough



- New Charts: Custom maps and the Calendar Heatmap are now supported on Android.
- Bug fixes, performance improvements, and other usability enhancements.

How: Analytics is available for devices running Android 5 or later. For the latest enhancements, download Einstein Analytics from Google Play™.

Einstein Discovery: Integrated in Einstein Analytics

Einstein Discovery is fully integrated into Einstein Analytics. Now you create stories from Analytics datasets, and navigate stories, investigate insights, visualize data, and discover predictions—all within the familiar Einstein Analytics interface. Learn to enhance your models by examining metrics that reveal their statistical basis and performance, and manage goals and models that you have deployed to Salesforce using the new Model Manager.

- 📌 **Note:** Einstein Discovery in Analytics represents a major advance over the previous version of Einstein Discovery (now called *Einstein Discovery Classic*). If you currently use Einstein Discovery Classic and you want to move to Einstein Discovery in Analytics, contact your Salesforce representative.

IN THIS SECTION:

[Create Einstein Discovery Stories from Einstein Analytics Datasets](#)

Einstein Discovery stories are now based on the same datasets used for Einstein Analytics lenses, dashboards, and recipes.

[Navigate Einstein Discovery Stories and Insights in the Einstein Analytics Interface](#)

With Einstein Discovery fully integrated into the Einstein Analytics interface, you can navigate stories, investigate insights, and discover predictions all in one place. Quickly surface story insights with clickable links to investigate what happened and why it happened, explore predictions and improvements, and learn from variable comparisons. You can even pin the insights that you want to remember for later.

[Manage Einstein Discovery Goals and Models Deployed to Salesforce](#)

If you deploy models to Salesforce, you can now use the Model Manager to deployed models and the goals with which they are associated. Every Einstein Discovery story includes a desired goal to maximize or minimize the outcome. For example, a story goal can be to increase the margin (maximize) or decrease the per-unit cost (minimize). A *model* includes only the following parts of a story: explanations, predictions, and recommendations.

[Improve Your Einstein Discovery Models by Investigating Their Metrics and Performance](#)

Model metrics help you understand your models' statistical basis and performance so that you can know where and how to enhance it for even better results.

Create Einstein Discovery Stories from Einstein Analytics Datasets

Einstein Discovery stories are now based on the same datasets used for Einstein Analytics lenses, dashboards, and recipes.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics and Einstein Discovery in Analytics are available for an extra cost in Enterprise, Performance, and Unlimited Editions. Also available in Developer Edition.

Who: To create a story, you need the Create and Update Einstein Discovery Stories user permission.

How: In Analytics Studio, select the Datasets subtab to view datasets to which you have access. Click the dropdown menu on the top-right side of the dataset you want to use, and click **Create Story**.

Datasets			
TITLE	APP	CREATED BY	DATA REFRESHED
AcquiredAccount	My Private App		Sep 2, 2018 at 9:07 AM
MySampleDataset	My Private App		Aug 3, 2018

- Edit
- Create Story**
- Create Recipe

Einstein Discovery launches the Story Setup wizard.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Navigate Einstein Discovery Stories and Insights in the Einstein Analytics Interface

With Einstein Discovery fully integrated into the Einstein Analytics interface, you can navigate stories, investigate insights, and discover predictions all in one place. Quickly surface story insights with clickable links to investigate what happened and why it happened, explore predictions and improvements, and learn from variable comparisons. You can even pin the insights that you want to remember for later.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics and Einstein Discovery in Analytics are available for an extra cost in Enterprise, Performance, and Unlimited Editions. Also available in Developer Edition.

Who: To navigate stories and pin insights, you need the Use Einstein Discovery user permission.

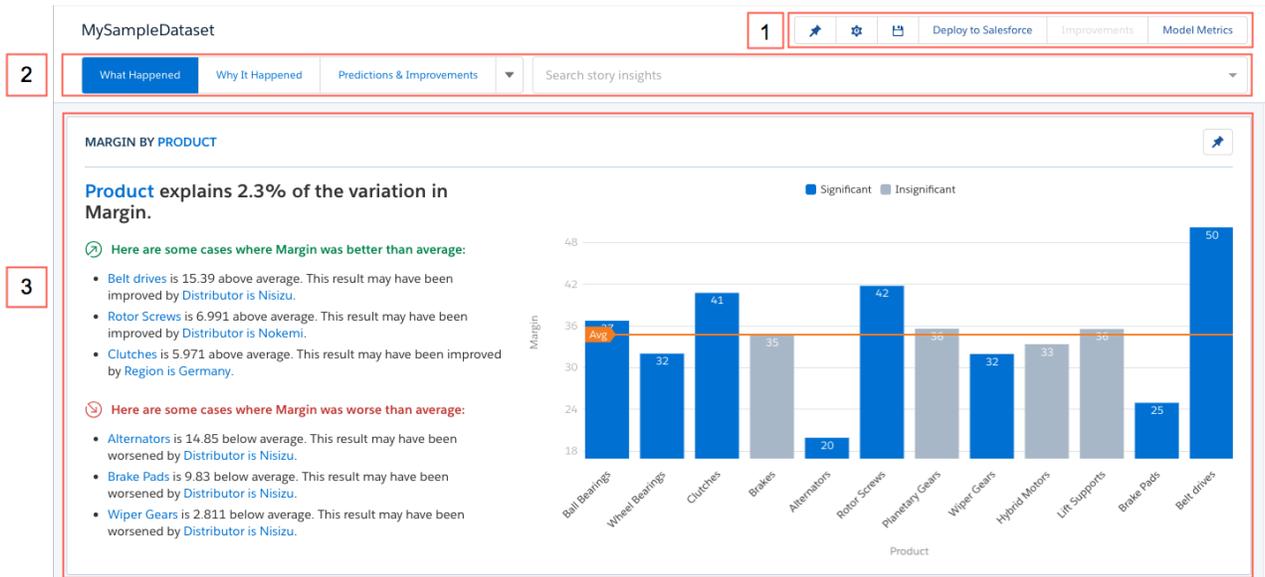
How:

1. In Analytics Studio, select the Stories subtab to see the stories to which you have access.

Navigation Tabs						
TITLE	STATUS	APP	OUTCOME	CREATED BY	LAST MODIFIED BY	
AcquiredAccount	Success	My Private App	Maximize Ownership (Public)		Today at 1...	
MySampleDataset	Success	My Private App	Maximize Margin		Aug 30, 201...	

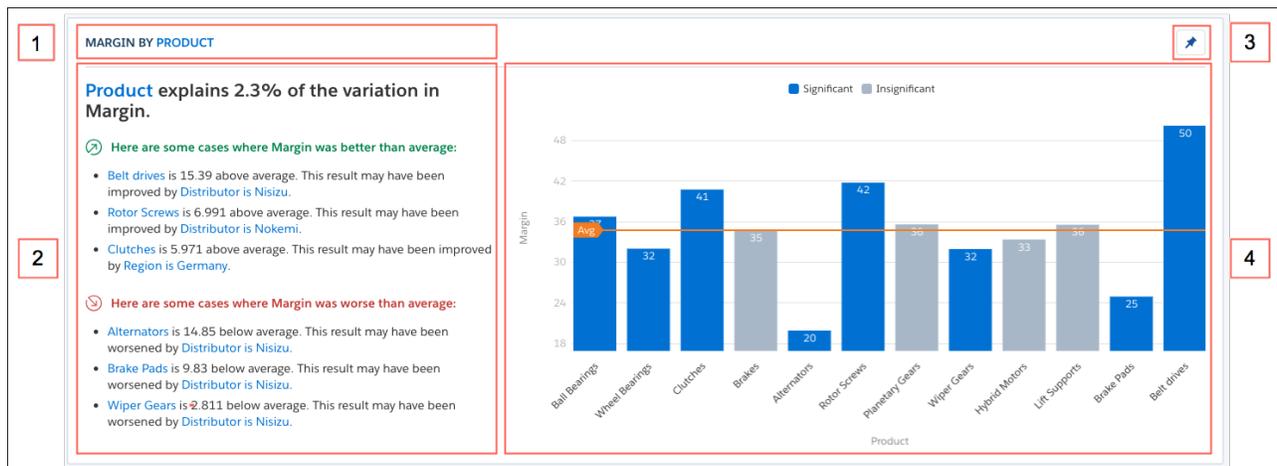
2. Click a story you want to open. Einstein Discovery displays the story in the Analytics UI.

The story navigation interface has three distinct areas:



- 1. Story Toolbar** - Display pinned insights, configure or save story settings, deploy a model to Salesforce, and view model metrics.
- 2. Insight Navigation bar** - Quickly switch views for insight categories—what happened, why it happened, predictions and improvements, and variable comparisons (what is the difference).
- 3. Insights list** - Scroll through and examine any insights that intrigue you. Interact with insights and visualize your data in new ways.

Each insight in the Insights list has four distinct areas:



- 1. Insight Category** - Two variables compared in the chart. Expressed as *Outcome Variable* by *Explanatory Variable* with *Filter* (if Filter is applicable).
- 2. Insight Description** - Text summary plus supporting details that explain the key points in each graph. The orange line shows the average outcome. To drill down into details, click a hyperlink in the insight description.

- Pin icon** - Pin any insight that interests you so that you can come back to it easily. To display only pinned insights in the Insights list, click the Pin filter on the Story toolbar.
- Chart** - Chart that illustrates the insight. To drill down into details, hover over a bar in the chart.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Manage Einstein Discovery Goals and Models Deployed to Salesforce

If you deploy models to Salesforce, you can now use the Model Manager to deployed models and the goals with which they are associated. Every Einstein Discovery story includes a desired goal to maximize or minimize the outcome. For example, a story goal can be to increase the margin (maximize) or decrease the per-unit cost (minimize). A *model* includes only the following parts of a story: explanations, predictions, and recommendations.

Where: This change applies to Einstein Analytics in Lightning Experience. Einstein Analytics and Einstein Discovery in Analytics are available for an extra cost in Enterprise, Performance, and Unlimited Editions. Also available in Developer Edition.

Who: To manage models deployed to Salesforce, you need the Manage Einstein Discovery user permission.

How: To manage models deployed to Salesforce:

- In Analytics Studio, on the story toolbar, click **Model Manager**.

In the Model Manager, each row represents a different goal that contains one or more models.

LABEL	NAME	PREDICTION ID	CREATED BY	CREATION DATE		
MySampleDataset_M...	MySampleDa_PORMO_...	OORRM000000002b4AA		2018-08-27T21:33:00...	View	Delete
MySampleDataset_M...	MySampleDa_EEqtr_35...	OORRM000000002q4AA		2018-08-30T18:41:51...	View	Delete
AcquiredAccount_Ow...	AcquiredAc_eTvh3_2872	OORRM00000000354AA		2018-09-04T04:21:53...	View	Delete

- To view the deployed models associated with a goal, click **View**.

REORDER	STORY NAME	FILTERS APPLIED	PUBLISHED	STATUS		
▲ ▼	MySampleDa_zKsJj		2018-08-27T21:33:00.000Z	Active	Deactivate	Delete
▲ ▼	AcquiredAc_jmdSf		2018-09-05T17:46:23.000Z	Active	Deactivate	Delete

- From this screen you can:

- reorder or change the sequence in which the Salesforce object evaluates a model
- deactivate a model, which hides it from Salesforce

- delete a model entirely

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Improve Your Einstein Discovery Models by Investigating Their Metrics and Performance

Model metrics help you understand your models' statistical basis and performance so that you can know where and how to enhance it for even better results.

Where: This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics and Einstein Discovery in Analytics are available for an extra cost in Enterprise, Performance, and Unlimited Editions. Also available in Developer Edition.

Who: To review model metrics, you need the Manage Einstein Discovery user permission.

How: To learn more about how your model performs:

1. In Analytics Studio, open a story.
2. On the Story toolbar, click **Model Metrics**.
3. Click the tab for the metrics you want to view: Coefficients, Cross-Validation Metrics, Scoring Metrics, and Cumulative Capture Rate Chart.

Model Metrics						
CUMULATIVE CAPTURE RATE CHART		SCORING METRICS		CROSS VALIDATION METRICS		COEFFICIENTS
0.657 PERFORMANCE (GINI) ⓘ		0.7394 MAX ACCURACY ⓘ		0.5023 THRESHOLD ⓘ		
Cross (k-fold) Validation sets aside a holdout sample of the data to test the performance of the prediction model, the metrics below show the performance of the model terms over multiple test and training runs.						
METRIC NAME	MEAN	STANDARD DEVIATION	MODEL #1	MODEL #2	MODEL #3	MODEL #4
MSE	0.1681	0.0013	0.1673	0.1699	0.1687	0.1665
RMSE	0.41	0.0016	0.409	0.4122	0.4107	0.408
Number Of Observations	7500	15.7956	7507	7518	7500	7475
R Squared	0.3198	0.0058	0.3212	0.3113	0.3192	0.3275
Log Loss	0.4916	0.0038	0.4889	0.4966	0.494	0.4872
AUC	0.827	0.0027	0.8287	0.8232	0.8259	0.8301
Gini Index	0.654	0.0053	0.6575	0.6464	0.6518	0.6602
Mean Per Class Error	0.2996	0.0072	0.2963	0.2895	0.3081	0.3045
Residual Deviance	7374.752	69.3	7340.037	7466.1531	7409.8282	7282.9897
Null Deviance	10310.6504	16.7623	10298.9933	10323.5681	10330.2729	10289.7674

The Scoring Metrics and Cumulative Capture Rate Chart tabs appear only when the selected outcome variable is text with two values. For example, an **org_type** field qualifies if it has only two values: "public" and "private". The Scoring Metrics and Cumulative Capture Rate Chart tabs do not appear for numeric outcome variables.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Communities: Threaded Discussions, Recognition Badges, Flow for Guest Users, Help Center Template, and More

Communities elves have been hard at work this release, bringing amazing features and improvements. Your community members can finally have actual conversations using threaded discussions. Recognition badges help motivate community members and drive adoption. Guest community users can use flows to do a host of things in a community without logging in. And your customer support can help customers help themselves by quickly setting up a knowledge base community using the new Help Center template. All this and a host of new components, security features, and general improvements to keep your community implementations buzz-worthy.



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: Content Management, Help Center Template, Flows for Guest Users, and Filtered Search Results](#)

Lightning communities are innovating at an amazing pace, and this release is no different. Create and manage content right from communities in Content Management. Use the Help Center template to let your customers quickly find the answers they need in your knowledge base. And export themes, just like you would with whole sites and pages.

[Lightning Components in Community Builder: Filtered Search, Topics on Records, Guest User Access to Flows](#)

Enjoy new Lightning components for use in communities, as well as enhancements to already existing ones. Filter search results, use threaded discussions, let users add topics to records, and give community guest users access to flows.

[Community Engagement: Recognition Badges and Reporting on Questions](#)

Recognition badges are generally available this release, helping your community members stay engaged and motivated. And now you can access reports on which questions in your community have been answered or not.

[Files in Lightning Communities: Folder Sharing, Editable File Detail Pages, and Custom Fields on File Uploads](#)

Now you can share multiple files easily with partners, prospects, or teammates. Fine-tune the file data in your libraries by editing fields on file detail pages and populating custom fields during file uploads.

[Partner Central: Delegated Account Management, Partner Co-Branding, Unique Partner Usernames, Relaxing Validation for Budgets, and Community User Visibility](#)

Account Management enhancements give delegated admins for Partner accounts the power to create and edit members of their sales teams. Channel partners can manage, create, and share brand logos and company information. Channel partners can use co-branded email templates in deal-related emails or marketing campaigns. Partners can have more flexibility around how budgets are allocated, requested, and claimed when using Market Development Funds.

[Sharing: Sharing Set Support for More Licenses and More Objects, Clickjack Protection for iframes](#)

Use sharing sets with all Customer and Partner Community licenses and with more objects. Use Google's IP Anonymization to help with privacy concerns. Protect your community from clickjack attacks.

[Usability and Performance Enhancements: Improved Dependent Picklist Controls and Support for Optional URL Query Parameters](#)

Improve your guest users' experience when on record pages, and enjoy a faster page response with support for optional URL query parameters.

[Communities Documentation: Enjoy a Flurry of Fresh Winter Content](#)

We refreshed our content offerings with several new pieces that explain the nuances of sharing CRM data securely in Communities. We also cleaned out some stale material and consolidated our content to make it searchable from Salesforce Help.

[Other Changes in Communities](#)

Learn about smaller changes that improve your experience with communities.

Lightning Communities: Content Management, Help Center Template, Flows for Guest Users, and Filtered Search Results

Lightning communities are innovating at an amazing pace, and this release is no different. Create and manage content right from communities in Content Management. Use the Help Center template to let your customers quickly find the answers they need in your knowledge base. And export themes, just like you would with whole sites and pages.

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.

[Create a Self-Service Help Center and Turn Customers into Search Heroes](#)

Create a public help center, and make it easy for everyone to discover your knowledge resources and find solutions for themselves. Instead of filing cases through customer service, customers can find what they need from the articles you make available from your knowledge base.

[Discover CMS for Community Cloud \(Beta\)](#)

Create and manage content right in your community with CMS for Community Cloud, accessed through the new Content Management tile in Community Workspaces. Organize your content or even snag information from your Salesforce CRM and add it to your communities with just a few clicks. With a few more clicks, adjust the layout to meet your needs.

[Koa and Kokua Go Off into the Sunset](#)

Are you still working with the Koa and Kokua templates? Then there are some things you need to know. As much as we love them, we're focusing only on developing the much richer, newer templates. We're still supporting the templates, but you can't create new communities with them. Consider updating to the latest templates and all the power they offer. Koa and Kokua are great, but you're missing out if you stick with them forever.

[Use Audience Targeting Enhancements](#)

Take advantage of Audience enhancements to better define your target members. We added the option to choose OR instead of AND (one OR two instead of one AND two). We also added operators this release like equals, not equals, contains, and does not contain.

[Export Themes, Just like Whole Sites and Pages](#)

Have a theme you've created and want to share it, but not the rest of your site? We've got you covered. From the **Developer** page in **Settings**, you can export a bare theme, without any other site structure, so you can share it around via file or AppExchange.

[Do More with Themes and Added Options](#)

We added two themes: Ember includes a stacked header; and Webster provides a search-first approach. We also added options to improve use and make working with themes easier.

[Edit Most Page URLs](#)

Community page addresses, other than Home, Login, and Error, can now be changed to accommodate your administrative and experience needs.

[Validate Head Markup as You Type](#)

If you're one of those more advanced folks using Community Builder to edit your head markup, we're keeping a closer watch on your syntax as you type. Get immediate feedback if particular tags aren't allowed or if you've entered incomplete or malformed meta tags before you try to save.

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 or Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: If you created your community in Summer '18, no need to do anything. Your community is updated automatically with the Winter '19 release. If you created your community in Spring '18 or earlier, you see an update flag  in Community Builder.

Important: Before updating your community, 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. Also, 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.

Create a Self-Service Help Center and Turn Customers into Search Heroes

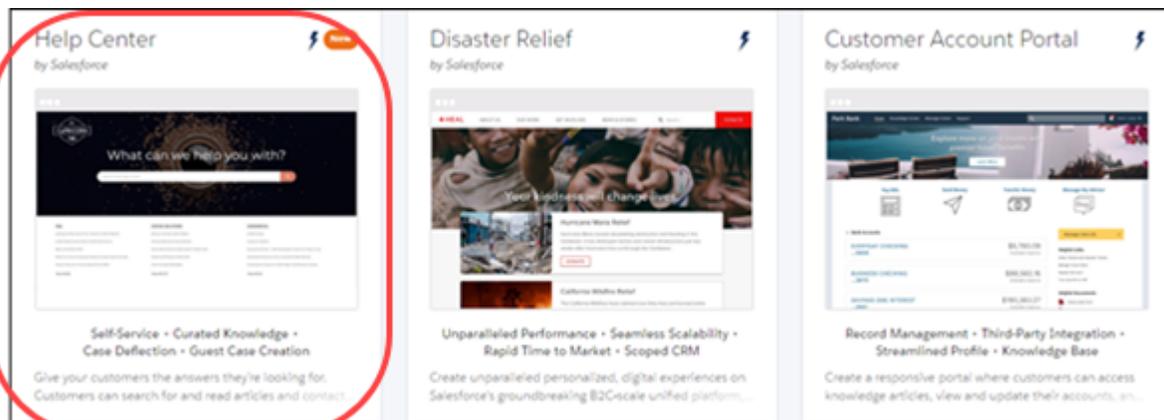
Create a public help center, and make it easy for everyone to discover your knowledge resources and find solutions for themselves. Instead of filing cases through customer service, customers can find what they need from the articles you make available from your knowledge base.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Developer, and Unlimited editions.

Why: Take the Knowledge articles that your support team already uses for solving customer problems, and share them directly with everyone. With your help center's public access, customers don't have to log in to find solutions. On the Home page, customers can jump right to featured topics or enter a search term. On the Customer Support page, customers can file a case or get on-the-spot access to articles related to their issue.

It's easier than ever to build, deploy, and upgrade a public-facing help center. A new Help Center template lets you create your help center in minutes. A new guided setup steps you through help center configuration. Follow the guided setup from start to finish, or walk away and pick up where you left off.

How: To start, Knowledge must be enabled for your org, and you must enable the Knowledge org preference. It's also useful to have a robust collection of Knowledge articles with a focus on solutions to common problems. When everything's in place, go to **Setup > Communities > All Communities**. Click **New Community**, then click the **Help Center** template.



After you create your help center, launch the guided setup in Workspaces by clicking the **Guided Setup** tile, and then clicking the **Help Center** guided setup tile.

 **Note:** Your default view of the help center includes a new footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

Also of note: Way back in Summer '18, we boosted the limits on articles and translation languages for some editions. It's useful to know for your help center planning.

- Essentials: 500 Articles, 1 Language
- Enterprise: 50 K Articles, 5 Languages
- Unlimited 150 K Articles, 10 Languages

Discover CMS for Community Cloud (Beta)

Create and manage content right in your community with CMS for Community Cloud, accessed through the new Content Management tile in Community Workspaces. Organize your content or even snag information from your Salesforce CRM and add it to your communities with just a few clicks. With a few more clicks, adjust the layout to meet your needs.

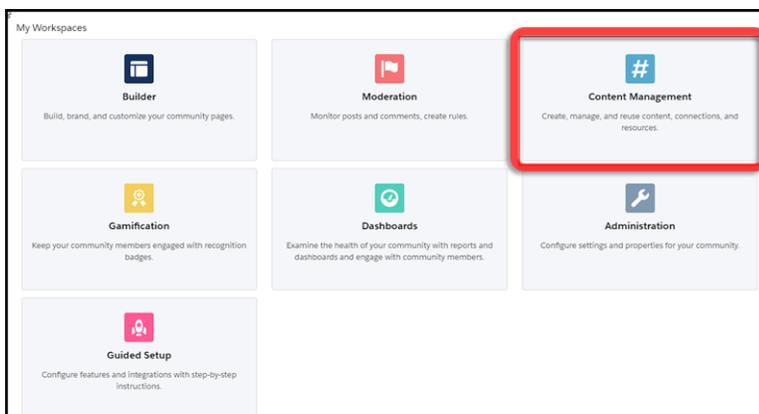
Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions. This open beta is available to all communities automatically, but your admin has to enable Content Management in Community Workspaces to get the fun flowing.

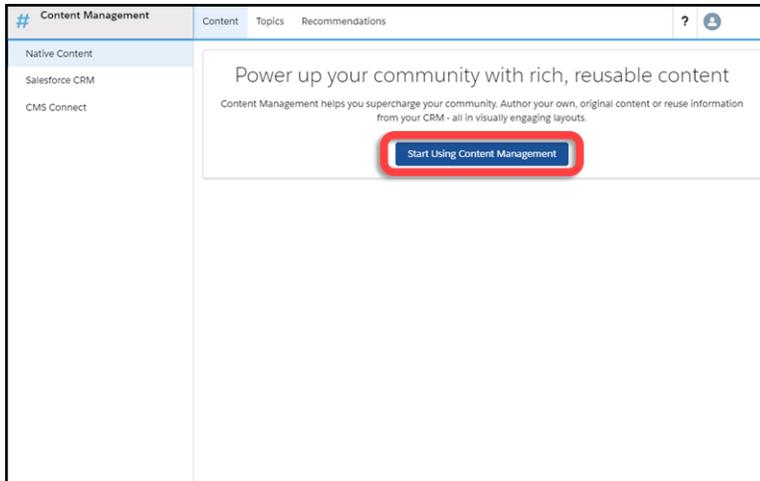
 **Note:** This release contains a beta version of CMS for Community Cloud which means it's a high-quality feature with known limitations. CMS for Community Cloud isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. 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 CMS for Community Cloud in the [Community Cloud group](#) in the Trailblazer Community.

Who: CMS for Community Cloud is available to anyone with permissions to use Community Workspaces to create content and to anyone with access to Community Builder to add content to a page.

Why: Now you can integrate blogs from your marketing or technical staff. Even more exciting, now you can also display your Salesforce CRM data like inventory or account information easily. Each piece of material has a single source of truth so you can manage it all in one place. In other words, update it in one place, and it's automatically updated everywhere it is used.

How: Turn on CMS for Community Cloud in Community Workspaces by clicking the **Content Management** tile and then selecting **Start Using Content Management**.





SEE ALSO:

[Salesforce Help: Content Management Overview \(can be outdated or unavailable during release preview\)](#)

Koa and Kokua Go Off into the Sunset

Are you still working with the Koa and Kokua templates? Then there are some things you need to know. As much as we love them, we're focusing only on developing the much richer, newer templates. We're still supporting the templates, but you can't create new communities with them. Consider updating to the latest templates and all the power they offer. Koa and Kokua are great, but you're missing out if you stick with them forever.

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: Here's the current state of the Koa and Kokua templates.

- You can't create a new community with Koa and Kokua with the Community wizard.
- You can't change from another template to Koa or Kokua using the Change Template wizard.
- You can change from a Koa or Kokua template to another template.
- Salesforce Customer Support can still manually create Koa or Kokua communities for customers still using them, if necessary.

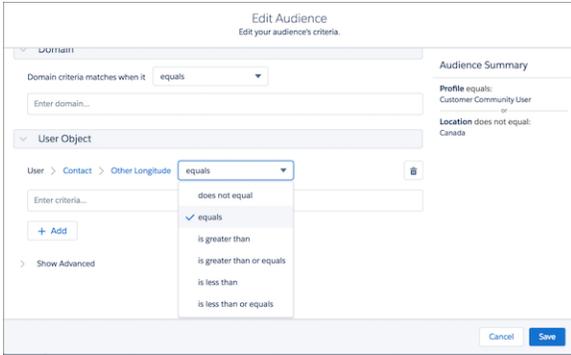
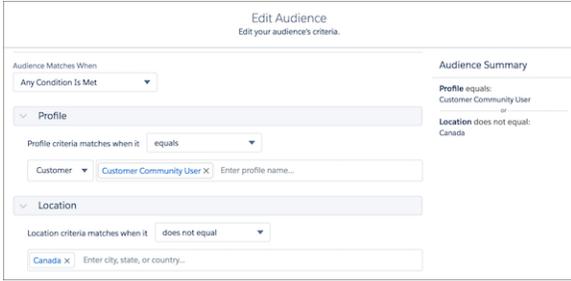
SEE ALSO:

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

Use Audience Targeting Enhancements

Take advantage of Audience enhancements to better define your target members. We added the option to choose OR instead of AND (one OR two instead of one AND two). We also added operators this release like equals, not equals, contains, and does not contain.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.



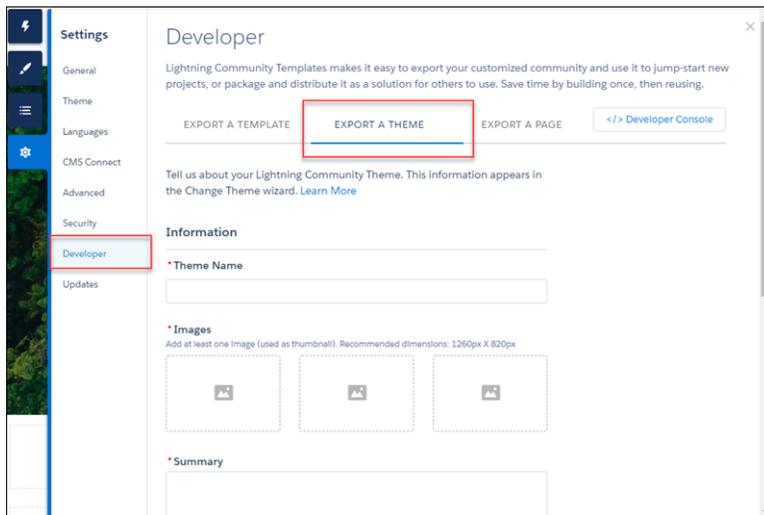
Export Themes, Just like Whole Sites and Pages

Have a theme you've created and want to share it, but not the rest of your site? We've got you covered. From the **Developer** page in **Settings**, you can export a bare theme, without any other site structure, so you can share it around via file or AppExchange.

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 all Communities admins.

How: Exporting a theme is similar to exporting a page or template, and it even lives in the same place to make it easy to find.



Do More with Themes and Added Options

We added two themes: Ember includes a stacked header; and Webster provides a search-first approach. We also added options to improve use and make working with themes easier.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: We're always working to make Communities better and more flexible for you. That means we're also making lots of little tweaks alongside some of the bigger ones. Here's a list of some small stuff with significant impact in this release.

- Do more with themes. The new color property in your header background improves menu visibility during scrolling when **Pin to Header** and **Hero Under Nav** are enabled.
- The new compact header type lets you position your logo left, right, or center. It also includes slide-out navigation, and you can place navigation on the right or left side.
- You can show all components regardless of page type.
- The Change Themes wizard is always ordered newest to oldest.

 **Note:** If you're looking for the Customer Service theme, it now appears at the end of the list.

- You can now create pages and routes in a community from standard pages that weren't installed at template creation time.
- The trash can icon has been changed to the more universal red X to indicate delete functions in several dialogs for more consistency.

SEE ALSO:

[Salesforce Help: Understanding Themes](#)

Edit Most Page URLs

Community page addresses, other than Home, Login, and Error, can now be changed to accommodate your administrative and experience needs.

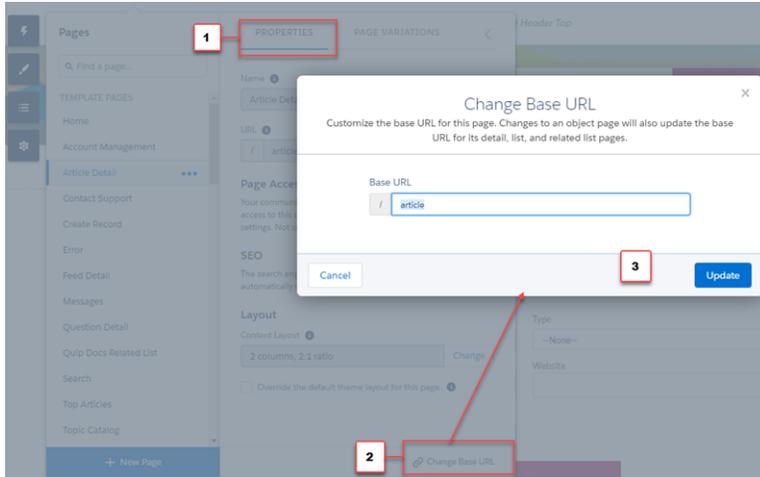
Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: Changing the URL for most standard pages is simple as 1, 2, 3...4.

1. Open the (1) Page **Properties** for the page you want to update.
2. Click (2) **Change Base URL** and enter a new base URL for your page.
3. Click (3) **Update** and you're almost done.

 **Note:** Updating the base URL for an object page will automatically update its detail, list, and related list pages.

4. And now that final step: Remember to update all other references to your pages (object, detail, list, or related list) that you may have hand-coded from other pages or from links outside your community as these won't be automatically updated.

**SEE ALSO:**

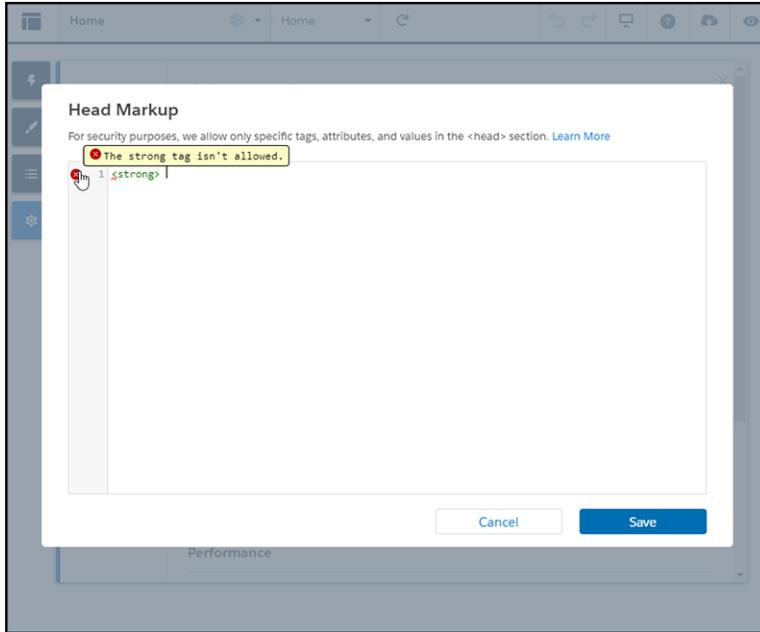
[Salesforce Help: Create Custom Pages with Community Builder](#) (can be outdated or unavailable during release preview)

Validate Head Markup as You Type

If you're one of those more advanced folks using Community Builder to edit your head markup, we're keeping a closer watch on your syntax as you type. Get immediate feedback if particular tags aren't allowed or if you've entered incomplete or malformed meta tags before you try to save.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: Just type away as you normally would. We'll do the rest.

**SEE ALSO:**

[Salesforce Help: Add Markup to the Page <head> to Customize Your Community](#)(can be outdated or unavailable during release preview)

Lightning Components in Community Builder: Filtered Search, Topics on Records, Guest User Access to Flows

Enjoy new Lightning components for use in communities, as well as enhancements to already existing ones. Filter search results, use threaded discussions, let users add topics to records, and give community guest users access to flows.

IN THIS SECTION:

[Filter Search Results in Communities](#)

Give your community and portal users the opportunity to refine their searches. Users in a community can now filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks.

[Enjoy the Give and Take of Discussions in Your Feed](#)

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. Now you can experience this lively flow in your communities with threaded discussions.

[Allow Guest Users to Access Flows](#)

Guest users can now access flows through your public community pages. With flows, you can guide your users through the registration process while learning more about them, allowing you to provide the best community experience possible.

[Block Deletion of Threads in Communities](#)

To prevent loss of important content, orgs created after Winter '19 block the deletion of any feed item that has something nested under it. For example, when a question has an answer or a comment has a reply, deletion of the question or comment is blocked.

[Use Rich Publisher Apps on Your Mobile Devices](#)

When you visit a community feed on a mobile device, you can now use any Rich Publisher Apps that are available in the feed publisher.

[Let Users Add Topics to Records](#)

Let your community members assign topics to records to organize them by common themes. Your community members can use topics to track what they're seeing in the field and discussing with their customers.

[Do More with Topics from the List View](#)

View your community's topics in one place, and sort them by name, description, or type. Quickly see whether your topic is featured, navigational, content, or any combination of types. Click a topic name to go to the topic detail page in your community.

[Add Topics to Your Original Content \(Beta\)](#)

Enable topics for content, and use them to organize your community's native content by theme.

[Display Related Lists with More Precision](#)

Add the new Related List - Single component to an object page to specify which related list to display. Rather than use the Related Records List component, which displays all related lists of all kinds, the new components provides a more targeted experience. For instance, you can show just the related open cases for a particular account. In addition, both components have a new layout option for narrower displays, such as sidebars and mobile, for better usability.

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

Add the new Suggested Actions component to run a strategy that determines which propositions to display to your Lightning community members. Propositions, or suggestions, can serve any purpose, such as providing a common action or a special offer. When creating a strategy, you can determine the conditions for displaying a given proposition. This component is available as part of the Einstein Next Best Action pilot.

[Show Salesforce IoT Data to Community Users](#)

Add the Salesforce IoT Insights Community Builder component to show Salesforce IoT data to your Lightning community members. This component is available only in English.

[Customize Actions on the User Profile Component](#)

Action buttons on the User Profile component are now customizable. The Edit, Follow, Freeze, Message, and Give Badge actions are now optional, so you can keep them all in a discreet dropdown or choose to show only certain actions on your profiles.

[Use More Snap-Ins Chat Features in Your Community](#)

You don't have to choose between the benefits of including chat in your communities and powerful chat features. Take your snippet-only settings to your communities' snap-ins in the Snap-ins Chat component. Add features like extra pre-chat and direct-to-button routing. Automated invitations are still unavailable for Community snap-ins. The snippet settings in the resource file are a little different than the settings you use in the code snippet. Refer to the Snap-Ins for Web Developer Guide for details.

[Allow Field Service Dispatching from Lightning Communities](#)

Embed the Field Service Lightning dispatcher console in your Lightning community and give your contractors the ability to manage dispatching for their team. A new permission set in the Field Service Lightning managed package lets you hand over the dispatching reins to trusted contractor managers.

[Save Time with New Global Actions for Communities](#)

We've added two new case global actions, each designed for a specific user type. When you configure your Contact Support Form component, you now see separate case global actions: one for authenticated users and one for guest users.

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

View and update all dependent and controlling fields when editing a picklist or checkbox on a Record Details page.

[Update Subtopic Elements on Headline Component in Your Community](#)

If you're using the Headline component in your community and showing subtopics on your topic detail page, you may need to update a few selectors. Still planning to continue using custom CSS overrides? Then migrate them after you update the template.

[Search and Share List Views and Filter Campaign Related Lists](#)

The Record List component is now easier to use with search list view, filter campaign related lists, and the ability to share a list view with other people in your org.

Filter Search Results in Communities

Give your community and portal users the opportunity to refine their searches. Users in a community can now filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

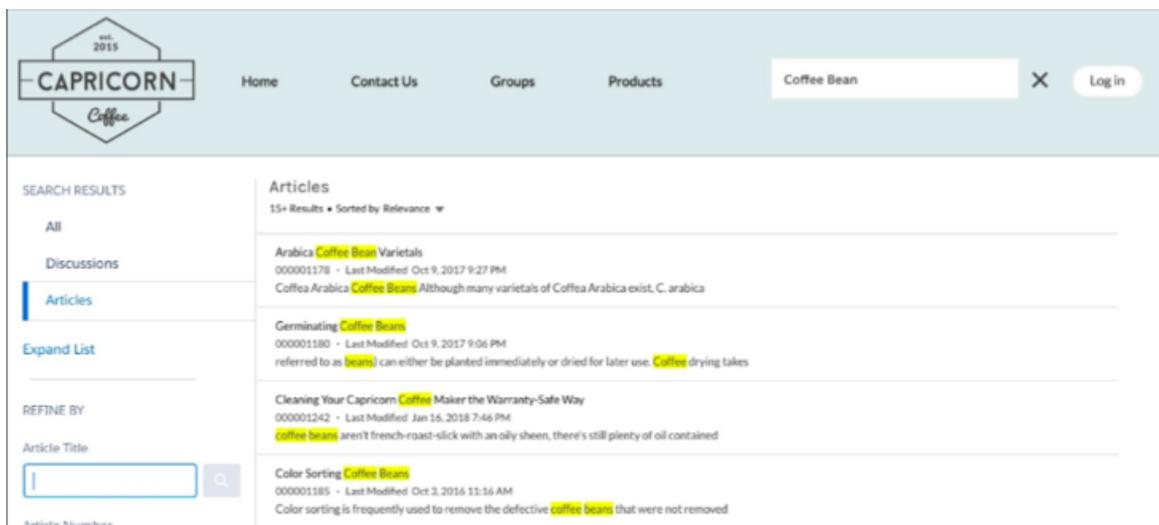
 **Note:** Filtering on knowledge articles is a beta feature. As a beta feature, filtering on knowledge articles is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the 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.

How: Search filtering for communities is on by default in your Salesforce org. From Setup, in the Object Manager, go to Search Layouts for each object you want to filter. 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.

Once you've set up search filtering on an object-by-object basis, you can enable it on a community-by-community basis. Select the Allow search result filtering checkbox in a community's Global Search Results component properties.

Then, your community members can narrow search results by selecting a supported object on the left side of the search results page and then applying filters.

 **Note:** You can't have different search filtering criteria for your internal org and external communities. Whichever fields you choose for filtering in your internal org also show up in your communities if external users have access to those fields.



SEE ALSO:

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

Enjoy the Give and Take of Discussions in Your Feed

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. Now you can experience this lively flow in your communities with threaded discussions.

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: A thread is any feed item that has one or more levels nested under it. For example, a question with an answer or a comment with a reply is a thread. A threaded discussion can have up to three levels of replies. Discussions are indented to make it clear who's responding to what.

The screenshot shows a threaded discussion in Salesforce Community Builder. At the top, a user named Brete Belson asks a question: "Where will we meet for the next group all-hands?". Below the question is a "TEST" button and interaction options: "Upvote", "Answer", and "Share". There are 4 answers shown. The first answer is from Lin Chu, stating "Fourth-floor, room 217. Bring your laptop!". Brete Belson replies, "Thanks! Why laptop?". Lin Chu replies, "You're the designated secretary for this session.". Brete Belson replies, "Ah! Should have checked the calendar. Thanks again.". At the bottom, there is a text input field for a reply, a rich text editor toolbar with icons for bold, italic, underline, link, unlink, list, and image, and a "Reply" button.

We also updated notification emails for threaded discussions. When you click a link in an email to a thread, it takes you directly to the answer or reply. In the olden days, a notification link took you to the top of the thread.

How: For new communities, threaded discussions are available by default. For existing communities, go to your community's Administration Workspace. Under the General heading in Preferences, select **All discussion threads** and click **Save**.

Important: To prevent loss of important content, orgs created after Winter '19 block the deletion of any feed item that has something nested under it. For example, when a question has an answer, deletion of the question is blocked.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads.

We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

If nothing is nested under a feed item, the author can always delete the item.

[Chatter REST API](#) and [Chatter in Apex](#) support threaded discussions.

Allow Guest Users to Access Flows

Guest users can now access flows through your public community pages. With flows, you can guide your users through the registration process while learning more about them, allowing you to provide the best community experience possible.

Where: This feature is available in Salesforce Tabs + Visualforce and Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Allowing guest users to access flows means you can serve up multi-part forms and decision trees aimed at gathering specific data before a user registers. Admins can register users at the end of the flow and pull in all previously entered information.

Example: Guest user flows allow users to provide their preferences before creating an account. In this example, the admin wants to let users declare their data privacy preferences before creating an account. Using flows, the admin creates a screen to gather login information, such as name and email address.

The image shows a screenshot of a 'User Registration' form. The form is titled 'User Registration' and contains four input fields, each with a red asterisk indicating it is required. The fields are: 'Email' with the value 'example@example.com', 'First name' with the value 'Hailey', 'Last name' with the value 'Sato', and 'Password' with a masked value of ten dots. At the bottom right of the form is a black button with the text 'Next' in white.

When visitors enter basic information, they can move to the next screen, which asks about data collection preferences.

User Registration

Accept all cookies

Accept only first party cookies

Reject all cookies

Previous **Next**

The visitor can continue to the last screen, which creates a user record and saves their preferences.

User Registration

Success! Your account has been created.

Login Previous **Finish**

Block Deletion of Threads in Communities

To prevent loss of important content, orgs created after Winter '19 block the deletion of any feed item that has something nested under it. For example, when a question has an answer or a comment has a reply, deletion of the question or comment is blocked.

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: For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to get blocking enabled. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete community threads. The author can always delete a feed item that has nothing nested under it.

Why: We recommend blocking deletions because, when deletion is **not** blocked:

- A user who creates a feed item can delete **any** response nested under it.
- A user who deletes a feed item also deletes **all** responses nested under it.

Use Rich Publisher Apps on Your Mobile Devices

When you visit a community feed on a mobile device, you can now use any Rich Publisher Apps that are available in the feed publisher.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic from mobile devices. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Find the Rich Publisher Apps icons next to the Attach icon in the feed publisher.

Cancel Post Ask

Post to a navigational topic ▾ Required

*Question

What would you like to know?

Details

B I U ~~ABC~~ I_x ☰ ☑

📎 </> 👤

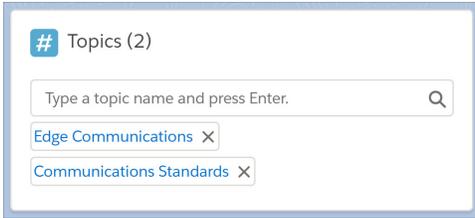
📎 Add Video 📅 Calendar Invite 📄 Add Gif

Let Users Add Topics to Records

Let your community members assign topics to records to organize them by common themes. Your community members can use topics to track what they're seeing in the field and discussing with their customers.

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: 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 also assign the topic to cases, contacts, or any other record that they want to organize under the communications standards theme. Community members can easily view, add, and remove topics from records.



How: Add the Topics component to record detail pages for objects that have topics enabled. Configure the title, the placeholder text that appears in the topic editor, and the number of topics listed before the Show More link appears.

SEE ALSO:

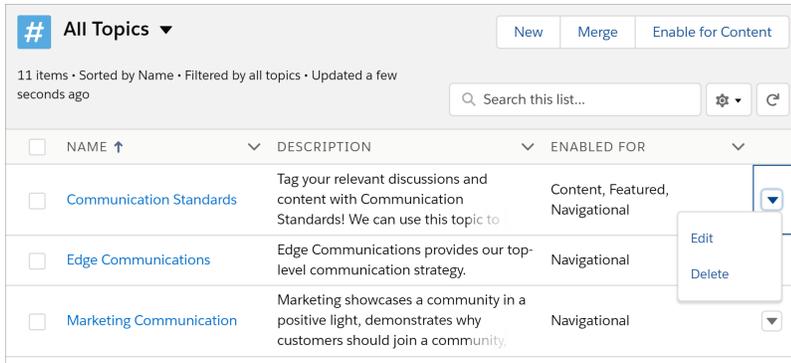
[Salesforce Help: Configure Topics for Records in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

Do More with Topics from the List View

View your community's topics in one place, and sort them by name, description, or type. Quickly see whether your topic is featured, navigational, content, or any combination of types. Click a topic name to go to the topic detail page in your community.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: Enable up to 10 topics for content at one time by selecting the topics and clicking **Enable for Content**. Easily edit and delete topics from the list.



How: To see the new topics list view, from Workspaces, click **Content Management > Topics**.

If you're using Content Management (beta), you can filter the list view to your content topics by selecting **All Topics > All Content Topics**.

Note: This release contains a beta version of CMS for Community Cloud which means it's a high-quality feature with known limitations. CMS for Community Cloud 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 CMS for Community Cloud in the [Community Cloud group](#) in the Trailblazer Community.

SEE ALSO:

[Add Topics to Your Original Content \(Beta\)](#)

Add Topics to Your Original Content (Beta)

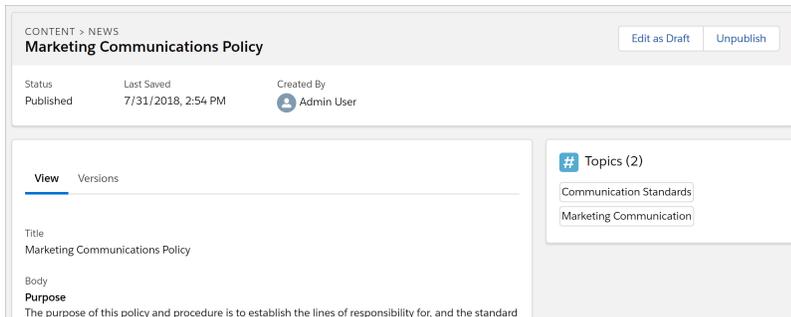
Enable topics for content, and use them to organize your community's native content by theme.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Note: This release contains a beta version of CMS for Community Cloud which means it's a high-quality feature with known limitations. CMS for Community Cloud 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 CMS for Community Cloud in the [Community Cloud group](#) in the Trailblazer Community.

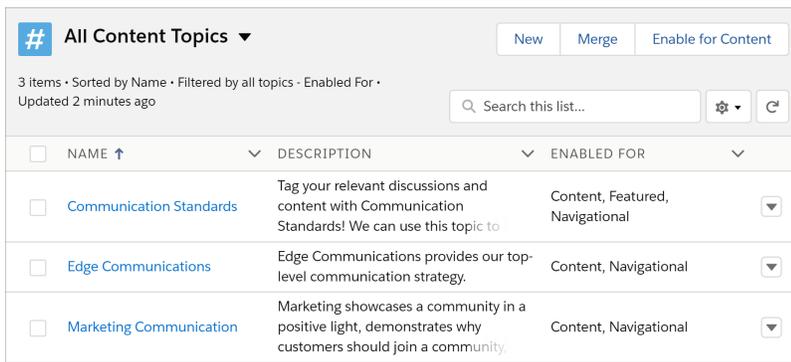
How: To enable topics for content, from Workspaces, click **Content Management > Topics**. Select up to 10 topics, and click **Enable for Content**. Alternatively, click **New**, enter a topic name and description, and select **Enable for content**.

After you enable topics for content, you can associate them with your original content. You can't create topics with the Topics component on your content page.



You can merge content topics with other topics. When you do, the content associations are preserved.

To see your content topics in one place, select **All Topics > All Content Topics**.



[Chatter REST API](#) and [Chatter in Apex](#) support content topics.

SEE ALSO:

[Discover CMS for Community Cloud \(Beta\)](#)

Display Related Lists with More Precision

Add the new Related List - Single component to an object page to specify which related list to display. Rather than use the Related Records List component, which displays all related lists of all kinds, the new components provides a more targeted experience. For instance, you can show just the related open cases for a particular account. In addition, both components have a new layout option for narrower displays, such as sidebars and mobile, for better usability.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Which Components Can I Use with Each Template?](#)

[Salesforce Help: Related List - Single Component \(can be outdated or unavailable during release preview\)](#)

Suggest Actions and Offers to Community Members (Pilot)

Add the new Suggested Actions component to run a strategy that determines which propositions to display to your Lightning community members. Propositions, or suggestions, can serve any purpose, such as providing a common action or a special offer. When creating a strategy, you can determine the 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 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 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 accepts a suggested offer, 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.

Why: Let's say a customer creates a case with support and then clicks a link to track its progress. If the description includes "credit card benefits," your community displays two recommended flows: one that offers a new card with travel rewards, and one that offers lower interest rates and fees.

Suggested Actions



Earn Travel Rewards with qualifying purchase in 120 days. No annual fee for 12 months.

[Travel Rewards](#)

[No Thanks](#)



Low Intro APR for 18 months on balance transfers and purchases, and no late fees.

[Low Intro APR](#)

[No Thanks](#)

[Chatter REST API](#) and [Chatter in Apex](#) support Einstein Next Best Action.

Show Salesforce IoT Data to Community Users

Add the Salesforce IoT Insights Community Builder component to show Salesforce IoT data to your Lightning community members. This component is available only in English.

Where: This feature is available in Lightning communities accessed through Lightning Experience, and is available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights](#)

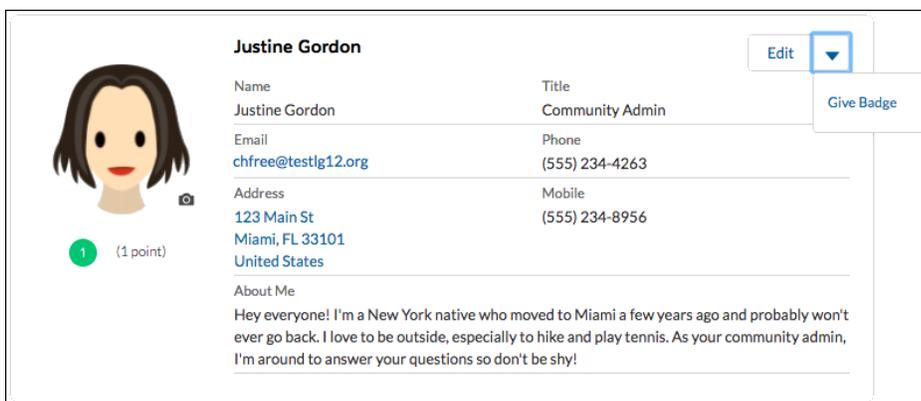
Customize Actions on the User Profile Component

Action buttons on the User Profile component are now customizable. The Edit, Follow, Freeze, Message, and Give Badge actions are now optional, so you can keep them all in a discreet dropdown or choose to show only certain actions on your profiles.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Who: Only users with the **Give Recognition Badges in Lightning Communities** permission can see the Give Badge action.

Why: To give you more flexibility and space, we added all the actions to one dropdown menu.



The buttons appear in the order that they're added, and only the Follow action appears by default.

How: To modify the action buttons on your user profiles, go to **Setup > Object Manager > Users** and click **User Page Layouts**. On the **Mobile and Lightning Actions** tab, you can select which buttons to display and which ones to hide.

Use More Snap-Ins Chat Features in Your Community

You don't have to choose between the benefits of including chat in your communities and powerful chat features. Take your snippet-only settings to your communities' snap-ins in the Snap-ins Chat component. Add features like extra pre-chat and direct-to-button routing. Automated invitations are still unavailable for Community snap-ins. The snippet settings in the resource file are a little different than the settings you use in the code snippet. Refer to the Snap-Ins for Web Developer Guide for details.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Add Code Snippet Settings to Your Communities Snap-Ins](#)

Allow Field Service Dispatching from Lightning Communities

Embed the Field Service Lightning dispatcher console in your Lightning community and give your contractors the ability to manage dispatching for their team. A new permission set in the Field Service Lightning managed package lets you hand over the dispatching reins to trusted contractor managers.

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.

How: For details, see [Let Partners Dispatch from Communities](#).

Save Time with New Global Actions for Communities

We've added two new case global actions, each designed for a specific user type. When you configure your Contact Support Form component, you now see separate case global actions: one for authenticated users and one for guest users.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

See Field Dependencies While Editing a Record Details Page

View and update all dependent and controlling fields when editing a picklist or checkbox on a Record Details page.

Where: This feature is available in Lightning communities, accessed through Lightning Experience and Salesforce Classic, and is available in Enterprise, Performance, Unlimited, and Developer editions.

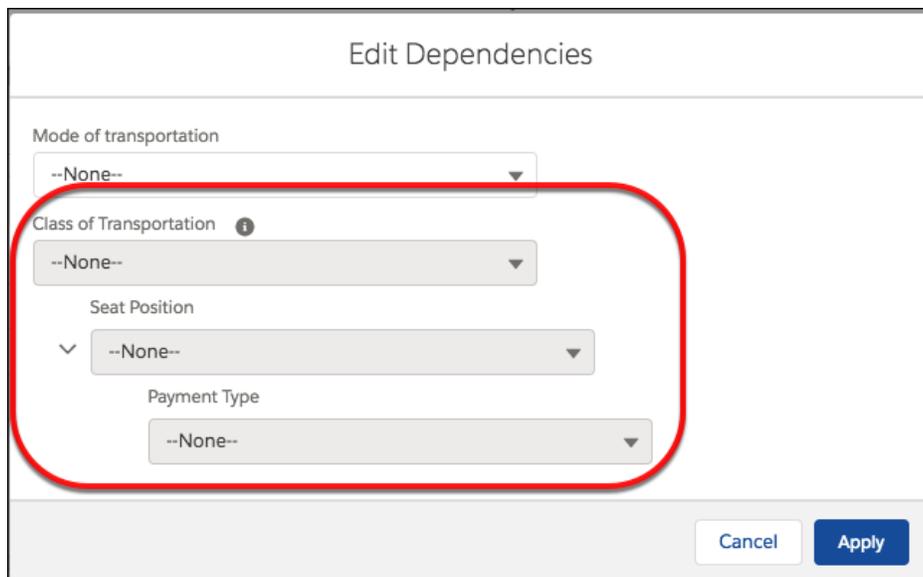
How: Use the link below a picklist or checkbox to display related fields. Update fields as needed, then click **Apply**, and click **Save**.



Mode of transportation

--None--

View all dependencies



Edit Dependencies

Mode of transportation

--None--

Class of Transportation ⓘ

--None--

Seat Position

--None--

Payment Type

--None--

Cancel Apply

Update Subtopic Elements on Headline Component in Your Community

If you're using the Headline component in your community and showing subtopics on your topic detail page, you may need to update a few selectors. Still planning to continue using custom CSS overrides? Then migrate them after you update the template.

Where: This change applies to the Headline component of Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available Enterprise, Performance, Unlimited, and Developer editions.

How: Update the following selectors.

Old Selectors	New Selector
<ul style="list-style-type: none"> <code>forceTopicSubTopicNavigation</code> <code>.forceTopicTopicLink</code> <code>.forceTopicSubTopicNavigation</code> <code>.forceTopicTopicLink .slds-wrap</code> <code>.forceTopicSubTopicNavigation</code> <code>.forceTopicTopicLink .slds-grid</code> 	<code>.forceTopicSubTopicNavigation .topicLink</code>

Search and Share List Views and Filter Campaign Related Lists

The Record List component is now easier to use with search list view, filter campaign related lists, and the ability to share a list view with other people in your org.

Where: This change is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Record List](#)

Community Engagement: Recognition Badges and Reporting on Questions

Recognition badges are generally available this release, helping your community members stay engaged and motivated. And now you can access reports on which questions in your community have been answered or not.

IN THIS SECTION:

[Keep Members Engaged with Recognition Badges \(Generally Available\)](#)

Get and keep your members engaged by giving them recognition badges. We start you off with four: Congratulations, Welcome, Nice Work, and Thanks. You can also create your own with images and messaging.

[Display Recognition Badges on User Profiles](#)

Recognition Badges are available on the User Profile component and as a standalone Recognition Badges component. The Recognition Badges card displays the last three badges earned by the user and a button to award new badges.

[Award Recognition Badges with the New Give Badge Button](#)

Giving your fellow users the recognition badges they deserve is easy with the Give Badge action. Add Give Badge as a button, and give any user a badge directly from a user profile.

[Use the Questions With and Without Answers Report to See Your Community in Action](#)

The Questions With and Without Answers report shows you the questions asked in your community and if they've been answered. You get insight into who's asking questions, how often they are answered, and who is answering them. Unlike the existing question reports, this one shows questions across all objects in the community and includes both answers and best answers.

Keep Members Engaged with Recognition Badges (Generally Available)

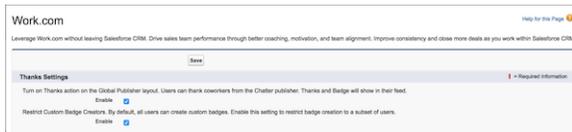
Get and keep your members engaged by giving them recognition badges. We start you off with four: Congratulations, Welcome, Nice Work, and Thanks. You can also create your own with images and messaging.

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.

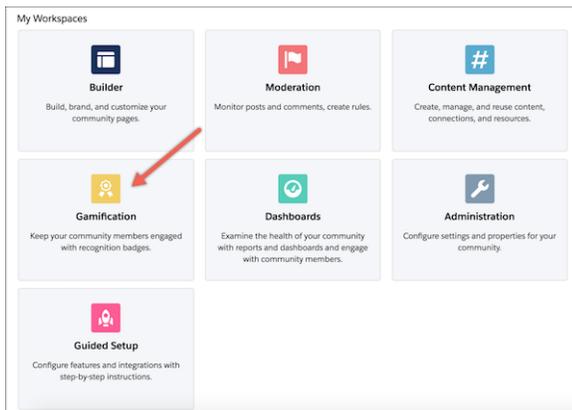
How: Enable Work.com's Thanks feature. In Classic, from Setup enter *work.com* in the Quick Find box, and then select **Work.com Settings**.



Select **Enable** and save. We recommend that you allow only community managers to create custom badges to keep control of the number of badges created and avoid duplicates. Use permission sets or edit user profiles to include permissions for creating and giving badges.



Then go to your Lightning Community's Workspaces, and click **Gamification**.



Turn on **Recognition Badges** and you're ready to go. From the main page, you can create badges and manage your existing ones.

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

To determine who can give a particular badge, select **Manage Badge Givers** from the listview row actions and add members.

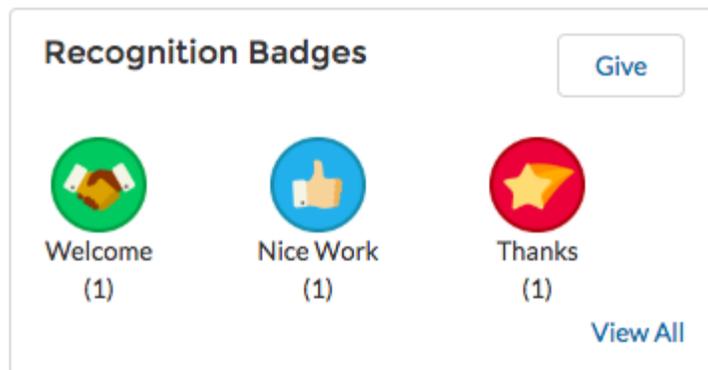
Note: The **Manage Badge Givers** option is not available for public badges. To change the status of a badge, edit the badge and deselect **Public**. You can now choose who can give the badge.

Display Recognition Badges on User Profiles

Recognition Badges are available on the User Profile component and as a standalone Recognition Badges component. The Recognition Badges card displays the last three badges earned by the user and a button to award new badges.

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: Include the Recognition Badges component on any user profile page to display the user's badges.



How: To start using the Recognition Badges component, click the **Gamification** tile in Community Workspaces. On the **Recognition Badges** tab, click **Enable**.

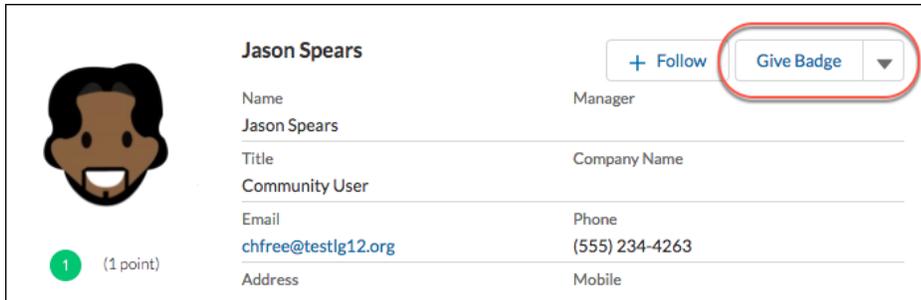
Award Recognition Badges with the New Give Badge Button

Giving your fellow users the recognition badges they deserve is easy with the Give Badge action. Add Give Badge as a button, and give any user a badge directly from a user 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.

Who: Only users with the **Give Recognition Badges in Lightning Communities** permission can see the Give Badge action.

Why: From a user profile, select Give Badge and that user's name is automatically included in the To field.



You can also give badges with the **Give** button on the Recognition Badges card. Add the card to your user profiles with the User Profile component or the Recognition Badges component.

How: To add the Give Badge action to your user profiles in the Classic interface, go to **Setup > Build > Customize > Users > Page Layouts**. Edit **User Layout**. Under **Mobile and Lightning Actions**, select **Give Badge** and add it to the display.

Use the Questions With and Without Answers Report to See Your Community in Action

The Questions With and Without Answers report shows you the questions asked in your community and if they've been answered. You get insight into who's asking questions, how often they are answered, and who is answering them. Unlike the existing question reports, this one shows questions across all objects in the community and includes both answers and best answers.

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.

When: This report is available in the Winter '19 Community Management Package on the AppExchange, available soon after the release.

Files in Lightning Communities: Folder Sharing, Editable File Detail Pages, and Custom Fields on File Uploads

Now you can share multiple files easily with partners, prospects, or teammates. Fine-tune the file data in your libraries by editing fields on file detail pages and populating custom fields during file uploads.

IN THIS SECTION:

[Ensure Access to Documents with Proper Permissions](#)

Ensure that your community users can access documents by verifying access to Documents in their profile. If users don't have Read access to Documents on their profile, they see an "Insufficient Privileges" error.

[Make Changes to File Fields When You Need To](#)

You can now edit file details in Communities for all fields, including file name, description, and custom fields, so you can keep your file information accurate and up to date.

[Populate Custom Fields When Uploading Files](#)

Users can populate required custom fields and see validation rule error messages when files are uploaded to the community.

[Share Folders Using Public Links](#)

Share multiple files easily by creating public links to folders.

[Ensure Access to Documents with Proper Permissions](#)

Ensure that your community users can access documents by verifying access to Documents in their profile. If users don't have Read access to Documents on their profile, they see an "Insufficient Privileges" error.

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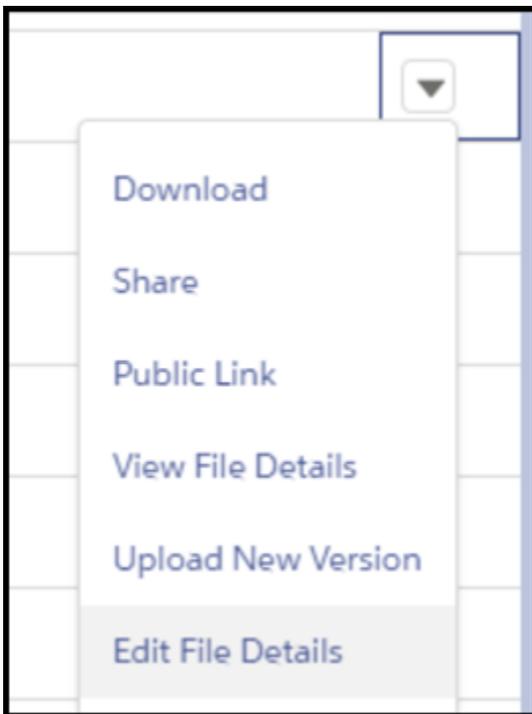
Where: This change applies to Salesforce Tabs + Visualforce communities, accessed through Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Modify user profiles to allow at least Read access to the Document object on the profile.

Make Changes to File Fields When You Need To

You can now edit file details in Communities for all fields, including file name, description, and custom fields, so you can keep your file information accurate and up to date.

Where: This feature is available in Lightning communities accessed through Lightning Experience, and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.



Populate Custom Fields When Uploading Files

Users can populate required custom fields and see validation rule error messages when files are uploaded to the community.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: This feature is available on files uploaded from Files home, from the Files or Notes and Attachments related lists, and the Lightning file upload component. File details can't be added to files uploaded from feed posts or comments.

When uploading a file, users are alerted to required fields or validation errors that must be fixed before the file can be saved.

Share Folders Using Public Links

Share multiple files easily by creating public links to folders.

Where: This feature is available in Lightning communities accessed through Lightning Experience, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Share Multiple Files in a Folder Using Public Links](#)

Ensure Access to Documents with Proper Permissions

Ensure that your community users can access documents by verifying access to Documents in their profile. If users don't have Read access to Documents on their profile, they see an "Insufficient Privileges" error.

Where: This change applies to Salesforce Tabs + Visualforce communities, accessed through Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Modify user profiles to allow at least Read access to the Document object on the profile.

Partner Central: Delegated Account Management, Partner Co-Branding, Unique Partner Usernames, Relaxing Validation for Budgets, and Community User Visibility

Account Management enhancements give delegated admins for Partner accounts the power to create and edit members of their sales teams. Channel partners can manage, create, and share brand logos and company information. Channel partners can use co-branded email templates in deal-related emails or marketing campaigns. Partners can have more flexibility around how budgets are allocated, requested, and claimed when using Market Development Funds.

IN THIS SECTION:

[Drive Data Sharing in a Multi-Tier Distribution Channel with Partner Relationships \(Pilot\)](#)

Use clicks, not code to quickly set up partner channels and manage the complex relationships between partners. With Partner Relationships, you can easily model multi-tiered distribution networks and share only select information between partners so they can work better together. For example, with Partner Relationships, distributors can see all of their resellers' opportunities and franchise owners can update the leads of their retail stores.

[Manage and Share Brand Information and Include It in Co-Branded Email Templates \(Generally Available\)](#)

Channel account managers can upload brand logos and company information. Admins and channel managers can include this information in co-branded email templates that partners can use in marketing campaigns, deal communications, and websites.

[Encourage External Delegated Admins to Manage Their Teams \(Generally Available\)](#)

Vendor admins no longer have to be the go-to for partner account managers when someone gets locked out of their account or adds a member to their team. Now generally available, the Member tab on the Account Management page allows partner account managers to take care of their own team members. They can create, edit, reset passwords for, activate, and deactivate members of their teams without getting an internal admin involved.

[Require Unique Usernames for Partners at the Org Level](#)

You are no longer required to create a username that is different from all the usernames ever created, when adding someone to a community. Select **Require unique usernames for partners in this org** to contain the unique username requirement to one org and one org only. After you enable this preference, it can't be reversed.

[Ignore the Rules and Allow Greater Flexibility with Budgets](#)

Need a little flexibility around market development budgets? Go ahead, give yourself a bit of wiggle room. Now you can relax validation around how funds are allocated, requested, and claimed without going over budget. Select **Ignore Validation** to ignore the validation rules associated with a budget.

[Control Community User Visibility \(Beta\)](#)

No peeking! Now you can ensure that members can see only members of the community that they're logged into. Enable Community User Visibility to control member visibility on a community-by-community basis.

[Include Partner Users on Account and Opportunity Teams in Lightning Experience](#)

Now account and opportunity teams using Lightning Experience can include partner users too, not just internal users.

Drive Data Sharing in a Multi-Tier Distribution Channel with Partner Relationships (Pilot)

Use clicks, not code to quickly set up partner channels and manage the complex relationships between partners. With Partner Relationships, you can easily model multi-tiered distribution networks and share only select information between partners so they can work better together. For example, with Partner Relationships, distributors can see all of their resellers' opportunities and franchise owners can update the leads of their retail stores.

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:** We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. Partner Relationships only support leads, opportunities, and custom object as a pilot. 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: External users with a Partner Community and Customer Community Plus licenses have access to Partner Relationships.

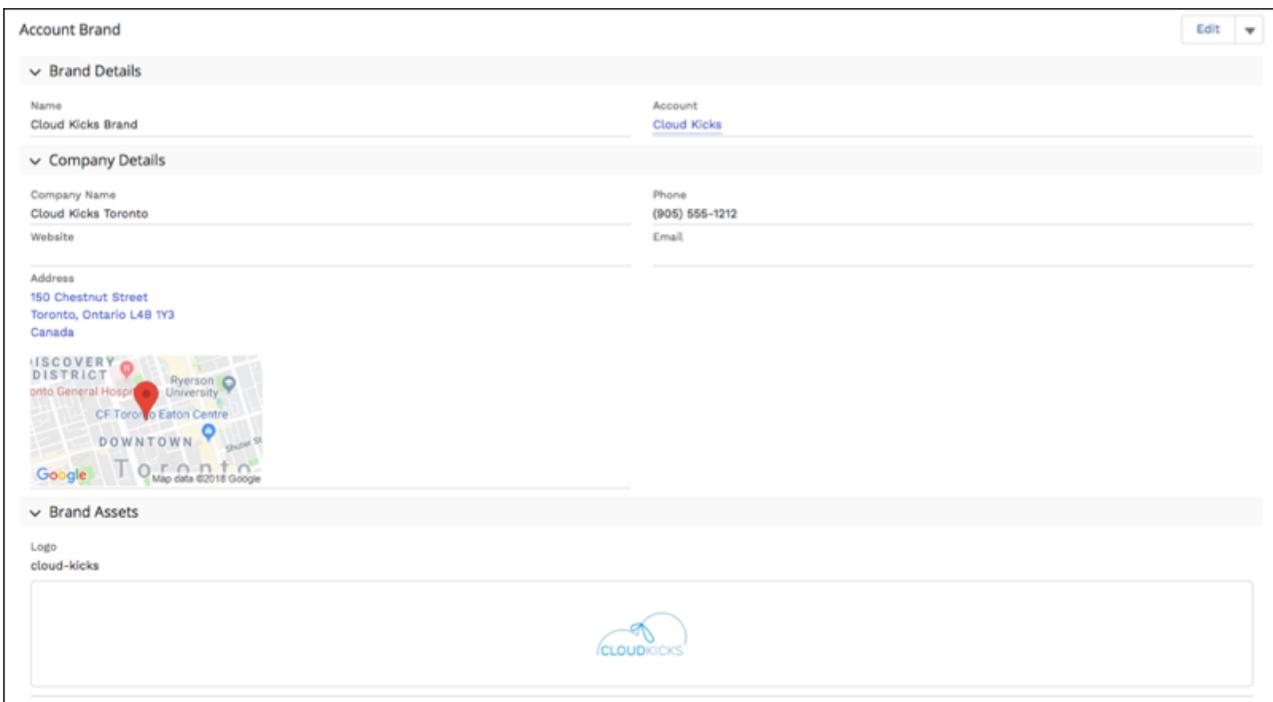
 **Note:** Partner Relationships currently only support leads, opportunities, and custom objects.

Manage and Share Brand Information and Include It in Co-Branded Email Templates (Generally Available)

Channel account managers can upload brand logos and company information. Admins and channel managers can include this information in co-branded email templates that partners can use in marketing campaigns, deal communications, and websites.

Where: This feature is available in Salesforce Tabs + Visualforce and Lightning communities. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Add the Account Brand related list to account page layouts. Channel managers can add brand information by selecting the **Account Brand** tab in Account Management and clicking **New**.



Merge fields under **Sender Brand** pull information from Account Brand directly into the email template.

 **Note:** Co-branded email templates are available to internal users with access to Account Brand. Using Account Brand merge fields without access to Account Brands results in unresolved merge fields.

Encourage External Delegated Admins to Manage Their Teams (Generally Available)

Vendor admins no longer have to be the go-to for partner account managers when someone gets locked out of their account or adds a member to their team. Now generally available, the Member tab on the Account Management page allows partner account managers to take care of their own team members. They can create, edit, reset passwords for, activate, and deactivate members of their teams without getting an internal admin involved.

Where: This feature is available in communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: External users with a Partner Community or Customer Community license and delegated admin permissions have access to the Account Management page. Add the **Community Members** related list to **Accounts**, so partners can access member information.

Members			
3 Items			
FULL NAME	EMAIL	TITLE	ACTIVE
Geoff Minor	info@salesforce.com	Account Executive	<input checked="" type="checkbox"/>
Jon Amos	info@salesforce.com	Sales Manager	<input checked="" type="checkbox"/>
Carole White	info@salesforce.com	VP Sales	<input checked="" type="checkbox"/>

How: Members created through Account Management use the new **Community Member Layout**, which can be found in **User Page Layouts**.

Require Unique Usernames for Partners at the Org Level

You are no longer required to create a username that is different from all the usernames ever created, when adding someone to a community. Select **Require unique usernames for partners in this org** to contain the unique username requirement to one org and one org only. After you enable this preference, it can't be reversed.

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: New orgs created after Winter '19 contain username uniqueness at the org level. Contact Salesforce Customer Support to enable this option in orgs created before Winter '19. Go to **Setup > Communities Settings** to turn on this preference. This option requires partners to provide their org IDs when logging in through an API.

 **Note:** Uploads using Data Loader, Excel Import, and Sendia are not available to partner users with this preference enabled.

Ignore the Rules and Allow Greater Flexibility with Budgets

Need a little flexibility around market development budgets? Go ahead, give yourself a bit of wiggle room. Now you can relax validation around how funds are allocated, requested, and claimed without going over budget. Select **Ignore Validation** to ignore the validation rules associated with a budget.

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: Internal users with access to Market Development budgets can update **Ignore Validation**.

 **Note:** After you create a budget, all associated allocations, requests, and claims are subject to the same validation criteria. Any time you update one of the fields, you must link them to a budget with the same validation criteria.

Control Community User Visibility (Beta)

No peeking! Now you can ensure that members can see only members of the community that they're logged into. Enable Community User Visibility to control member visibility on a community-by-community basis.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Enterprise, Performance, Unlimited, and Developer editions. Contact Salesforce Customer Support to enable this beta feature.

 **Note:** This release contains a closed beta version of Community User Visibility, which means it's a high-quality feature with known limitations. To enable this feature, file a ticket with Salesforce Customer Support. Community User Visibility 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 Customer User Visibility in the [Community Cloud group](#) in the Trailblazer Community.

Include Partner Users on Account and Opportunity Teams in Lightning Experience

Now account and opportunity teams using Lightning Experience can include partner users too, not just internal users.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Include Partner Users on Account Teams in Lightning Experience](#)

[Include Partner Users on Opportunity Teams in Lightning Experience](#)

Sharing: Sharing Set Support for More Licenses and More Objects, Clickjack Protection for iframes

Use sharing sets with all Customer and Partner Community licenses and with more objects. Use Google's IP Anonymization to help with privacy concerns. Protect your community from clickjack attacks.

IN THIS SECTION:

[Improve Security for Sites and Communities by Restricting Record Access for Guest Users](#)

To address potential security vulnerabilities, we applied a critical update to Salesforce sites and communities on October 5, 2018. This update removed default record access for guest users so that they can no longer create, read, update, or delete Salesforce records. You can give guest users access to your Salesforce records by editing your object permissions.

[Limit Guest User Access to Activities](#)

Ensure that the work your reps and agents do remains private. With the Access Activities permission, users, such as guest users in communities, don't have access to any tasks, events, and emails.

[Use Sharing Sets with All Customer and Partner Licenses \(Generally Available\)](#)

Previously, when you upgraded to Customer Community Plus, you lost sharing access via sharing sets because they were limited to Customer Community users. Now your Customer Community users retain sharing sets after upgrading and you can also use sharing rules and role-based sharing to control access to data. And you can even use sharing sets with users who have Partner Community licenses.

[Use Sharing Sets with Contacts with Multiple Accounts \(Beta\)](#)

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.

[Use Sharing Sets with Campaigns, Opportunities, and Orders \(Beta\)](#)

You can now grant portal or community users access to records that are associated with their campaigns, opportunities, and orders using sharing sets.

[Use the New Content Security Policy to Better Protect Your Community](#)

New settings give you the option to apply different levels of Content Security Policy (CSP) to your community, including strict CSP. Strict CSP standards protect you and your customers by allowing content only from explicitly whitelisted external hosts to display in your communities and by blocking all inline scripts.

[Enhance Your Community Privacy with Google IP Anonymizer](#)

If you use Google Analytics, you can now also turn on Google's IP Anonymization to help with privacy compliance or concerns. Protect the privacy of your customers with just a mouse click.

[Secure iframes with Clickjack Protection on Sites and Communities](#)

You no longer have to choose between securing your site or community with clickjack protection or using iframes. Now you can manage a list of domains to allow framing on and protect your site or community from clickjack attacks.

[Enable Users to Log In with Their Email, Phone Number, or Any Identifier You Choose](#)

In just a few clicks, you can deploy login pages that simplify how external users log in to your community. With the Login Discovery feature, you can let your external users identify themselves using something other than a username, such as a phone number. Instead of a password, they can verify their identity with a code sent to their email or mobile device. And, if your org is enabled with multiple Identity Providers (IdPs), login is a one-step process—users bypass verification altogether.

[Allow Visitors to Join Your Community by Email or Phone](#)

Make it easy for customers to join your community. Instead of requiring a username and password to register, let them join by entering their email address or phone number. Configurable self-registration simplifies the sign-up process. It allows you to register users quickly and with minimal information. After the user is created, you can build the user's profile progressively when logging in later. For example, you can collect more user information based on context or the type of interaction.

[Customize the One-Time Password Email Template for Identity Verification](#)

Tailor your community's identity verification emails. When users verify their identity by email, Salesforce sends a generic email notification with a verification code. You can reword the message to control how you communicate with your customers and partners.

[Give Internal Users Login Access to Communities Through an External Authentication Provider](#)

Previously, internal users accessed a community either through the community login page or by logging in to Salesforce and accessing the community through SAML single sign-on (SSO). Now internal users can access a community through an external authentication provider for apps that support the OpenID Connect protocol, such as Facebook.

[Set Different Login Policies for Internal Community Users \(Generally Available\)](#)

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. Also, OAuth authentication for internal users is now supported on community domains.

Improve Security for Sites and Communities by Restricting Record Access for Guest Users

To address potential security vulnerabilities, we applied a critical update to Salesforce sites and communities on October 5, 2018. This update removed default record access for guest users so that they can no longer create, read, update, or delete Salesforce records. You can give guest users access to your Salesforce records by editing your object permissions.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic. This change applies to Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, enter *Critical Updates* in the Quick Find box. Then select **Critical Updates**. For Restrict Record Access for Guest Users, click **Acknowledge**.

- For Communities

In Community Builder, click the Settings icon, and select **General**. Under Guest User Profile, click the profile name. Click **Edit**. Under Standard Object Permissions, confirm that the profile reflects the permissions you intend for guest users to have to create, read, update, and delete Salesforce records.

- For Salesforce Sites

From Setup, enter *Sites* in the Quick Find box, then select **Sites**. Click the name of the site that you want to control. Click **Public Access Settings**. Under Standard Object Permissions, confirm that the profile reflects the permissions you intend for guest users to have to create, read, update, and delete Salesforce records.

SEE ALSO:

[Knowledge Article: Security vulnerability impact on Salesforce Sites and Communities](#)

Limit Guest User Access to Activities

Ensure that the work your reps and agents do remains private. With the Access Activities permission, users, such as guest users in communities, don't have access to any tasks, events, and emails.

This change applies to Lightning communities and Salesforce Tabs + Visualforce communities, accessed through Lightning Experience, all versions of the Salesforce app, and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Control Access to Activities](#)

Use Sharing Sets with All Customer and Partner Licenses (Generally Available)

Previously, when you upgraded to Customer Community Plus, you lost sharing access via sharing sets because they were limited to Customer Community users. Now your Customer Community users retain sharing sets after upgrading and you can also use sharing rules and role-based sharing to control access to data. And you can even use sharing sets with users who have Partner Community licenses.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic. This change applies to Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Who: Access granted to users via sharing sets does not roll up to users above them in the role or territory hierarchies.

 **Note:** The share group functionality is still not available to users with Customer Community Plus and Partner Community licenses.

Use Sharing Sets with Contacts with Multiple Accounts (Beta)

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. This change applies to Enterprise, Essentials, Performance, Unlimited, and Developer editions.

 **Note:** As a beta feature, Sharing Sets for Contacts with Multiple Accounts 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 Sharing Sets for Contacts with Multiple Accounts in the [IdeaExchange](#) or the Sharing Sets for CMA group in the Trailblazer Community.

For information on enabling this feature in your org, contact Salesforce.

Who: Users with the following licenses can use sharing sets:

- Customer Community Login User
- Customer Community Plus and Partner Community Licenses
- Customer Community User

How: In Setup, search for *Communities Settings* and [create a sharing set](#). Under Configure Access, select

Contact.RelatedAccount in the User dropdown list and **Account** in the Target Object field.

SEE ALSO:

[Salesforce Help: Set Up Contacts to Multiple Accounts](#)

[Salesforce Help: Use Sharing Sets in Communities](#)

Use Sharing Sets with Campaigns, Opportunities, and Orders (Beta)

You can now grant portal or community users access to records that are associated with their campaigns, opportunities, and orders using sharing sets.

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:** As a beta feature, Sharing Sets for CRM 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. Contact Salesforce Customer Support to enable this pilot feature. You can provide feedback and suggestions for Sharing Sets for CRM in the [Trailblazer Community](#).

How: To enable Sharing Sets for Campaigns, Opportunities, and Orders in your org, contact Salesforce Customer Support. Specify which object, or all three, you want to use with sharing sets.

Use the New Content Security Policy to Better Protect Your Community

New settings give you the option to apply different levels of Content Security Policy (CSP) to your community, including strict CSP. Strict CSP standards protect you and your customers by allowing content only from explicitly whitelisted external hosts to display in your communities and by blocking all inline scripts.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: Unfettered access by third-party hosts into a site isn't the most secure way to do business. Salesforce has always had ways to whitelist external hosts through CSP Trusted Sites. However, up to now we've been a bit more relaxed in Communities because they were mostly self-contained. With the addition of features like Content Management, greater control is needed. While we recommend strict CSP, you can choose a less secure option that allows you to continue to run inline scripts with or without whitelisting.

 **Note:** With the addition of this feature, we removed “Enable Stricter CSP for Lightning Components in Communities” option in your Critical Update Console.

How: With Winter '19, we'll automatically set existing communities to the least restrictive CSP setting to ensure they continue to work. New communities will automatically be set to Strict CSP. You can choose a different level if needed.

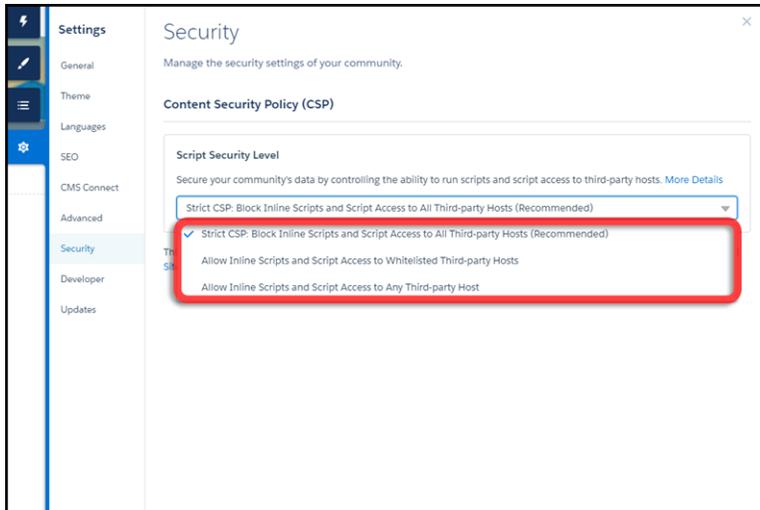


Table 1: Content Security Policy Options

Script Security Level	Description
Strict CSP: Block Inline Scripts and Script Access to All Third-party Hosts	Recommended. Ensures that no inline scripts can run in your site. Only non-script resources, such as images, from approved third-party hosts are allowed to display when added to the CSP Trusted Sites list in Salesforce org settings.
Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts	Hosts whitelisted with Add Trusted Site can execute inline scripts in your community. Non-script resources, such as images, must be whitelisted separately through CSP Trusted Sites in your Salesforce org settings.
Allow Inline Scripts and Script Access to Any Third-party Host	(Default) The least secure setting, but ensures that your community works as designed until you can review and update your site.  Note: This CSP option will be retired in the Winter '20 release. Start planning for that transition now to avoid issues later.

SEE ALSO:

[Salesforce Help: Content Security Protocol \(CSP\) \(can be outdated or unavailable during release preview\)](#)

[Discover CMS for Community Cloud \(Beta\)](#)

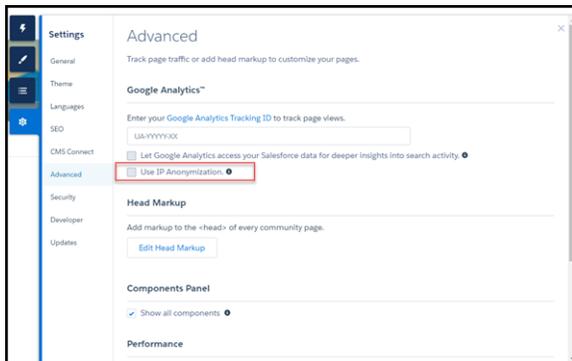
Enhance Your Community Privacy with Google IP Anonymizer

If you use Google Analytics, you can now also turn on Google's IP Anonymization to help with privacy compliance or concerns. Protect the privacy of your customers with just a mouse click.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic. This change applies to Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Who: This feature is available to all Community admins.

How: Enable this feature on the Advanced tab of your Community settings.



SEE ALSO:

[Salesforce Help: Google Analytics™ for Salesforce Communities Package](#)

Secure iframes with Clickjack Protection on Sites and Communities

You no longer have to choose between securing your site or community with clickjack protection or using iframes. Now you can manage a list of domains to allow framing on and protect your site or community from clickjack attacks.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic. This change applies to Enterprise, Essentials, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Enable Clickjack Protection in Communities](#)

Enable Users to Log In with Their Email, Phone Number, or Any Identifier You Choose

In just a few clicks, you can deploy login pages that simplify how external users log in to your community. With the Login Discovery feature, you can let your external users identify themselves using something other than a username, such as a phone number. Instead of a password, they can verify their identity with a code sent to their email or mobile device. And, if your org is enabled with multiple Identity Providers (IdPs), login is a one-step process—users bypass verification altogether.

Where: This feature is available in all communities, accessed through Lightning Experience, Salesforce Classic, and all versions of the mobile app. This feature is available in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

How: Build Login Discovery login pages on the Login & Registration page of the Administration Workspace. Choose the Login Discovery Page login type, which generates a login handler that you extend in Apex. You can locate the login handler from the Setup Apex Classes page. Its name begins with `AutocreatedDiscLoginHandler`.

SEE ALSO:

[Let External Users Log In with Their Phone Number, Email, or Any Identifier You Choose](#)

Allow Visitors to Join Your Community by Email or Phone

Make it easy for customers to join your community. Instead of requiring a username and password to register, let them join by entering their email address or phone number. Configurable self-registration simplifies the sign-up process. It allows you to register users quickly and with minimal information. After the user is created, you can build the user's profile progressively when logging in later. For example, you can collect more user information based on context or the type of interaction.

Where: This feature is available in all communities, accessed through Lightning Experience, Salesforce Classic, and all versions of the mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Enable configurable self-registration on the Login & Registration page of the Administration Workspace. Choose the Configurable Self-Reg Page registration type, which generates a self-registration handler that you extend in Apex. You can locate the handler from the Setup Apex Classes page. Its name begins with `AutocreatedConfigSelfReg`.

SEE ALSO:

[Let Visitors Sign Up for Your Community by Email or Phone](#)

Customize the One-Time Password Email Template for Identity Verification

Tailor your community's identity verification emails. When users verify their identity by email, Salesforce sends a generic email notification with a verification code. You can reword the message to control how you communicate with your customers and partners.

Where: This feature is available in all communities, accessed through Lightning Experience, Salesforce Classic, and all versions of the mobile app. This feature is available in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

How: Enable the One-Time Password email template from the Emails page of the Administration Workspace. Then edit the template from Setup under Email Templates.

SEE ALSO:

[Add Your Own Voice to Salesforce Boilerplate Identity Verification Emails](#)

Give Internal Users Login Access to Communities Through an External Authentication Provider

Previously, internal users accessed a community either through the community login page or by logging in to Salesforce and accessing the community through SAML single sign-on (SSO). Now internal users can access a community through an external authentication provider for apps that support the OpenID Connect protocol, such as Facebook.

Where: This change applies to all communities in Enterprise, Performance, Unlimited, and Developer editions.

How: Your Salesforce developer must update the Apex `createUser(portalId, userData)` registration handler method to account for both internal and external user creation during OpenID Connect SSO to communities. For example, the developer can use a unique attribute in the `userData` object to determine whether the newly created user is internal or external.

The remaining processes of creating external users, configuring the service provider website, and defining the authentication provider in your org remain the same.

SEE ALSO:

[Salesforce Help: Configure Authentication Providers \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: External Authentication Providers \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: RegistrationHandler Interface \(can be outdated or unavailable during release preview\)](#)

Set Different Login Policies for Internal Community Users (Generally Available)

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. Also, OAuth authentication for internal users is now supported on community domains.

Where: This change applies to Lightning communities and Salesforce Tabs + Visualforce communities accessed through Lightning Experience and Salesforce Classic and all versions of the Salesforce app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Set Different Login Policies for Salesforce and Community Users \(Generally Available\)](#)

Usability and Performance Enhancements: Improved Dependent Picklist Controls and Support for Optional URL Query Parameters

Improve your guest users' experience when on record pages, and enjoy a faster page response with support for optional URL query parameters.

IN THIS SECTION:

[Dependent Picklists No Longer Have a Default Value Selected](#)

Dependent picklists in communities no longer have a default value when loaded, so they now work the same in communities as they do in your internal org. We made this change because picklists did not consistently assign default values in all environments. If your site design or code assumes a default picklist selection, you need to adjust it.

[Guest Users Are Redirected to a Login Page When Visiting Record Pages](#)

We've standardized the guest user experience for all Record pages. Now guest users are redirected to a login page when attempting to visit Record Detail, Record List, or Record Related List pages. Previously, guest users were redirected to a login only when trying to access the Record Detail page.

[Get Faster Page Response with Support for Optional URL Query Parameters](#)

To improve performance and flexibility, we added support for query parameters to navigateToURL. {!EL} expressions are automatically replaced with a dynamic Aura expression. The Aura expression updates at runtime to parameters provided by the current page, such as parameters from the route or URL query parameters. This change improves performance because only components that are necessary during navigation events are loaded rather than reloading the entire page. However, this change can mean that custom components may not work as expected.

[Decrease Page Load Times with Community Content Delivery Network \(Generally Available\)](#)

Introduced as a pilot feature in Winter '18, the Community Content Delivery Network (CDN) is now available to everyone for free. Use the CDN to decrease your community's page load time and improve your members experience.

Dependent Picklists No Longer Have a Default Value Selected

Dependent picklists in communities no longer have a default value when loaded, so they now work the same in communities as they do in your internal org. We made this change because picklists did not consistently assign default values in all environments. If your site design or code assumes a default picklist selection, you need to adjust it.

Where: This change is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Help: Dependent Field Considerations](#)

[Developer Documentation: Build UI for Picklists](#)

Guest Users Are Redirected to a Login Page When Visiting Record Pages

We've standardized the guest user experience for all Record pages. Now guest users are redirected to a login page when attempting to visit Record Detail, Record List, or Record Related List pages. Previously, guest users were redirected to a login only when trying to access the Record Detail page.

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: For the redirect to work, the guest user must be able to access to the correct object. For the Record List page, the guest user must have access to the appropriate entity. For the Record Related List page, the guest user must have access to the entity of the related list and the parent record to which the related list is attached.

Get Faster Page Response with Support for Optional URL Query Parameters

To improve performance and flexibility, we added support for query parameters to navigateToURL. `{!EL}` expressions are automatically replaced with a dynamic Aura expression. The Aura expression updates at runtime to parameters provided by the current page, such as parameters from the route or URL query parameters. This change improves performance because only components that are necessary during navigation events are loaded rather than reloading the entire page. However, this change can mean that custom components may not work as expected.

Where: This change affects Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: This change affects Lightning components at runtime that have the following characteristics.

- The component has a required String attribute, which doesn't have a default value.
- The component has a corresponding design attribute.
- The value of the design attribute is an "`{!EL}`" expression. The expression can be set either as a default value on the design attribute or by changing the value in the Community Builder component properties.
- The component lives on a page that has no parameter from the route or from the URL query strings for the `{!EL}` value.

 **Warning:** Previously, a component didn't load if it met all these characteristics. Starting with Winter '19, Aura tries to load the component regardless, which means that some components might now show on a page with errors in them.

For instance, if your component has a required attribute with an EL value (such as `{!urlName}`, `{!topicId}`, `{!recordId}`), and that component lives on a page that does not provide that parameter, it will now show up on your page with an undefined attribute.

How: If you've written custom components that meet the above characteristics, check your code to make sure that you're not performing unsafe operations on component attributes that might now be undefined.

You can also add a conditional around your component markup based on whether the attribute is empty or not.

```
<aura:renderIf isTrue="{! !empty(v.myAttribute) }">
  ...
</aura:renderIf>
```

As always, we recommend that you test out your implementation in a sandbox before deploying in production.

SEE ALSO:

[Developer Documentation: force:navigateToURL Reference \(can be outdated or unavailable during release preview\)](#)

Decrease Page Load Times with Community Content Delivery Network (Generally Available)

Introduced as a pilot feature in Winter '18, the Community Content Delivery Network (CDN) is now available to everyone for free. Use the CDN to decrease your community's page load time and improve your members experience.

Where: This feature is available in all communities accessed through Lightning Experience and Salesforce Classic. CDN is available in Enterprise, Performance, and Unlimited editions.

How: Provision and activate the CDN by editing your custom domain. Select **Salesforce serves the domain over HTTPS, using a Salesforce content delivery network (CDN) partner and a shared HTTPS certificate** and click **Save**.

Provisioning takes 2–6 hours, but requires no downtime and you are emailed when it's finished. When it's complete, activate your domain. Activation takes 10–15 minutes and does temporarily make your community unavailable, so we recommend doing this step at a time when traffic is light.

You have up to 5 TB of CDN usage annually. Renewals are automatic and happen with zero downtime. If you exceed the limit before the end of the cycle, communities in your org using the CDN are redirected. No worries though, we let you know well before that happens. And if you're curious, we've created a report that lets you keep tabs on your usage levels.

Communities Documentation: Enjoy a Flurry of Fresh Winter Content

We refreshed our content offerings with several new pieces that explain the nuances of sharing CRM data securely in Communities. We also cleaned out some stale material and consolidated our content to make it searchable from Salesforce Help.

Why: Sharing the right CRM data with the right people in your community is essential for success. But understanding exactly who sees what can sometimes feel a little daunting. We get that. That's why we created a range of new material that explains how to share data in your community securely. It's time to curl up and get cozy with some great new content.

- [Share CRM Data with Your Partners](#): This Trailhead project gives you hands-on practice with setting up sharing settings for external users, such as external org-wide defaults, account roles and the role hierarchy, sharing rules, and sharing sets.
- [Who Sees What in Communities](#): This video series explains how to share data securely with external users through portals and communities. Learn about external org-wide defaults, account roles, sharing rules, and more.
- [Sharing CRM Data in a Portal or Community](#): This handy cheat sheet contains lots of useful resources around setting up data sharing for your portal or community.

As we welcome in new material, it's also time to bid farewell to the *Using Templates to Build Communities* guide, which we retired. All the information from this guide—and so much more—is now available in Salesforce Help, which is fully searchable and translated into all supported languages. If you prefer to download your content, use the [Set Up and Manage Communities](#) guide instead, which consolidates all help topics into a single PDF.

Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

IN THIS SECTION:

[Use Lightning External Apps and Lightning External Apps Plus Licenses to Create Custom Digital Experiences](#)

We are introducing two community user licenses, Lightning External Apps and Lightning External Apps Plus, for customers who want to create highly customized digital experiences for a broad range of external members. The licenses include more platform capabilities, such as custom objects, API calls, and file and data storage, to support customization and application development and take advantage of our seamless integration with the Salesforce platform. The Lightning External Apps Plus license also lets you tie in CRM objects and embed Einstein Analytics dashboards. You can combine these licenses with other community licenses, or they can stand alone.

[Find All the Community Content Features in One Workspace Location](#)

To help you easily find all the new content-related features for Communities, we re-purposed and renamed Content Targeting to Content Management in Workspaces. Content Management includes some existing features, like CMS Connect and Topics.

[Better Place for Time in Feeds](#)

When you visit a community feed on your desktop or mobile device, the date and time are easier to see. The timestamp appears under the author's name, out of the way of the row of actions that appear below the content.

[Provide Your High-Volume Community Users with Access to Data Privacy Records](#)

Now high-volume community users can store settings for data privacy using the Individual object. Use sharing sets and share groups to make the individual records available.

[Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time](#)

Use the Change Owner page-level button to assign a new owner for up to 200 selected leads, cases, or custom objects. You can access the button in the page-level action menu in a list view or related list in standard table mode or in Related List Quick Links.

[Give Guest Users Permission to Create Surveys and Ideas](#)

Give guest users of public communities permission to create, view, or update surveys and ideas.

[Manage Customer User Permission Has Been Removed from All Standard Profiles](#)

The Manage Customer User permission has been removed from all standard profiles to give admins more control over who can manage customer users. You can still grant this access to users who manage customer and partner users. To grant access on standard profiles, create a permission set with the same access as the Manage Customer User permission and assign it to standard profiles as needed. To grant access on custom profiles, either manually enable the Manage Customer User permission or assign a perm set that grants the same permissions.

Use Lightning External Apps and Lightning External Apps Plus Licenses to Create Custom Digital Experiences

We are introducing two community user licenses, Lightning External Apps and Lightning External Apps Plus, for customers who want to create highly customized digital experiences for a broad range of external members. The licenses include more platform capabilities, such as custom objects, API calls, and file and data storage, to support customization and application development and take advantage of our seamless integration with the Salesforce platform. The Lightning External Apps Plus license also lets you tie in CRM objects and embed Einstein Analytics dashboards. You can combine these licenses with other community licenses, or they can stand alone.

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.

SEE ALSO:

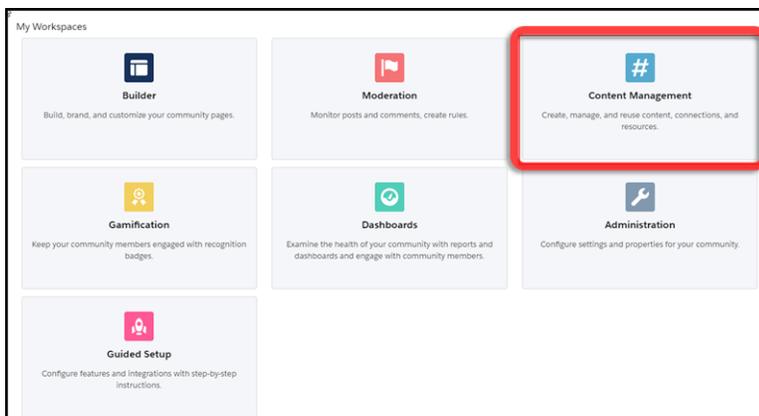
[Give Communities Users Analytics Insights Under the New License](#)

Find All the Community Content Features in One Workspace Location

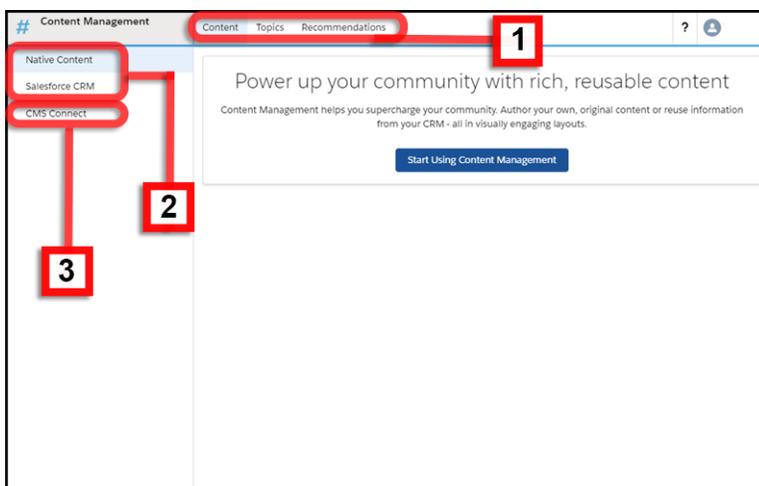
To help you easily find all the new content-related features for Communities, we re-purposed and renamed Content Targeting to Content Management in Workspaces. Content Management includes some existing features, like CMS Connect and Topics.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic. Communities are available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

Why: You see the Content Management tile when you open Community Workspaces.



Click it to access tabs (1) to create and manage content, such as native content, like posts, and Salesforce CRM objects, such as inventory for display in your community (2). You can also manage topics and recommendations, and your old friend CMS Connect feeds (3).

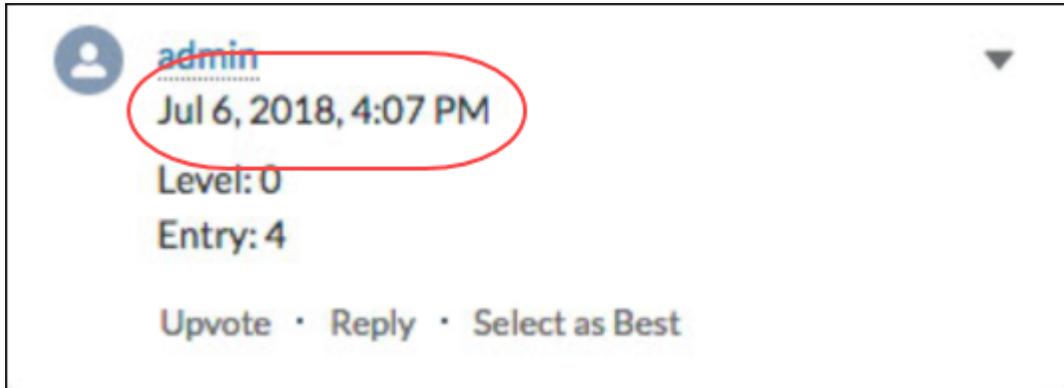


Better Place for Time in Feeds

When you visit a community feed on your desktop or mobile device, the date and time are easier to see. The timestamp appears under the author's name, out of the way of the row of actions that appear below the content.

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 date and time aren't gone. They're just in a better place.



Provide Your High-Volume Community Users with Access to Data Privacy Records

Now high-volume community users can store settings for data privacy using the Individual object. Use sharing sets and share groups to make the individual records available.

Where: This change applies to all communities hosted on orgs with Customer Community, Customer Community Plus, and Partner Community licenses.

How: To create a sharing set that enables high-volume community users to access their individual records, refer to [Sharing Set Overview](#).

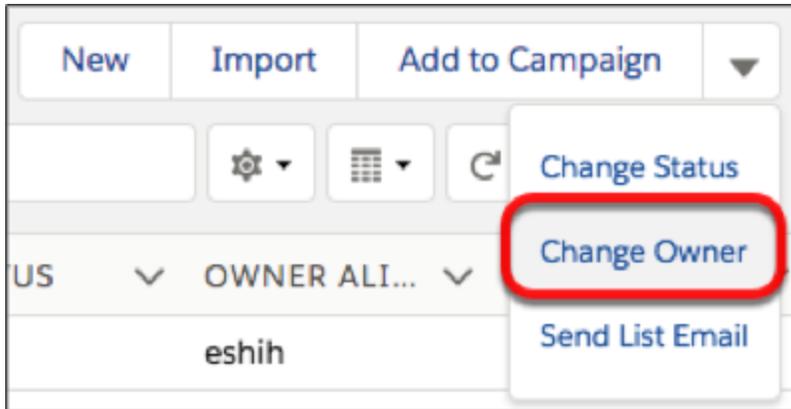
Assign a New Owner to Multiple Leads, Cases, or Custom Objects at One Time

Use the Change Owner page-level button to assign a new owner for up to 200 selected leads, cases, or custom objects. You can access the button in the page-level action menu in a list view or related list in standard table mode or in Related List Quick Links.

Where: This feature is available in Lightning communities accessed through Lightning Experience and Salesforce Classic, and is available in Enterprise, Performance, Unlimited, and Developer editions.

How: Select up to 200 records and click Change Owner in the page-level action menu, or (depending on your page layout) click  in the page-level action menu and then click Change Owner.





In the Change Owner dialog box, enter the new owner name, select Send Email Notification if needed, and click Submit. You must have Edit permission for a selected record to change its owner.

Give Guest Users Permission to Create Surveys and Ideas

Give guest users of public communities permission to create, view, or update surveys and ideas.

Where: This change applies to all communities accessed through Lightning Experience and Salesforce Classic, and is available in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

How: From Community Builder, access a community's guest user profile and set the following permissions for Surveys:

- Surveys: Read
- Survey Invitations: Read
- Survey Responses: Read, Create, and Edit

For Ideas, set the following permissions:

- Ideas: Read
- Idea Themes: Read

Manage Customer User Permission Has Been Removed from All Standard Profiles

The Manage Customer User permission has been removed from all standard profiles to give admins more control over who can manage customer users. You can still grant this access to users who manage customer and partner users. To grant access on standard profiles, create a permission set with the same access as the Manage Customer User permission and assign it to standard profiles as needed. To grant access on custom profiles, either manually enable the Manage Customer User permission or assign a perm set that grants the same permissions.

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.

Chatter: Draft Posts, Cursor Focus Improvement, Date Format Fix

Automatically save your posts as drafts as you're composing. Now when you post, the cursor moves to the text body instead of the To field so you can start writing your post right away.

IN THIS SECTION:

[Save Your Chatter Posts as Drafts](#)

Have you ever lost your work in the middle of writing an important Chatter post? We know how frustrating that is. Introducing Draft Posts, a new option to automatically save all your unpublished feed items.

[Cursor Focus in Chatter Publisher Has Changed](#)

We changed the cursor focus when you click in the Chatter publisher to post something. Old way: Focus goes to the To field. New way: Focus snaps your cursor to the text box. It saves you the step of positioning your cursor, so you can start posting right away.

Save Your Chatter Posts as Drafts

Have you ever lost your work in the middle of writing an important Chatter post? We know how frustrating that is. Introducing Draft Posts, a new option to automatically save all your unpublished feed items.

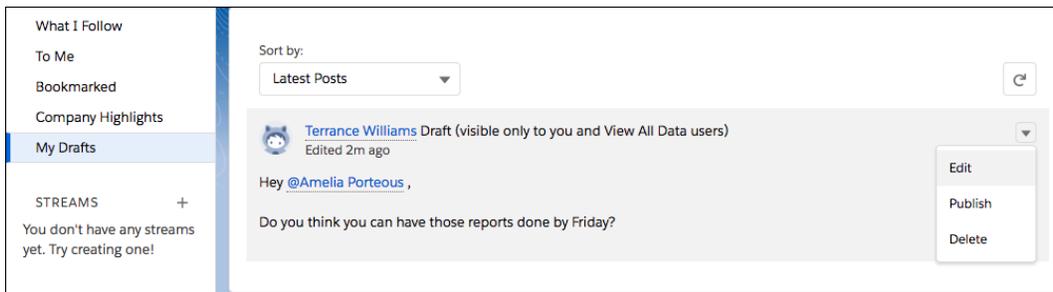
Where: This feature is available in Lightning Experience in Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: As you type a new post, Chatter saves your work to the My Drafts tab. Add files, links, images, mentions, hashtags, and any other rich text, because we save it all.

The screenshot shows the Chatter publisher interface with three tabs: "Post", "Poll", and "Question". The "Post" tab is selected. The text input area contains the text "Hey @[Amelia Porteous],
Do you think you can have those reports done by Friday?". Below the text is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Link (L), Text Color (T), List (ul), Bulleted List (li), Image (img), Emoticon (smiley), and User (person). Below the toolbar, the "To" field is set to "My Followers". A small tooltip reads "To link to a record, enter / then start typing the record name." At the bottom right, there is a "Saving..." label and a blue "Share" button.

The screenshot shows the Chatter publisher interface with three tabs: "Post", "Poll", and "Question". The "Post" tab is selected. The text input area contains the text "Hey @[Amelia Porteous],
Do you think you can have those reports done by Friday?". Below the text is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Link (L), Text Color (T), List (ul), Bulleted List (li), Image (img), Emoticon (smiley), and User (person). Below the toolbar, the "To" field is set to "My Followers". A small tooltip reads "To link to a record, enter / then start typing the record name." At the bottom right, there is a "Saved" label and a blue "Share" button.

You can access your drafts in My Drafts to publish, edit, or delete them.



When you save a post with a hashtag, the corresponding topic is not created until the post is published.

How: To turn on Draft Posts in your org, navigate to the Chatter setup menu. Under the Draft Posts section, select **Allow draft posts**.

[Chatter REST API](#) and [Chatter in Apex](#) support draft posts.

Cursor Focus in Chatter Publisher Has Changed

We changed the cursor focus when you click in the Chatter publisher to post something. Old way: Focus goes to the To field. New way: Focus snaps your cursor to the text box. It saves you the step of positioning your cursor, so you can start posting right away.

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

Files: Sharing Folders Publicly and File Details on Mobile

Use public links to share folders, so you can deliver collections of files to your employees, partners, customers, and prospects. Access file details on the go with mobile file detail pages.

IN THIS SECTION:

[Share Multiple Files in a Folder Using Public Links](#)

What's better than sharing a single file with a public link? Sharing a bunch of files at once! You can create public links to share folders, giving recipients inside or outside your company access to sets of files. The public link is an encrypted URL. Folder Sharing in Lightning Experience provides an alternative to Content Packs in Classic.

[Go Mobile with the File Detail Page](#)

You now have access to the File Detail page on your mobile devices. On the details page, you can see a file preview and details about the file, like the owner and last modified date.

[Track File Stats with the File Engagement Card](#)

How many times have people viewed and downloaded your file? You can see these statistics at a glance in the File Engagement card on the file detail page. The file's lifetime views and downloads are counted from all user interfaces, including API and mobile.

[Other Changes in Files](#)

Learn about feature retirements and smaller changes to your files experience.

Share Multiple Files in a Folder Using Public Links

What's better than sharing a single file with a public link? Sharing a bunch of files at once! You can create public links to share folders, giving recipients inside or outside your company access to sets of files. The public link is an encrypted URL. Folder Sharing in Lightning Experience provides an alternative to Content Packs in Classic.

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

Why: Anyone with the link can view and download the files in the folder. You can change the folder's contents at any time, and the changes occur in real time. To remove access to the folder, delete the link. To make the folder public again, create a new link.

How: Add the link in the folder's row-level actions by clicking Public Link. Delete the link from the same dialog by clicking the trash can.



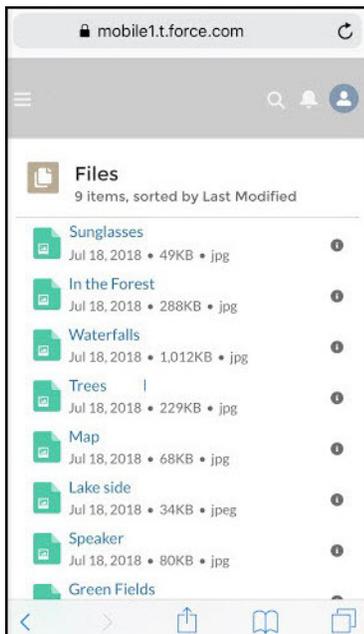
 **Note:** To download files from a folder in Safari, first disable your browser's popup blocker.

[Chatter REST API](#) supports folder sharing.

Go Mobile with the File Detail Page

You now have access to the File Detail page on your mobile devices. On the details page, you can see a file preview and details about the file, like the owner and last modified date.

Where: This change applies to the Salesforce app in Professional, Enterprise, Performance, and Unlimited editions.



Track File Stats with the File Engagement Card

How many times have people viewed and downloaded your file? You can see these statistics at a glance in the File Engagement card on the file detail page. The file's lifetime views and downloads are counted from all user interfaces, including API and mobile.

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

How: The File Engagement card is on the file detail page by default. You can remove it, or add it back, using the app builder.



 **Note:** Only file types that display a preview get view counts. Views and downloads through public links or content deliveries aren't counted in the file engagement stats.

Other Changes in Files

Learn about feature retirements and smaller changes to your files experience.

IN THIS SECTION:

[Ensure Access to Documents with Proper Permissions](#)

Ensure that Salesforce Classic users can access documents by verifying access to Documents in their profile. If users don't have Read access to Documents on their profile, they see an "Insufficient Privileges" error.

[Integrate Quip and Salesforce Classic](#)

Let users add Quip documents and spreadsheets to accounts, opportunities, leads, and most other records based on standard and custom objects.

[Content Delivery Daily Limits Increased](#)

You can view your content deliveries more times—formerly 20,000, now up to 50,000 times in a 24-hour period. We also raised the delivery bandwidth limit from 20 GB to 50 GB every 24 hours.

[Folders Enabled for All New Libraries](#)

All new libraries now have folders enabled by default.

[Content Delivery Search Bar Has Changed](#)

When creating content deliveries from a related list on a record, the option to search within libraries for an existing file is no longer available. You can browse your own personal directory and upload the file as a new file.

[View Content Previews from the File Detail Page](#)

When previewing a content document from the content detail page in Salesforce Classic, you're redirected to the Files Detail page.

[Full Previews No Longer Available Without Files Tab](#)

In Salesforce Classic, users without access to the Files tab can no longer open file thumbnails into full previews. To see the full preview, switch to Lightning Experience, or download the file.

[Multi-File Upload Not Available for Microsoft Internet Explorer Versions 9 and 10](#)

With the retirement of Flash, multi-file uploads are no longer available in the Files tab in Salesforce Classic in Internet Explorer versions 9 and 10. Users of these browsers can continue to upload files one at a time. Multi-file uploads are supported in Internet Explorer 11.

Ensure Access to Documents with Proper Permissions

Ensure that Salesforce Classic users can access documents by verifying access to Documents in their profile. If users don't have Read access to Documents on their profile, they see an "Insufficient Privileges" error.

Where: This change applies to Salesforce Classic in Professional, Enterprise, Performance, and Unlimited Editions.

How: Modify user profiles to allow at least Read access to the Document object on the profile.

Integrate Quip and Salesforce Classic

Let users add Quip documents and spreadsheets to accounts, opportunities, leads, and most other records based on standard and custom objects.

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

SEE ALSO:

[Salesforce Help: Set Up QuipCard for Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

Content Delivery Daily Limits Increased

You can view your content deliveries more times—formerly 20,000, now up to 50,000 times in a 24-hour period. We also raised the delivery bandwidth limit from 20 GB to 50 GB every 24 hours.

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

Folders Enabled for All New Libraries

All new libraries now have folders enabled by default.

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

Content Delivery Search Bar Has Changed

When creating content deliveries from a related list on a record, the option to search within libraries for an existing file is no longer available. You can browse your own personal directory and upload the file as a new file.

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

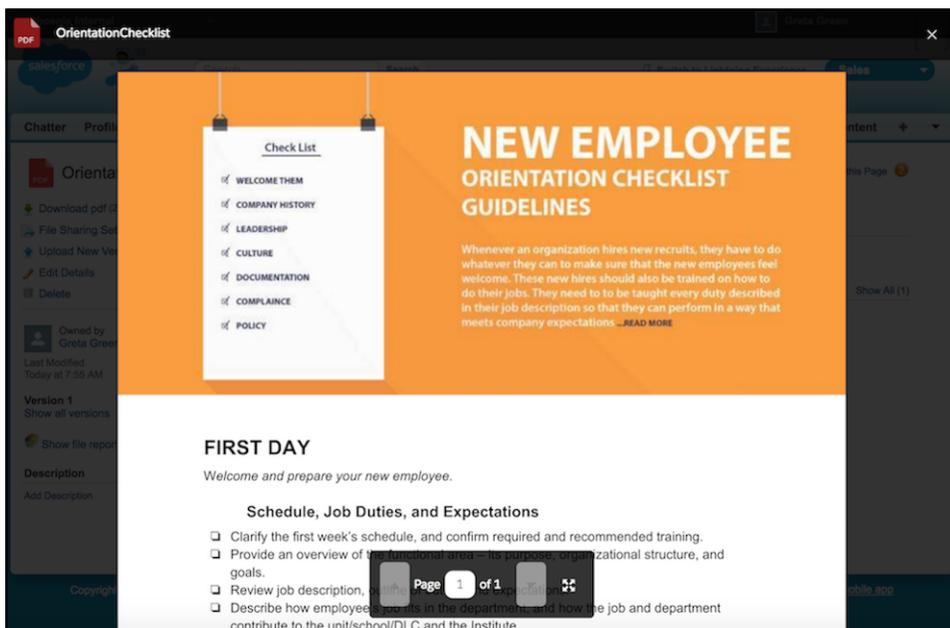
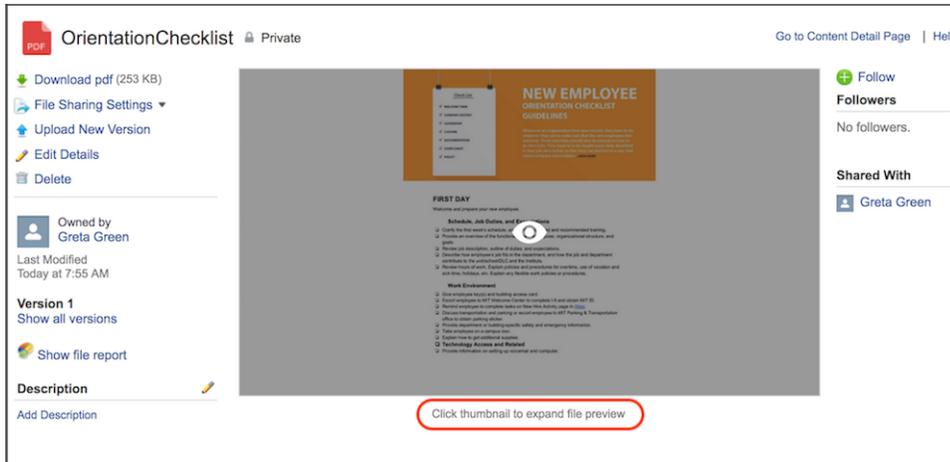
How: Go to the content delivery page of an existing file and create the delivery from there.

View Content Previews from the File Detail Page

When previewing a content document from the content detail page in Salesforce Classic, you're redirected to the Files Detail page.

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

How: Click the thumbnail preview to open the full screen, multi-page preview of the file.



Full Previews No Longer Available Without Files Tab

In Salesforce Classic, users without access to the Files tab can no longer open file thumbnails into full previews. To see the full preview, switch to Lightning Experience, or download the file.

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

Multi-File Upload Not Available for Microsoft Internet Explorer Versions 9 and 10

With the retirement of Flash, multi-file uploads are no longer available in the Files tab in Salesforce Classic in Internet Explorer versions 9 and 10. Users of these browsers can continue to upload files one at a time. Multi-file uploads are supported in Internet Explorer 11.

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

Mobile: Do More on the Go

Check out the latest features for getting more done no matter where you are.

IN THIS SECTION:

[Salesforce App: More Functionality on the Road](#)

The latest version of the Salesforce app includes the Rich Publisher Apps for Lightning communities so you can create more robust posts in community feeds. There's more territories opportunities and assignment capabilities, too. These new enhancements help keep your users moving no matter where their busy days take them.

Salesforce App: More Functionality on the Road

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IN THIS SECTION:

[Access the Salesforce 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 17.0. At a glance, here's what's new in the version 17.0 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.

[Winter '19 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 Winter '19 Salesforce enhancements that either aren't available, have functional gaps from the full site, or work differently in the mobile app.

Access the Salesforce 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 17.0. At a glance, here's what's new in the version 17.0 apps.

Salesforce for Android, Version 17.0

Salesforce for Android, version 17.0 will be released to Google Play the week of October 15, 2018 and gradually rolled out to customers over a couple of weeks.

Here's what's new in Salesforce for Android.

- [Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams](#) on page 119

Salesforce for iOS, Version 17.0

Beginning the week of October 15, 2018, the App Store starts serving up Salesforce for iOS, version 17.0.

Here's what's new in Salesforce for iOS.

- [Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams](#) on page 119

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.

The Salesforce app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Salesforce Mobile Web	Set Up in the Full Site
Device and Browser Support				
Updated Salesforce App Requirements	✓	✓	✓	
Sales Features				
Manage Territory Account Assignment on the Go	✓	✓	✓	✓
Find Your Territories' Opportunities on the Go	✓	✓	✓	✓
Opportunities: Edit Rights for Previous Team Owners and Partner Users on Teams	✓	✓	✓	
Include Reminders with Task Quick Actions	✓	✓	✓	
Einstein Insights: Access Account and Opportunity Insights from Your Mobile Device (Beta)	✓	✓		
Include Partner Users on Account and Opportunity Teams	✓	✓	✓	
Productivity Features				
Schedule Event Series (Beta)	✓	✓	✓	✓
Sync Event Series Between Microsoft® Calendars and Salesforce	✓	✓	✓	✓
Sync Event Changes Made Through the API	✓	✓	✓	
Salesforce Communities				
Now You Can Find the Time			✓	
Use Rich Publisher Apps on Your Mobile Devices			✓	
Business Logic and Process Automation				

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Salesforce Mobile Web	Set Up in the Full Site
See Approval Requests Assigned to Your Queues in All Salesforce Experiences	✓	✓	✓	

IN THIS SECTION:

[Include Partner Users on Account and Opportunity Teams](#)

Now your sales team can add partner users—not just internal users—to account and opportunity teams.

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 	<ul style="list-style-type: none"> • Samsung Tab A 9.7 • Samsung Tab A 8.0

Platform	Phones	Tablets
	<ul style="list-style-type: none"> • Samsung Galaxy S5 • Samsung Galaxy Note 5 • Samsung Galaxy Note 4 	
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.

Manage Territory Account Assignment on the Go

Users no longer have to switch to the full site to select **Evaluate this account against territory rules on save** when they're editing an account. With this checkbox selected, Salesforce runs assignment rules when an account is updated and saved. That way, territory assignments stay up to date.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

How:

The screenshot shows the 'Edit Account' screen in the Salesforce mobile app. At the top, there are 'Cancel', 'Edit Ac...', and 'Save' buttons. Below the buttons is a checkbox labeled 'Evaluate this account against territory rules on save', which is highlighted with a red circle. Underneath is a section titled 'ACCOUNT INFORMATION'. It contains the following fields: 'Account Owner' with the value 'Admin User', 'Account Name' with the value 'Acme', and 'Parent Account' with a search icon.

If you've added the checkbox to your account layout properties in the full site, it's available when users edit an account in the mobile app.

SEE ALSO:

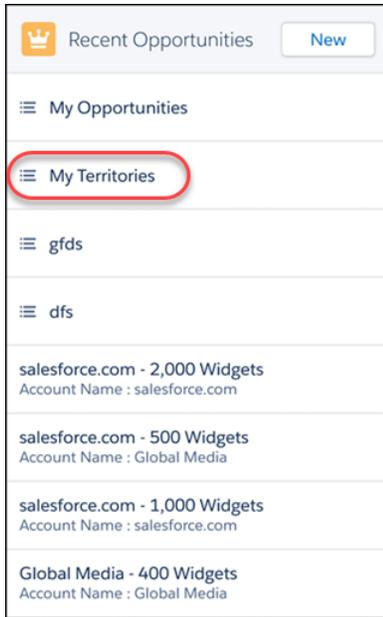
[Trigger Territory Assignment on Account Update in Lightning Experience](#)

Find Your Territories' Opportunities on the Go

Enterprise Territory Management users can easily find opportunities assigned to their territories in list views created with the My Territories and My Territory Team's filters.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Developer and Performance editions and in Enterprise and Unlimited editions with the Sales Cloud.

How:



If you've created an opportunity list view with a territory filter in the full site, the filter is available to use in the Salesforce app.

SEE ALSO:

[Filter Opportunity List Views by Territory](#)

Include Partner Users on Account and Opportunity Teams

Now your sales team can add partner users—not just internal users—to account and opportunity teams.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Include Partner Users on Account Teams in Lightning Experience](#)

[Include Partner Users on Opportunity Teams in Lightning Experience](#)

Winter '19 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 Winter '19 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.

Sales Features

Accounts: Account Teams

When adding account team members, sales reps see only the team member fields they're allowed to edit. Previously, reps could see all team member fields even if they couldn't update the values.

Productivity Features

Calendar: Schedule Event Series (Beta)

-  **Note:** As a beta feature, event series in Lightning Experience is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use event series 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.
- Platform Encryption, including deterministic encryption, isn't supported for event series. Single events in Lightning Experience, the Salesforce app, and all events in Salesforce Classic are encrypted.
 - If you don't see changes when you create, edit, or delete a series, click the refresh button.
 - Only the first event in a series shows attachments.
 - Events in a series can't be made to overlap with other events in the series.
 - If you create a series in Lightning Experience and edit it from Salesforce Classic, you can only edit a single event from the series. We recommend editing in Lightning Experience only.
 - You can't edit the start date of a series. Instead, delete the series and recreate it with a new start date.
 - If you edit any fields other than the following for an event series, only events repeating within the series pattern display the updated field values. Exceptions to the series and past events display the original series field values.
 - All-day event checkbox
 - Start or end time
 - Recurrence pattern
 - Recurrence start or end date
 - Location
 - A single series event can last up to 14 days unless your admin has enabled limits for event duration. In that case, you can't create an event that lasts more than 24 hours.
 - To load your calendar quickly, some series are initially projected in Salesforce and only visible on your calendar later. As a result, even after refreshing, sometimes you don't see all events from the series on your calendar immediately after saving. You can experience similar delays when deleting or editing your events. For example:
 - If you schedule a series that lasts longer than a year, you can see events that are scheduled within the next year. To see subsequent events in the series, check your calendar when those events are within a year of occurring.
 - If your admin has enabled shared activities (which lets you associate multiple contacts or one lead to your events), some events from the series can take up to two minutes to display on your calendar.
 - If you delete a series, events in the series that haven't started yet are removed.
 - To delete a single event, open the event you want to delete. Then, change the date, time, or location of that event. Save your changes. Then, open the event again and delete the event.
 - When records are merged or a lead is converted for attendees, the original record is maintained on the event series. As long as the email address is identical for the merged contacts or converted lead, no issues should occur.
 - If you have any custom fields on the event page layout or have defined default values for custom fields on the Activity object, we recommend not enabling this feature in Winter '19.
 - Editing the Assigned To field for an event series causes issues. Instead, to reassign an event series, delete the series and recreate it with the desired owner.

Financial Services Cloud: Action Plans, Salesforce Surveys, Commercial Banking, Einstein Bots, and Rollup Enhancements

Standardize customer engagement processes with Action Plans task templates. Find out what's on customers' minds with Salesforce Surveys. Give bankers a more holistic view of customers with the Commercial Banking Console Lightning app. And help customers help themselves with Einstein Bots for Financial Services Cloud. Plus, accelerate data insert and update operations with the enhanced rollup framework in Financial Services Cloud.

IN THIS SECTION:

[Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans](#)

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagements, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

[Gather Customer Insights with Salesforce Surveys](#)

Get customer feedback fast with Salesforce Surveys in Financial Services Cloud. Use a simple editor to create forms for collecting customer data. You can add a variety of question types, including a customer satisfaction score, to gather useful insights from your users and customers. Summarize and share customer feedback in reports and dashboards.

[Get a More Holistic View of Customers with Commercial Banking](#)

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

[Help Customers Help Themselves with Einstein Bots](#)

Einstein Bots for Financial Services Cloud help resolve top customer issues quickly, reducing call volume to save your company time and money.

[Enhance Rollups](#)

Speed up your Account and Financial Account data insert and update operations with the enhanced rollup framework in Financial Services Cloud. We introduced two new batch jobs. One invokes rollup recalculations, and the other assigns records to the relevant household after your data operations.

[Financial Services Cloud Has New Objects](#)

Do more with new Financial Services Cloud objects.

[New Financial Services Cloud Object Fields](#)

New fields are available on the Financial Account object.

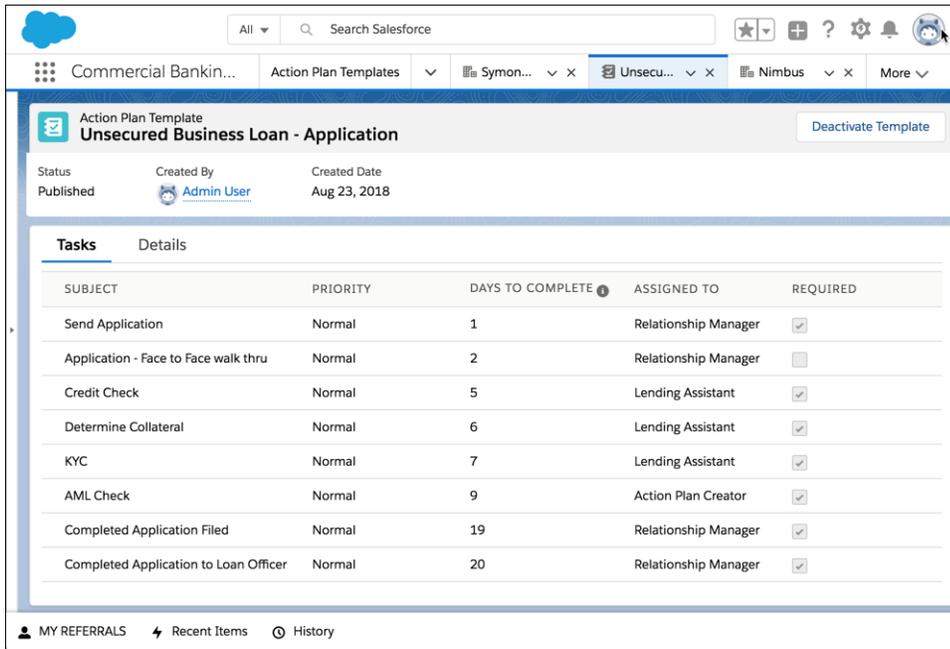
Ensure Consistency and Compliance in Customer Engagement Processes with Action Plans

Capture repeatable tasks in templates and then automate the task sequences with an action plan. Enhance collaboration and productivity by automatically assigning task owners and deadlines for specific client engagements, such as account openings, loan approvals, and claims processing. Create reports and dashboards to monitor progress and ensure compliance.

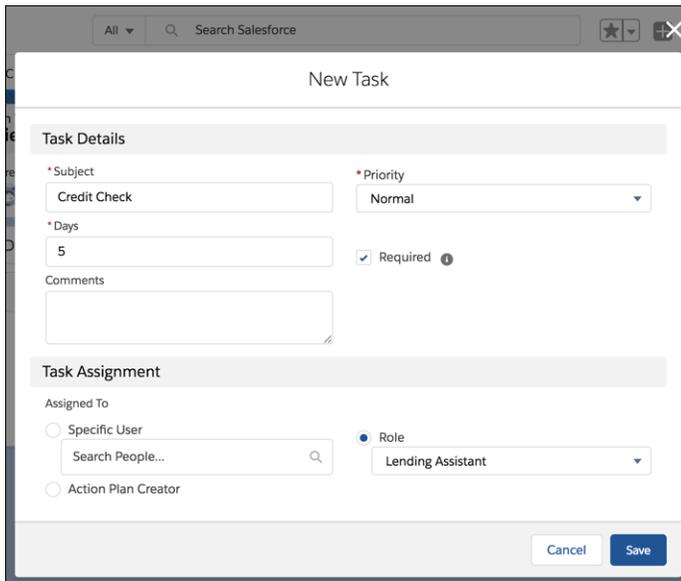
Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions that have Financial Services Cloud enabled.

How: Add the Action Plan Templates tab to the navigation bar, and update the client and account Lightning pages to include action plans.

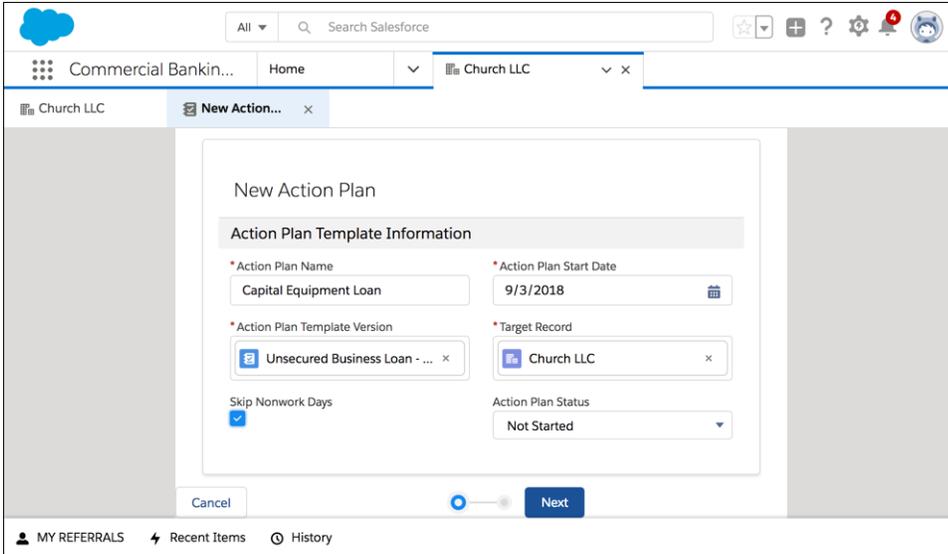
Create templates for a customer engagement process, such as a loan approval, and share with task owners.



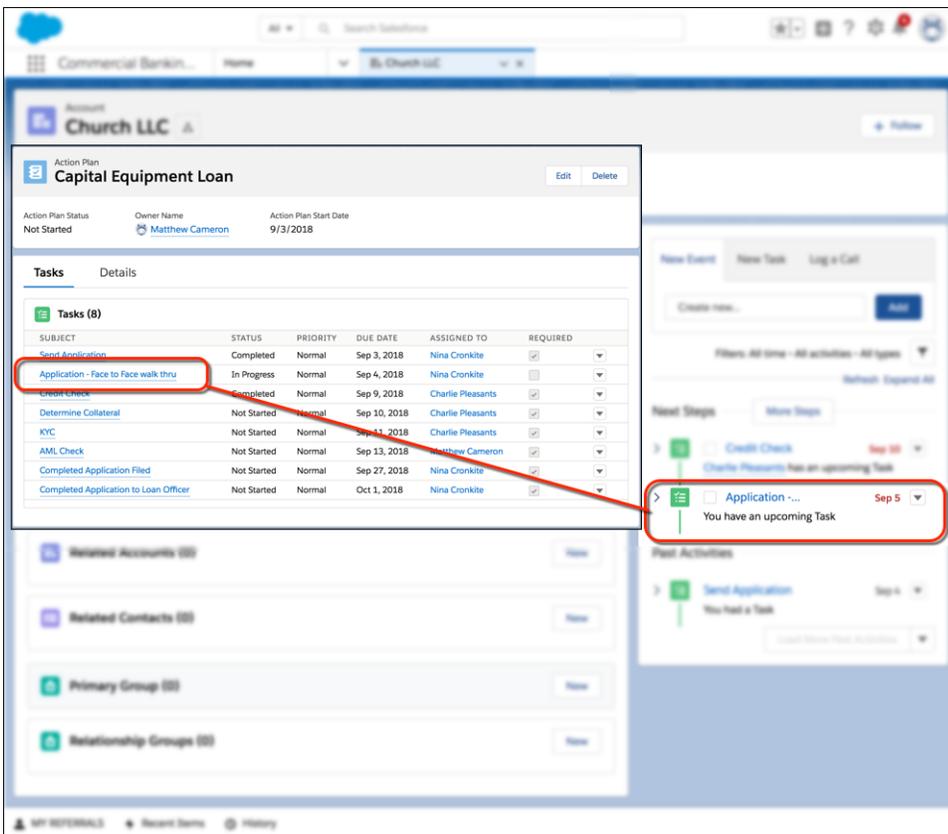
For each template task, define its priority, a date offset (the number of days to complete the task), whether it is required, and who it is assigned to the task when an action plan is created from the template.



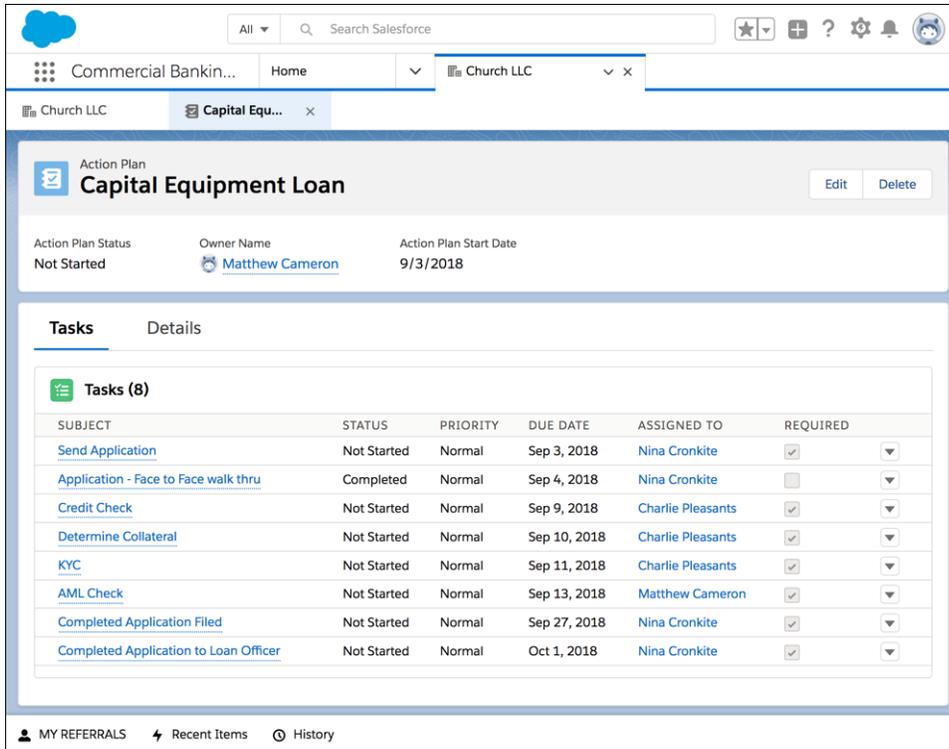
Use the action plan template to create an action plan for an account. Set the action plan's start date, and indicate whether to skip nonwork days.



Users see their assigned tasks in the task lists and views, such as the account's activity timeline. They can update the task status using the standard task interfaces or the Action Plan detail view.



Track overall progress in the action plan detail view.



The screenshot displays the Salesforce interface for an Action Plan titled "Capital Equipment Loan". The plan status is "Not Started", owned by Matthew Cameron, and started on 9/3/2018. Below the details, there is a "Tasks" section with 8 tasks listed in a table.

SUBJECT	STATUS	PRIORITY	DUE DATE	ASSIGNED TO	REQUIRED
Send Application	Not Started	Normal	Sep 3, 2018	Nina Cronkite	<input checked="" type="checkbox"/>
Application - Face to Face walk thru	Completed	Normal	Sep 4, 2018	Nina Cronkite	<input type="checkbox"/>
Credit Check	Not Started	Normal	Sep 9, 2018	Charlie Pleasants	<input checked="" type="checkbox"/>
Determine Collateral	Not Started	Normal	Sep 10, 2018	Charlie Pleasants	<input checked="" type="checkbox"/>
KYC	Not Started	Normal	Sep 11, 2018	Charlie Pleasants	<input checked="" type="checkbox"/>
AML Check	Not Started	Normal	Sep 13, 2018	Matthew Cameron	<input checked="" type="checkbox"/>
Completed Application Filed	Not Started	Normal	Sep 27, 2018	Nina Cronkite	<input checked="" type="checkbox"/>
Completed Application to Loan Officer	Not Started	Normal	Oct 1, 2018	Nina Cronkite	<input checked="" type="checkbox"/>

SEE ALSO:

[Salesforce Help: Enable Action Plans \(can be outdated or unavailable during release preview\)](#)

Gather Customer Insights with Salesforce Surveys

Get customer feedback fast with Salesforce Surveys in Financial Services Cloud. Use a simple editor to create forms for collecting customer data. You can add a variety of question types, including a customer satisfaction score, to gather useful insights from your users and customers. Summarize and share customer feedback in reports and dashboards.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: A Survey Creator license is required to create surveys. Financial Services Cloud includes five Survey Creator licenses.

How: To create surveys, assign a Survey Creator permission set to a user, and configure sharing settings for survey objects. To send surveys to your customers, create and enable a Salesforce community. Enable public access to the community, and associate the community with Salesforce Surveys in setup.

SEE ALSO:

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

Get a More Holistic View of Customers with Commercial Banking

Bankers get greater visibility into customer relationships in commercial lending, treasury management, trade finance, and more with the Commercial Banking Console app. Plus, a Business Referrals record type makes it easy for relationship managers and lending assistants to make business-to-business referrals.

Where: This feature is available in Lightning Experience and all versions of the Salesforce app in Professional, Enterprise, and Unlimited editions that have Financial Services Cloud enabled.

How: Assign a Relationship Manager profile and the relevant permissions. Update and assign the Commercial Banking page layouts.

Relationship managers review a summary of their activities on the Commercial Banking home page.

The screenshot displays the Salesforce Commercial Banking Relationship Management Dashboard. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information for Alex Kligman. The main dashboard area is divided into several sections:

- Dashboard Header:** "Relationship Management Dashboard" with a subtitle "Manage relationships with details of open opportunities, loans and mortga..." and a timestamp "As of Aug 23, 2018 7:39 PM · Viewing as Matthew Cameron".
- Pipeline of Open Op...:** A bar chart showing record counts for stages: Closed... (3), Client... (1), and Initiate... (1).
- My Loans and Mortg...:** A bar chart showing a record count of 3 for "Loan Account".
- Referrals I'm Assigned:** A bar chart showing record counts for create dates: 8/12/... (5), 8/5/2... (4), and 8/19/... (1).
- Referral Performance:** A line chart showing performance metrics: MADE 12, CONVERTED 4, REJECTED 1, OPEN 7. The x-axis shows months from Jan to Mar.
- Leads (7):** A list of leads including Parker Waugh, Lauren Smith, Shashank Shekar, Shawn Patterson, and Charlindo Ricardo, with their status and dates.
- My Top Referrers:** A section showing "Year-To-Date View · Sorted By Made" with tabs for "Internal Referrers" and "External Referrers". It lists "1. Matthew Cameron" with "2 Referrals Converted" and a count of "3".
- Referrals Assigned to Me (8):** A list of referrals with details like "Nimbus LLC Treasury Services · New · 9/10/2018" and a score of 98.
- Assistant:** A section with two cards indicating "30 days without any activity" for "Symonds Hospitality Holdings" and "TWC LLC - Debt Management Services".
- Opportunities (15):** A list of sales opportunities including "Closed Won · Aug 8, 2018" for Nimbus LLC and TWC LLC.

At the bottom, there are navigation options: "MY REFERRALS", "Recent Items", and "History".

Create business referrals to capture and track new business opportunities.

Referrals

MTD QTD YTD All Time

Referrals: 1
 Referrals Converted: 1
 Referrals Rejected: 0
 Average Membership of Converted Referrals: 0

Average Conversion Rate of Referrers: 0%

Referrals Made [New]

FULL NAME	NEW CLIENT	EXPRESSED INTEREST	STATUS	OPPORTUNITY
Jon Snow	<input type="checkbox"/>	Property Purchase	Closed - Converted	Symonds Hospitality Holdings- Property Purchase

Expressed Interests [New]

[View All](#)

Get a more focused summary on the Relationship Management Dashboard.

Relationship Management Dashboard [Refresh]

Manage relationships with details of open opportunities, loans and mortgages, and referrals

As of Aug 23, 2018 7:39 PM - Viewing as Matthew Cameron

Pipeline of Open Opportunities

Stage	Record Count
Closed Lost	3
Client Presen...	1
Initiate Trans...	1

[View Report \(Pipeline of Open Opportunities\)](#)

My Loans and Mortgages

Record Type	Record Count
Loan Account	3

[View Report \(My Loans and Mortgages\)](#)

Referrals I'm Assigned

Create Date	Record Count
8/12/2018 - ...	5
8/5/2018 - 8...	4
8/19/2018 - ...	1

[View Report \(Referrals I'm Assigned\)](#)

MY REFERRALS Recent Items History

SEE ALSO:

[Salesforce Help: Enable Commercial Banking Features \(can be outdated or unavailable during release preview\)](#)

Help Customers Help Themselves with Einstein Bots

Einstein Bots for Financial Services Cloud help resolve top customer issues quickly, reducing call volume to save your company time and money.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: An Einstein Bots license is required to use Einstein Bots in Financial Services Cloud.

Why: Improve customer service agent productivity by automating the resolution of routine customer requests in real time on digital channels like web and mobile chat. Collect and qualify customer information for seamless agent handoff. Customer service agents can review past bot activity by using case management and chat transcripts.

How: Launch Einstein Bots through a snap-in to see how chatbots can work for your customers. Perform a few simple configurations to embed the snap-in in the sample bank landing page provided with the package. You can then test-drive the bot.

To create your own chatbots, clone the unmanaged package and modify it for your specific customer conversation use cases. Retail Banking customers can access the bot from their bank's website.

SEE ALSO:

[Salesforce Help: Deploy Einstein Bots for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Test-Drive Einstein Bots for Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

Enhance Rollups

Speed up your Account and Financial Account data insert and update operations with the enhanced rollup framework in Financial Services Cloud. We introduced two new batch jobs. One invokes rollup recalculations, and the other assigns records to the relevant household after your data operations.

Where: This feature is available in Lightning Experience and all versions of the Salesforce app in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

SEE ALSO:

[Salesforce Help: Temporarily Disable Rollups to Accelerate Data Loads \(can be outdated or unavailable during release preview\)](#)

Financial Services Cloud Has New Objects

Do more with new Financial Services Cloud objects.

New Financial Services Cloud Objects

These objects are new in Financial Services Cloud.

ActionPlan

Represents the instance of an action plan, a set of tasks created from an action plan template.

ActionPlanItem

Represents the instance of an action plan item.

ActionPlanShare

Represents a sharing entry on an action plan record.

ActionPlanTemplate

Represents the instance of an action plan template.

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version.

ActionPlanTemplateItemValue

Represents the instance of an action plan, a set of tasks created from an action plan template.

ActionPlanTemplateShare

Represents a sharing entry on an action plan template record.

ActionPlanTemplateVersion

Represents the version of an action plan template.

New Financial Services Cloud Object Fields

New fields are available on the Financial Account object.

New Custom Fields on Financial Account

This object has changed.

HardwareSerial__c

The serial number of hardware associated with the account.

IncomingVolume__c

The volume of transactions coming in through the service.

OutgoingVolume__c

The volume of transactions going out through the service.

OverdraftProtection__c

Indicates whether a customer accepts overdraft protection and its associated fees.

ServiceType__c

The type of service undertaken.

TargetLimit__c

The limit on items or value that the service processes.

Health Cloud: Utilization Management, Health Insurance Data Model, More Usability Enhancements

Health Cloud now supports seamless collaboration among healthcare providers and payers. Providers can submit and track requests for authorization, and payers can process requests to make sure patients get the right care, at the right time, in the right place. And we've added new Lightning components to make it easier to build your own custom record pages for your users.

IN THIS SECTION:

[Deliver More Personalized and Appropriate Care with Utilization Management](#)

Health Cloud streamlines utilization management processes so that healthcare providers and payers can collaborate seamlessly on case reviews. With utilization management, you can help provide consumers with the right care in the right place at the right time.

[Unify Membership, Benefits, and Preauthorizations with the Health Insurance Data Model](#)

Health Cloud now includes an industry-specific data model that makes systems of record—including membership, benefits, and authorizations—available in a single console. Payers and providers can work more efficiently and better understand their members' and patients' needs.

[Access External Insurance Claims Data](#)

The claims data model uses the power of Salesforce Lightning Connect to make externally sourced insurance claims data available in Health Cloud. Give your users access to claims information so that they can quickly and efficiently answer queries from providers and members without using multiple screens or applications.

[Be More Efficient with Patient Card Usability Improvements](#)

You can now open a record page in a subtab directly from the patient card by clicking a link. External URLs open in a new browser tab. Phone fields follow your CTI configuration. When a patient card contains 10 or more records, you can click **Show More** to view another 25 records. And the patient card can now render images from formula fields.

[Health Cloud Has Reached the Finnish Line](#)

Now that we've "finished" localizing Health Cloud into Finnish, our friends in Suomi can get started implementing and using Health Cloud in their own language. Suomi on mahtava! (Finland is awesome!)

[Protect Health Cloud Data with Platform Encryption](#)

If you work with patient data, we know you're careful about keeping that data safe. When you use Platform Encryption, you can add an extra layer of protection to patient data stored in a wide range of fields and objects in the Health Insurance and Utilization Management data models. Both data models are generally available in Spring '18.

[New Health Cloud Objects](#)

These new standard objects support the health insurance and utilization management data models.

[Changed Health Cloud Object](#)

To support the Health Insurance data model, we've added custom fields to the Account object.

[New and Changed Health Cloud Lightning Components](#)

We added two Lightning components to support utilization management, and enhanced the patient card and timeline components.

Deliver More Personalized and Appropriate Care with Utilization Management

Health Cloud streamlines utilization management processes so that healthcare providers and payers can collaborate seamlessly on case reviews. With utilization management, you can help provide consumers with the right care in the right place at the right time.

Where: The utilization management user interface is available only in Lightning Experience. You can set up and configure utilization management in either Lightning Experience or Salesforce Classic. This feature is available in orgs where Health Cloud is enabled.

When: Utilization Management features are made available through the new Health Cloud Platform permission set license. This permission set license is provisioned to all Health Cloud customers, based on their contracts, after the end of the Winter '19 Production release upgrade. Once the Health Cloud Platform permission set license is provisioned to production orgs, you can replicate a new sandbox org and have access to Utilization Management.

Who: Users must have Health Cloud and the Health Cloud Platform permission set license assigned to them. Also, users need these permission sets: Health Cloud Permission Set License and Health Cloud Utilization Management.

Why: If your organization is a healthcare payer, such as an insurance company or health plan, processing and assigning requests is simpler and faster. It's easier to gather patient and clinical data from the provider and coordinate the review of care requests from clinicians to medical directors.

For healthcare providers, utilization management makes it easy to submit care requests quickly with fewer phone calls and faxes for preauthorizations.

How: Health Cloud provides new standard objects to support a customizable set of requests:

- Prescription drug preauthorization requests.
- Service preauthorization requests

- Admission cases
- Concurrent (continued stay) reviews
- Appeals
- Complaints and grievances

SEE ALSO:

[New Health Cloud Objects](#)

Unify Membership, Benefits, and Preauthorizations with the Health Insurance Data Model

Health Cloud now includes an industry-specific data model that makes systems of record—including membership, benefits, and authorizations—available in a single console. Payers and providers can work more efficiently and better understand their members' and patients' needs.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Health Cloud is enabled.

When: The Health Insurance data model features are made available through the new Health Cloud Platform permission set license. This permission set license is provisioned to all Health Cloud customers, based on their contracts, after the end of the Winter '19 Production release upgrade. Once the Health Cloud Platform permission set license is provisioned to production orgs, you can replicate a new sandbox org and have access to the Health Insurance data model.

Why: You can manage patients' financial relationships, such as who they work for, which insurance they have, and the dependents included on their health plan. You can manage details of the plan benefits to members and members' preauthorization requests for treatment.

The health insurance data model includes these parts:

- Membership
- Benefits
- Preauthorization

The health insurance data model includes standard objects and record types on standard objects.

Who: Users must have Health Cloud and the Health Cloud Platform permission set license assigned to them. Also, users need these permission sets: Health Cloud Permission Set License and Health Cloud Member Services.

How: You must have the Health Cloud managed package installed in your org to enable the Health Cloud insurance data model. In Lightning Experience, open **Object Manager** in Setup, and select the desired object.

SEE ALSO:

[New Health Cloud Objects](#)

Access External Insurance Claims Data

The claims data model uses the power of Salesforce Lightning Connect to make externally sourced insurance claims data available in Health Cloud. Give your users access to claims information so that they can quickly and efficiently answer queries from providers and members without using multiple screens or applications.

Where: This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Health Cloud is enabled. In addition, you must also have Salesforce Lightning Connect licensed in your org.

When: The claims data model is available through an unmanaged package after the Winter '19 Production release upgrade.

Who: Users must have Health Cloud and the Health Cloud Platform permission set license assigned to them. Users also need these permission sets: Health Cloud Permission Set License and Health Cloud Member Services.

Why: Whether you're dealing with member services or care management, you want your users to have instant access to information that they need. The claims data model represents important data from your external claims processing system that you can make available to call center agents and other users.

The claims data model includes these external objects.

- Claim Header—Represents summary information about the claim, such as the payment amount, specified medications, claim date, and insurance plan.
- Claim Line—Represents a line item in a claim record.
- Claim Diagnosis—Represents the clinical diagnosis for which the service, equipment, or medication was provided.
- Claim Diagnosis Procedure—Represents a diagnosis associated with a clinical procedure in a claim line.
- Claim Provider—Represents information about the different providers on the claim, such as the billing provider or the rendering provider.

How: You must have the Health Cloud managed package installed in your org to enable the Health Cloud claims data model. In Lightning Experience, from Setup, enter *External Objects* in the Quick Find box, then select **External Objects**.

Be More Efficient with Patient Card Usability Improvements

You can now open a record page in a subtab directly from the patient card by clicking a link. External URLs open in a new browser tab. Phone fields follow your CTI configuration. When a patient card contains 10 or more records, you can click **Show More** to view another 25 records. And the patient card can now render images from formula fields.

Where: These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Performance, and Unlimited editions.

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Protect Health Cloud Data with Platform Encryption

If you work with patient data, we know you're careful about keeping that data safe. When you use Platform Encryption, you can add an extra layer of protection to patient data stored in a wide range of fields and objects in the Health Insurance and Utilization Management data models. Both data models are generally available in Spring '18.

Where: These changes apply to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Performance, and Unlimited editions.

Why: You can now encrypt these fields.

Care Request

- Member First Name
- Member Last Name
- Member Identification Number
- Member Group Number
- Facility Record Number
- Admission Notes
- First Reviewer Notes
- Medical Director Notes
- Resolution Notes
- Root Cause Notes
- Disposition Notes

Care Request Drug

- Prescription Number

Coverage Benefit

- Copay Notes
- Deductible Notes
- Coinsurance Notes
- Out-of-Pocket Notes
- Lifetime Maximum Notes
- Benefit Notes
- Source System Identifier

Coverage Benefit Item

- Service Type Code
- Service Type
- Notes
- Coverage Level
- Source System Identifier

Member Plan

- Member Number
- Group Number
- Issuer Number
- Affiliation
- Primary Care Physician

- Source System Identifier

Purchaser Plan

- Plan Number
- Service Type
- Source System
- Source System Identifier

Purchaser Plan Association

- Purchaser Plan Association ID
- Status
- Source System
- Source System Identifier

 **Note:** Deterministic encryption is not available for long text fields. This includes any field with “Notes” in its name.

SEE ALSO:

[Shield Platform Encryption: More Fields to Encrypt and More API Support, New Cache-Only Key Service](#)

[Salesforce Help: Encryptable Fields](#)

[Welcome Shield Platform Encryption to Health Cloud](#)

New Health Cloud Objects

These new standard objects support the health insurance and utilization management data models.

Where: Available in Enterprise, Performance, and Unlimited editions.

Who: To access the objects, admins must install the Health Cloud managed package and assign the Health Cloud Permission Set License and the Health Cloud Platform permission set licenses to users.

CareDiagnosis

Represents the details of a diagnosis, including code type, name, and description. You can associate one or more care diagnoses with a care request.

CarePreauth

Represents the details of a preauthorization for care under a member’s plan.

CarePreauthItem

Represents the details of items included in a preauthorization for care under a member’s plan.

CareRequest

Represents the general details of a care-related request, including member information, admission date, and decision reason. A single request can contain multiple diagnoses, services, or drugs. Care requests include preauthorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

CareRequestConfiguration

Represents the details for a record type, such as service request, drug request, or admission request. You can associate one or more record types with a care request.

CareRequestDrug

Represents the details of a requested drug, including name, strength, frequency, and instructions for administration. You can associate one or more drug requests with a care request.

CareRequestItem

Represents the details of a care service request, including name, modifiers, and the effective date.

CoverageBenefit

Represents the benefits provided to a covered member by a purchaser's plan.

CoverageBenefitItem

Represents the benefit items provided to a covered member by a purchaser's plan.

MemberPlan

Represents details about the insurance coverage for a member or subscriber.

PurchaserPlan

Represents the pay plan that a purchaser makes available to its members and members' dependents.

PurchaserPlanAssn

Represents the plans that a purchaser offers to its members.

PlanBenefit

Represents the standard benefits available under a purchaser's plan offered to its members.

PlanBenefitItem

Represents the details of a benefit available under a purchaser's plan offered to its members.

SEE ALSO:

[Unify Membership, Benefits, and Preauthorizations with the Health Insurance Data Model](#)

[Deliver More Personalized and Appropriate Care with Utilization Management](#)

[Health Cloud Admin Guide: Configure Care Requests](#)

[Health Cloud User Guide: Submit a Care Request](#)

[Health Cloud User Guide: Approve or Deny Care](#)

Changed Health Cloud Object

To support the Health Insurance data model, we've added custom fields to the Account object.

Where: Available in Enterprise, Performance, and Unlimited editions. The custom fields are available when you install the Health Cloud managed package.

Who: To access the custom fields, admins must install the Health Cloud managed package and assign the Health Cloud Permission Set License and the Health Cloud Platform permission set licenses to users.

We added the following fields to the Account object:

PayerType__c

Description of the type of payer.

TaxID__c

The payer's tax ID number.

SourceSystem__c

The name of the system from which the payer's details are sourced.

New and Changed Health Cloud Lightning Components

We added two Lightning components to support utilization management, and enhanced the patient card and timeline components.

Where: Available in Enterprise, Performance, and Unlimited editions.

New Utilization Management Components

Create Care Request

Enables users to create and submit a request for utilization management review. You can have any number of Create Care Request components on any Lightning page. You can configure each Create Care Request component to create a request of one of these types:

- Admission
- Appeal
- Complaint
- Concurrent Review
- Drug Request
- Grievance
- Service Request

To get set up faster, install the Health Cloud Care Request Extensions unmanaged package. It contains an app with the record types, page layouts, and other metadata to support utilization management.

Care Request Details

Provides information about the associated objects on Case record pages. You can display data from the Care Request, Care Request Item, Care Request Drug, and Care Request Diagnosis objects.

New Patient Information Components

The Patient Card has been broken up into components that you can use separately to build record detail pages in Lightning App Builder. These are the new components:

Patient Timeline for Health Cloud

Enables users to display a patient's healthcare events and activities in chronological order. Can be used on any page where the object has a lookup to Account.

Care Plan Tasks

Enables users to create and manage activities related to a care plan. You can use it on any Case record page.

Care Team Map

Displays a graphical view of the relationships among care team members. You can use it on any Case record page.

Care Team List

Provides a list of care team members. You can use it on any Case record page.

Care Gaps

Enables users to surface gaps in a patient's care. You can use it on any Case record page.

Changed Components

The existing Patient Card for Health Cloud component can now be used on any Lightning Experience record detail page where the object has a lookup to Account.

SEE ALSO:

[Health Cloud Admin Guide: Configure Care Requests](#)

[Health Cloud User Guide: Submit a Care Request](#)

[Health Cloud User Guide: Approve or Deny Care](#)

Customization: Einstein Next Best Action Pilot and Enhancements to Lightning App Builder and Lightning Flow

Continue making your org smarter with the Einstein Next Best Action pilot. Make your Lightning pages more dynamic and more useful with a new component visibility rule parameter and new components. Beef up your flows with a host of new screen components, expanded limits, and the ability to deploy flows and processes as active.

IN THIS SECTION:

[Einstein Next Best Action: Recommend Actions and Offers Using Strategies \(Pilot\)](#)

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 service agents have multiple ways to assist customers, and you want to guide the agent to the most appropriate action. Consider using Einstein Next Best Action.

[Predict What's Next in Your Business with Einstein Prediction Builder \(Beta\)](#)

Einstein Prediction Builder continues its beta program in this maintenance release. When you buy Einstein Analytics Plus or Einstein Predictions, you get Einstein Prediction Builder for free.

[Lightning App Builder: Component Visibility Rule Enhancements, Managed App Editing, and New Components](#)

Get increased control over who sees which components using visibility rules based on standard and custom user permissions. Edit managed apps inside the Lightning App Builder. Augment your Lightning pages with new components.

[Lightning Flow: Screen Components Galore, CI/CD Support, Stretching the Limits](#)

Add more functionality to your flow screens with seven new screen components. If your org deploys changes using a continuous integration and continuous deployment model, you can now deploy processes and flows as active. We also made it easier to track process and flow test coverage. Don't let default per-org limits stop you from automating business processes. By default, you now get more total processes and flows, active processes and flows, and paused or waiting flow interviews.

[Data Protection and Privacy: Consent Preferences Using REST API, Community User Access to Data Privacy Records](#)

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.

AppExchange: Personalized Recommendations and Search Filters

Find the AppExchange solutions that interest you with the new Recommended for You section. Get personalized solution recommendations based on your past searches, installs, and other aspects of your AppExchange experience. Use search filters to hone in on solutions that match your business requirements.

General Setup: Custom Field Management Improvement (Pilot), Import and Integration Tools in Setup, Approval Requests to Queues

View where a custom field is referenced, such as a formula, layout, or report with the Where Is This Used? button (Pilot). The new Integrations page in Setup is your one-stop shop for import and integration tools. View your approval requests in queues no matter which Salesforce experience you're using.

Einstein Next Best Action: Recommend Actions and Offers Using Strategies (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 service agents have multiple ways to assist customers, and you want to guide the agent to the most appropriate action. Consider using Einstein Next Best Action.

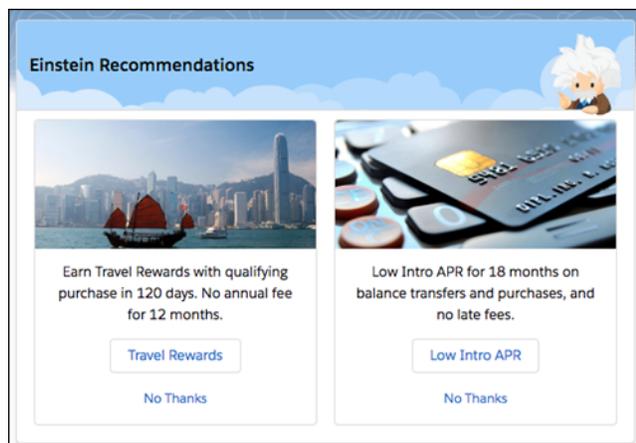
Where: This feature applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

 **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: To manage the propositions that you present, users require the Manage All Data or Manage Next Best Action Propositions permission. To manage strategies, users require the Manage All Data or Manage Next Best Action Recommendation Strategies permission.

Why: For example, when an agent opens a contact record, the Einstein Next Best Action component runs a strategy that refines the set of propositions. The strategy produces two recommendations for this contact.

- The first offer is recommended because the customer is an existing loan customer, and the card offer is deemed an appropriate upsell.
- The second offer is recommended because the customer's credit score is above a certain threshold.



How: Create propositions that represent your custom offers and actions. When a user accepts a recommendation, a screen flow launches. Build recommendation strategies that query data, make decisions, and filter or sort your propositions.

To display recommendations from your strategy, use the Lightning Application Builder, and add the Einstein Next Best Action component to a Lightning record page. Or using the Community Builder, add the Suggested Actions component to a Lightning community page. For Visualforce pages, use Lightning Out to add the lightning:nextBestAction component.

Related Updates for Developers

Lightning Components

Changed component: [lightning:nextBestActions](#)

Chatter REST API

[New and changed resources](#): Execute a strategy

Chatter in Apex

[New and changed methods](#): Execute a strategy

Predict What's Next in Your Business with Einstein Prediction Builder (Beta)

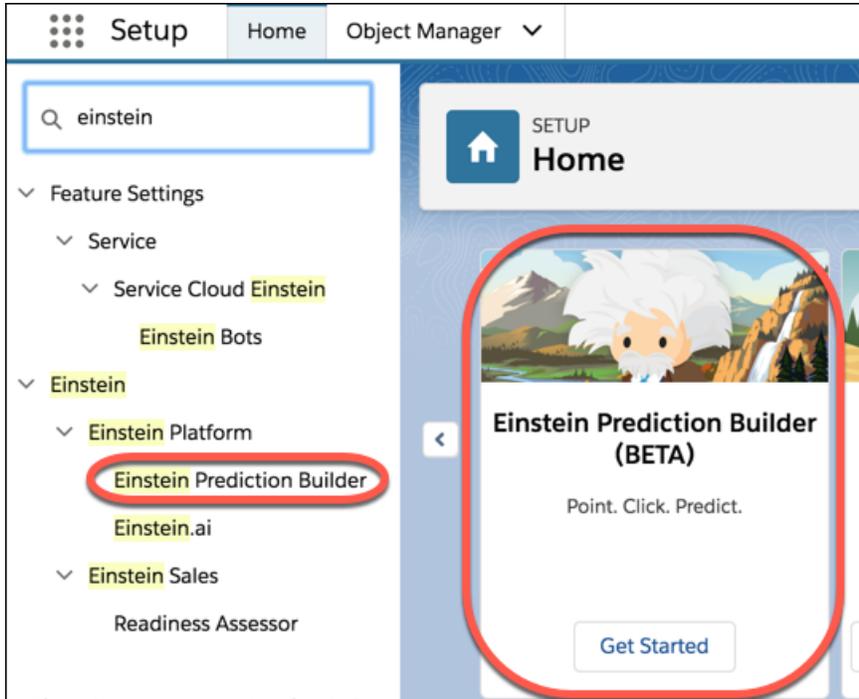
Einstein Prediction Builder continues its beta program in this maintenance release. When you buy Einstein Analytics Plus or Einstein Predictions, you get Einstein Prediction Builder for free.

Who: This feature is available to admins with the Einstein Analytics Plus, or Einstein Predictions license.

Where: Einstein Prediction Builder is available in Lightning Experience in Enterprise edition.

 **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.



Once you've set up Einstein Prediction Builder and built a prediction, users in both Lightning Experience and Salesforce Classic can view predicted field values on records.

SEE ALSO:

[Salesforce Einstein: Custom Fields in Forecasting, Automated Flows for Bots, Faster Data Visualization, and Enhanced Image Detection](#)

Lightning App Builder: Component Visibility Rule Enhancements, Managed App Editing, and New Components

Get increased control over who sees which components using visibility rules based on standard and custom user permissions. Edit managed apps inside the Lightning App Builder. Augment your Lightning pages with new components.

IN THIS SECTION:

[Set Component Visibility Based on Standard and Custom User Permissions](#)

Now you can make your Lightning pages more dynamic by configuring component visibility filters based on the permissions of the person viewing the page. For example, you can create a rule for a component to display for users with a specific permission, but it's hidden for everyone else. Component visibility filters are supported for standard components, custom components, and components from AppExchange.

[Edit Managed Apps with the Lightning App Builder](#)

Apps installed from a managed package no longer use the Edit App wizard to customize their settings. Instead, select **Edit** in the App Manager for a managed Lightning app, and make your changes using the Lightning App Builder.

[Suggest Actions and Offers to Your Lightning Experience Users \(Pilot\)](#)

Direct your users to the best next step with the Einstein Next Best Action component. This component applies a strategy that refines your propositions and recommends actions or offers, like an upgrade, a discount, or a service. You define the strategy with the conditions and rules that determine which propositions to display to your users. This component is available as part of the Einstein Next Best Action pilot.

[Add the Text Shortcuts Component for Email Application Panes](#)

Save your sales reps time when they compose emails with the same phrases. Reps using Outlook integration with Inbox and Inbox Beta for Gmail can save the phrases they use the most and quickly add them to an email.

[Updated Labels in the App Creation Wizard and the Lightning App Builder](#)

We admit it. We're sticklers for label accuracy and style. To make them clearer and more symmetrical, we revised a few of the tab labels and headings that you see in the Lightning app creation wizard and in the App Settings section of the Lightning App Builder.

[Better Labels for Form Factors in Component Visibility Rules](#)

Previously, the values for form factors in component visibility rules were Small, Medium, and Large. To make it easier to understand which type of device the filter applies to, these labels have been updated to Phone, Tablet, and Desktop. We also changed the Form Factor field value to Device.

[Show Users Salesforce IoT Data with the IoT Insights Lightning Component](#)

Add the IoT Insights component to any Lightning record page, such as cases, work orders, and assets, to show users Salesforce IoT data throughout Salesforce.

[Lightning Components No Longer Auto-Added to Pages](#)

Previously, if you clicked a component in the Lightning App Builder palette when nothing was selected on the canvas, the component was added to the page's first empty region. Now, before you add a component to a page by clicking it in the palette, you must select an insertion point on the canvas ()

Set Component Visibility Based on Standard and Custom User Permissions

Now you can make your Lightning pages more dynamic by configuring component visibility filters based on the permissions of the person viewing the page. For example, you can create a rule for a component to display for users with a specific permission, but it's hidden for everyone else. Component visibility filters are supported for standard components, custom components, and components from AppExchange.

Where: This change applies to components on record, Home, and app pages in Lightning Experience in the Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: If you don't define a filter, the component displays on the Lightning page as usual. When you define one or more filters and set the filter logic for a component, the component is hidden until the filter logic criteria are met.

Edit Managed Apps with the Lightning App Builder

Apps installed from a managed package no longer use the Edit App wizard to customize their settings. Instead, select **Edit** in the App Manager for a managed Lightning app, and make your changes using the Lightning App Builder.

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

Suggest Actions and Offers to Your Lightning Experience Users (Pilot)

Direct your users to the best next step with the Einstein Next Best Action component. This component applies a strategy that refines your propositions and recommends actions or offers, like an upgrade, a discount, or a service. You define the strategy with the conditions and rules that determine which propositions to display to your users. This component is available as part of the Einstein Next Best Action pilot.

Where: This feature 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 accepts a suggestion, a screen flow launches. To run a flow, your users must have either the Run Flow permission or the Flow User field enabled on the user detail page.

Add the Text Shortcuts Component for Email Application Panes

Save your sales reps time when they compose emails with the same phrases. Reps using Outlook integration with Inbox and Inbox Beta for Gmail can save the phrases they use the most and quickly add them to an email.

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

Who: Companies with Inbox enabled can add the Text Shortcuts component to their email application panes.

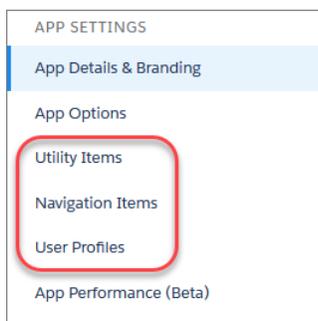
Updated Labels in the App Creation Wizard and the Lightning App Builder

We admit it. We're sticklers for label accuracy and style. To make them clearer and more symmetrical, we revised a few of the tab labels and headings that you see in the Lightning app creation wizard and in the App Settings section of the Lightning App Builder.

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

How: Here's what changed.

Previous Label	New Label
Select Utility Items	Utility Items
Select Items	Navigation Items
Assign to User Profiles	User Profiles



Better Labels for Form Factors in Component Visibility Rules

Previously, the values for form factors in component visibility rules were Small, Medium, and Large. To make it easier to understand which type of device the filter applies to, these labels have been updated to Phone, Tablet, and Desktop. We also changed the Form Factor field value to Device.

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Show Users Salesforce IoT Data with the IoT Insights Lightning Component

Add the IoT Insights component to any Lightning record page, such as cases, work orders, and assets, to show users Salesforce IoT data throughout Salesforce.

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

SEE ALSO:

[Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights](#)

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

Lightning Flow: Screen Components Galore, CI/CD Support, Stretching the Limits

Add more functionality to your flow screens with seven new screen components. If your org deploys changes using a continuous integration and continuous deployment model, you can now deploy processes and flows as active. We also made it easier to track process and flow test coverage. Don't let default per-org limits stop you from automating business processes. By default, you now get more total processes and flows, active processes and flows, and paused or waiting flow interviews.

IN THIS SECTION:

[Automate More Business Processes with Increased Per-Org Limits](#)

The default limits for total processes and flows, active processes and flows, and groups of scheduled actions or flow interviews that are waiting to be processed has increased.

[Monitor Your Processes and Flows with New Usage-Based Entitlements](#)

You can now see usage-based entitlements for usage of flow interviews in your org.

[Process and Flow Design: New Out-of-the-Box Screen Components, Validation for Custom Screen Components](#)

Build flashier screens more quickly with new screen components. Developers can validate custom screen components when users move to another screen.

[Flow Distribution: Recommended Flows, Flows in Einstein Bots, CI/CD Support](#)

We're supporting several new ways to put your flows to work. You can recommend screen flows to the right users at the right moment with the Einstein Next Best Action pilot. Or let users choose which flow to start from the Guided Action List in standard navigation apps. Autolaunched flows are now supported in Einstein bot dialogs. For those of you deploying flows between Salesforce environments, we added support for continuous integration and continuous deployment practices.

[Track Process and Flow Test Coverage](#)

If your org uses Apex tests to validate processes and autolaunched flows, you're probably interested in knowing what your flow test coverage is. We're introducing two Tooling API objects that you can query to calculate test coverage for processes and autolaunched flows.

Automate More Business Processes with Increased Per-Org Limits

The default limits for total processes and flows, active processes and flows, and groups of scheduled actions or flow interviews that are waiting to be processed has increased.

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

Why: We increased three per-org limits. The total processes and flows limit and the active processes and flows limit are per-org limits for each process or flow type. For example, your org can have up to 4,000 screen flows and up to 4,000 invocable processes. Previously, the limits covered all process and flow types per org.

Per-Org Limit	Summer '18 and Earlier	Winter '19
Total processes and flows	1,000	4,000 per process or flow type
Active processes and flows	500	2,000 per process or flow type
Groups of scheduled actions or flow interviews that are waiting to be processed	30,000	50,000

SEE ALSO:

[Salesforce Help: Flow Types](#)

Monitor Your Processes and Flows with New Usage-Based Entitlements

You can now see usage-based entitlements for usage of flow interviews in your org.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. For extra flow interviews and paused or waiting flow interviews in Enterprise, Performance, and Unlimited editions, contact your Salesforce account executive.

How: From Setup, enter *Company* in the Quick Find box, then select **Company Information**. Your monthly usage of flow interviews and paused and waiting flow interviews appears in the Usage-based Entitlements related list.

 **Important:** Usage-based entitlements for processes and flows are not immediately available to orgs. After an org is provisioned with the entitlements, you can start to monitor monthly usage. This per-org feature enablement is occurring throughout the release.

Per-Org Usage-Based Entitlement	Essentials and Professional Editions	Enterprise, Performance, Unlimited, and Developer Editions
Maximum Paused and Waiting Flow Interviews	30,000	50,000
Maximum Flow Interviews with UI per Month	2,000	20,000
Maximum Flow Interviews Without UI per Month	10,000,000	100,000,000

Process and Flow Design: New Out-of-the-Box Screen Components, Validation for Custom Screen Components

Build flashier screens more quickly with new screen components. Developers can validate custom screen components when users move to another screen.

IN THIS SECTION:

[Flow Screen Components: More Input Types and Dependent Picklists](#)

New screen components expand your options when requesting data from your users via flow screens. You can capture more specific types of inputs, like email addresses, names, and phone numbers, and take advantage of your org's field dependencies to display dependent picklists.

[Remember Previously Entered Values in Flow Screen Components](#)

By default, screen components have no memory. If a user enters a value, navigates to another screen, and returns to the component's screen, the user-entered value is lost. Now flows remember the value for each attribute that you configure in both Inputs and Outputs tabs of the screen component.

[Avoid Creating Multiple Record-Change Processes for an Object](#)

When you select the object for a new record-change process, Process Builder displays a list of active record-change processes associated with that object.

[Add Validation Functions to Custom Screen Components](#)

You can now add custom validation to your custom screen components.

[Extend Flows with Third-Party Systems and Apps Using Flow Solutions on AppExchange](#)

Discover a growing collection of partner-built flow actions that can save you the time and effort of building your own third-party integrations. Examples of available flow actions include accepting credit card payments, conducting credit checks, and weather forecasts. If you're a consulting partner or ISV, you can share your flow solutions on the Salesforce AppExchange.

SEE ALSO:

[Use PATCH in Your External Service Schema](#)

Flow Screen Components: More Input Types and Dependent Picklists

New screen components expand your options when requesting data from your users via flow screens. You can capture more specific types of inputs, like email addresses, names, and phone numbers, and take advantage of your org's field dependencies to display dependent picklists.

IN THIS SECTION:

[Display Dependent Picklists in Flow Screens](#)

Add dependent picklists to your flow screens with just a few clicks. The new Dependent Picklist screen component takes advantage of the field dependencies that you've already defined in your org.

[Capture Names in Flow Screens](#)

It's easier to capture a name in a flow screen. The new Name screen component generates a name form with up to six different fields.

[Let Flow Users Opt In with a Toggle](#)

Bored of traditional checkboxes in your flow screens? Capture yes/no, on/off, or true/false values with the new Toggle screen component.

[Let Flow Users Select a Number Value with a Slider](#)

Need to capture a number value in a flow screen? Try out the new Slider screen component. With Slider, you can configure the range of valid values, and the user enjoys a better visualization.

[Capture and Validate Email Addresses in Flow Screens](#)

Easily capture email addresses in flow screens by using the new Email screen component in the Cloud Flow Designer. The component verifies that each entered value is a valid email address.

[Capture Phone Numbers in Flow Screens](#)

Easily capture phone numbers in flow screens by using the new Phone screen component in the Cloud Flow Designer.

[Capture URLs in Flow Screens](#)

Easily capture URLs in flow screens by using the new URL screen component in the Cloud Flow Designer.

Display Dependent Picklists in Flow Screens

Add dependent picklists to your flow screens with just a few clicks. The new Dependent Picklist screen component takes advantage of the field dependencies that you've already defined in your org.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:dependentPicklists**, and use the Inputs tab to configure which picklist fields from your org to use.

For example, a field dependency is defined between the Dessert and Flavor picklists on a custom object. To display the picklists in a flow screen, you configure a Dependent Picklists component. The component uses the field dependency to restrict the options for Flavor based on what the user selects for Dessert.

 **Note:** With this component, you don't have to stop at two levels. You can display three picklists. The second picklist depends on the first picklist, and the third picklist depends on the second picklist.

Capture Names in Flow Screens

It's easier to capture a name in a flow screen. The new Name screen component generates a name form with up to six different fields.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:name**. Use the Inputs tab to configure the heading that appears above the group of name fields and which name fields to display.

Let Flow Users Opt In with a Toggle

Bored of traditional checkboxes in your flow screens? Capture yes/no, on/off, or true/false values with the new Toggle screen component.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:toggle**, and use the Inputs tab to configure the toggle's labels.

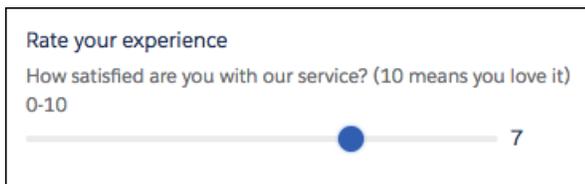


Let Flow Users Select a Number Value with a Slider

Need to capture a number value in a flow screen? Try out the new Slider screen component. With Slider, you can configure the range of valid values, and the user enjoys a better visualization.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:slider**, and use the Inputs tab to configure the slider's label and range.



Capture and Validate Email Addresses in Flow Screens

Easily capture email addresses in flow screens by using the new Email screen component in the Cloud Flow Designer. The component verifies that each entered value is a valid email address.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:email**, and use the Inputs tab to configure the email field's label, default value, and placeholder text.



Capture Phone Numbers in Flow Screens

Easily capture phone numbers in flow screens by using the new Phone screen component in the Cloud Flow Designer.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:phone**, and use the Inputs tab to configure the phone field's label, placeholder text, and the pattern for valid values.



Cell Phone
(555) 555-5555

Capture URLs in Flow Screens

Easily capture URLs in flow screens by using the new URL screen component in the Cloud Flow Designer.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: In a Screen element, add a Lightning Component field. For Lightning Component, select **flowruntime:url**, and use the Inputs tab to configure the URL field's label, default value, and the pattern for valid values.



Vanity URL
http://

Remember Previously Entered Values in Flow Screen Components

By default, screen components have no memory. If a user enters a value, navigates to another screen, and returns to the component's screen, the user-entered value is lost. Now flows remember the value for each attribute that you configure in both Inputs and Outputs tabs of the screen component.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in [Lightning flow runtime](#).

How: To retain the value of an attribute while a user moves between screens, add the attribute to both the Inputs and Outputs tabs in the screen component.



Example: Suppose that you use the Email screen component in an email address confirmation screen. In the Email component, the Value attribute represents the email address. Configure the Inputs tab to set the Value attribute to the value of the `{!existingEmail}` variable, which is set earlier in the flow to the user's email address. Configure the Outputs tab to map the Value attribute to the `{!confirmedEmail}` variable.

The image shows two side-by-side screenshots of the Lightning Flow configuration interface. The left screenshot is the 'Inputs' tab, titled 'Set the component attributes using values from your flow.' It contains a table with columns 'Attribute' and 'Value'. The first row has 'Label' as the attribute and 'Confirm your email' as the value. The second row has 'Value' as the attribute and '{!existingEmail}' as the value. There are information icons and a trash icon next to each value. An 'Add Row' button is at the bottom. The right screenshot is the 'Outputs' tab, titled 'Set flow variables using attributes from your component.' It contains a table with columns 'Attribute' and 'Variable'. The first row has 'Value' as the attribute and '{!confirmedEmail}' as the variable. There are information icons and a trash icon next to each variable. An 'Add Row' button is at the bottom.

When Madison Rigsby runs the flow and sees the email confirmation screen, the Value attribute is already set to `mrigsby@salesforce.com` per the Inputs tab setting.

Madison changes that value to `madison.rigsby@salesforce.com` and clicks **Next**. When Madison clicks **Previous** to return to the email confirmation screen, she sees the email address value as `madison.rigsby@salesforce.com`.

Avoid Creating Multiple Record-Change Processes for an Object

When you select the object for a new record-change process, Process Builder displays a list of active record-change processes associated with that object.

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

Why: We recommend restricting your org to one record-change process per object. The more record-change processes that are associated with an object, the more likely your org is to exceed limits, such as SOQL queries. In addition, if you create multiple record-change processes for an object, Salesforce can't guarantee which process is evaluated first or second or seventh.

Whenever you see this list of processes in the Object node, consider adding to an existing process instead of creating another one. We recommend automating everything in one process per object, whenever possible.

The screenshot shows the 'Object' dropdown menu in Process Builder. The selected object is 'Opportunity'. Below the dropdown, there is a warning icon and the text 'Opportunity already has active record-change processes' with '1 item' below it. A table below the warning lists the existing process:

PROCESS	MANAGED
Opportunity Management	

Add Validation Functions to Custom Screen Components

You can now add custom validation to your custom screen components.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Screen components are supported only in Lightning runtime.

How: To provide validation support for a custom screen component, add a `validate` attribute of type `Aura.Action` to your component's declarations. Use a controller `init` method to set the `validate` attribute to a function that carries out a validation determination. The function runs when the flow user clicks **Next** or when a component runs the `navigate` function. The validation

function must return two parameters: `isValid` and `errorMessage`. If `isValid` is set to `false`, the attempt to proceed is canceled, and the value of `errorMessage` is displayed.

Here's an example of how to implement validation support.

```
<aura:component implements="lightning:availableForFlowScreens" access="global">
  <!--When the component renders, it calls init handler.-->
  <aura:handler name="init" value="{!this}" action="{!c.init}"/>

  <!--Declare the validation attribute so it can store the validation logic.-->
  <aura:attribute name="validate" type="Aura.Action"/>

  <!-- component markup -->
</aura:component>
```

```
{
  init: function(cmp, event, helper) {
    // Set the validate attribute to a function that includes validation logic.
    cmp.set('v.validate', function() {
      if(/* true conditions */) {
        return { isValid: true };
      }
      else {
        //If the component is invalid, return the isValid parameter as false and
return an error message.
        return {
          isValid: false,
          errorMessage: '/*A message that helps your user enter a valid value
or explains what went wrong.*/'
        };
      }
    });
  }
}
```

Related Updates for Developers

Lightning Components

New `validate` attribute in the [lightning:availableForFlowScreens](#) interface.

Extend Flows with Third-Party Systems and Apps Using Flow Solutions on AppExchange

Discover a growing collection of partner-built flow actions that can save you the time and effort of building your own third-party integrations. Examples of available flow actions include accepting credit card payments, conducting credit checks, and weather forecasts. If you're a consulting partner or ISV, you can share your flow solutions on the Salesforce AppExchange.

When: Flow solutions on AppExchange are available as of September 12, 2018.

How: On AppExchange, click **Solutions by Type**, then click **Flow Solutions**. Find a flow action, and follow the provider's documentation to install it. To share your flow solutions, sign up for an AppExchange Partner Program account.

SEE ALSO:

[Trailhead: AppExchange Partner Basics](#)

[AppExchange: Flow Solutions](#)

Flow Distribution: Recommended Flows, Flows in Einstein Bots, CI/CD Support

We're supporting several new ways to put your flows to work. You can recommend screen flows to the right users at the right moment with the Einstein Next Best Action pilot. Or let users choose which flow to start from the Guided Action List in standard navigation apps. Autolaunched flows are now supported in Einstein bot dialogs. For those of you deploying flows between Salesforce environments, we added support for continuous integration and continuous deployment practices.

IN THIS SECTION:

[Use Strategies to Recommend Flows to Users and Community Members \(Pilot\)](#)

Rather than displaying all flows all the time, display the right flows at the right moment to the right people with Einstein Next Best Action. Create a strategy that integrates business rules, predictive models, and data—both inside and outside of Salesforce—to show users suggested offers and actions.

[Allow Community Guest Users to Access Flows](#)

It's now possible to give unauthenticated users access to flows from your communities. Create multi-part user-registration screens with decision trees directly from your community login page.

[Launch Flows in Standard Navigation Apps with Lightning Flow for Service](#)

Guide your users through a multi-step process, like a call script, with Lightning Flow for Service and the Guided Action List. Help your service agents and sales reps provide a consistent experience to customers. When there's a hand-off, customers don't have to start over or repeat themselves. Previously, you could add the Guided Action List component only to record pages in a console app.

[Use Autolaunched Flows in Einstein Bots—No Coding Required](#)

Bring your automated processes to Einstein Bots. Open a case, update a contact, trigger a journey. Call autolaunched flows from your bot dialogs. Guide customers through multi-step processes, right in the chat conversation. Configure this powerful solution with clicks, not code.

[Deploy Active Processes and Flows Using Change Sets or Metadata API](#)

You can choose to deploy processes and flows as part of a continuous integration and continuous delivery model without manually activating them. Previously, processes and flows were always deployed as inactive. In production orgs, a new setting lets you deploy a new active version of a process or flow via change sets or Metadata API. This setting doesn't appear in non-production orgs (such as scratch, sandbox, and developer orgs), because you can always deploy a new active version.

[Version Numbers Are Omitted from Flow File Names in the API](#)

When you retrieve or deploy the latest version of a flow, Salesforce no longer adds a number to the end of each flow name. Before you deploy flow metadata using API version 44.0, upgrade your flow files with Metadata API or Salesforce CLI or both to remove the version numbers.

Use Strategies to Recommend Flows to Users and Community Members (Pilot)

Rather than displaying all flows all the time, display the right flows at the right moment to the right people with Einstein Next Best Action. Create a strategy that integrates business rules, predictive models, and data—both inside and outside of Salesforce—to show users suggested offers and actions.

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](#).

Allow Community Guest Users to Access Flows

It's now possible to give unauthenticated users access to flows from your communities. Create multi-part user-registration screens with decision trees directly from your community login page.

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

Launch Flows in Standard Navigation Apps with Lightning Flow for Service

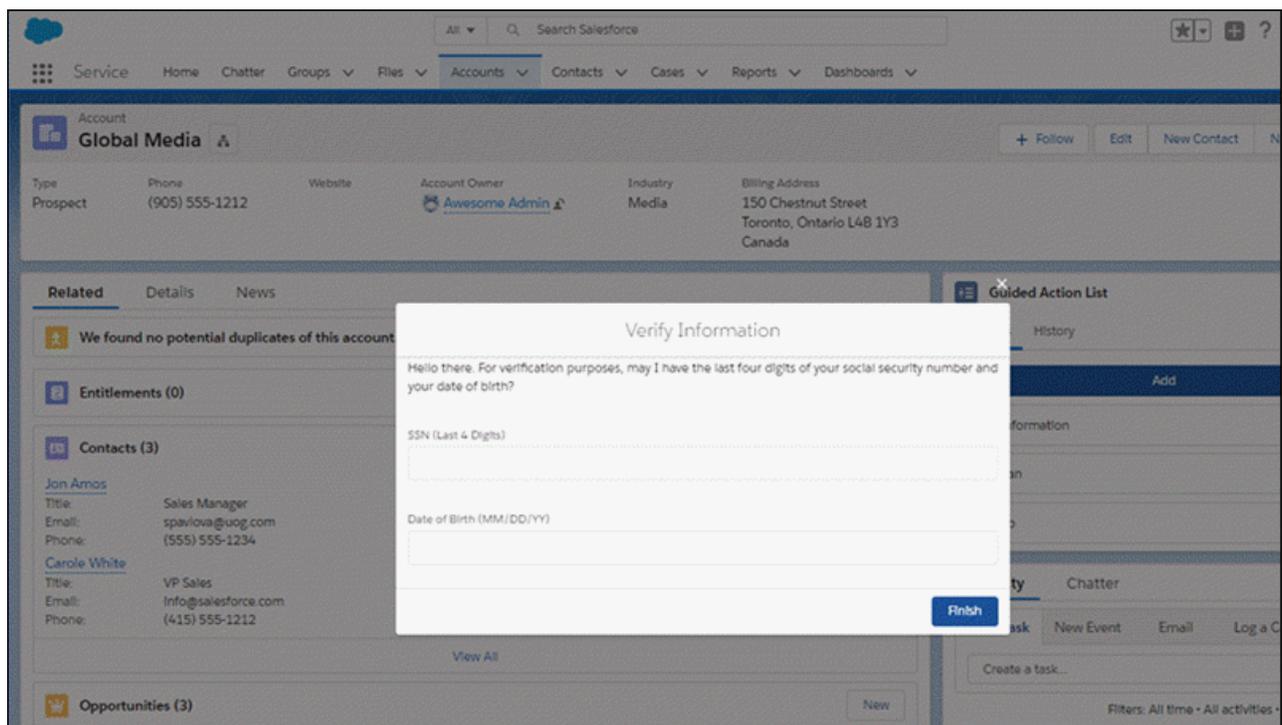
Guide your users through a multi-step process, like a call script, with Lightning Flow for Service and the Guided Action List. Help your service agents and sales reps provide a consistent experience to customers. When there's a hand-off, customers don't have to start over or repeat themselves. Previously, you could add the Guided Action List component only to record pages in a console app.

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

How: If you've used the Guided Action List component in a console app, the procedure to configure it in a standard navigation app is the same. In a standard navigation app, when a record that has an associated flow is opened, the flow launches in a popup window instead of a subtab.

Associate records to flows using Salesforce automation tools. In the Lightning App Builder, add the Guided Action List component to a record page. You can configure default flows for specific channels, like phone and chat, and specify which flows you want users to complete first and last.

When a flow is launched from the Guided Action List, it runs in a popup window. When the process completes, the popup closes, and the component updates to show the status as completed.



SEE ALSO:

[Lightning Flow for Service Developer Guide](#)

[Lightning Flow for Service: New Name and New Features to Help Agents Stay on Track](#)

Use Autolaunched Flows in Einstein Bots—No Coding Required

Bring your automated processes to Einstein Bots. Open a case, update a contact, trigger a journey. Call autolaunched flows from your bot dialogs. Guide customers through multi-step processes, right in the chat conversation. Configure this powerful solution with clicks, not code.

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.

SEE ALSO:

[Supercharge Your Bot with Autolaunched Flows—No Coding Required](#)

Deploy Active Processes and Flows Using Change Sets or Metadata API

You can choose to deploy processes and flows as part of a continuous integration and continuous delivery model without manually activating them. Previously, processes and flows were always deployed as inactive. In production orgs, a new setting lets you deploy a new active version of a process or flow via change sets or Metadata API. This setting doesn't appear in non-production orgs (such as scratch, sandbox, and developer orgs), because you can always deploy a new active version.

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

How: You must opt in to deploy active processes and flows. From Setup, enter *Process Automation Settings* in the Quick Find box, then select **Process Automation Settings**. Select **Deploy processes and flows as active**.

When you deploy an active process or flow in a production org, Salesforce runs your org's Apex tests and confirms that enough of your processes and flows have test coverage. Specifically, the Apex tests must launch at least 75% of the total number of active processes and active autolaunched flows in your org. The required percentage is the same as the code coverage requirement for Apex code. If the required percentage isn't met, the deployment is rolled back.

Related Updates for Developers

Metadata API

Updated result object: [DeployResult](#)

Apex

Updated SOAP call: [runTests\(\)](#)

SEE ALSO:

[Version Numbers Are Omitted from Flow File Names in the API](#)

[Upgrade Flow Files to Version 44.0 with Metadata API](#)

[Upgrade Flow Files to API Version 44.0 with the Salesforce CLI](#)

Version Numbers Are Omitted from Flow File Names in the API

When you retrieve or deploy the latest version of a flow, Salesforce no longer adds a number to the end of each flow name. Before you deploy flow metadata using API version 44.0, upgrade your flow files with Metadata API or Salesforce CLI or both to remove the version numbers.

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

 **Important:** This change applies only to retrieving or deploying flows via Metadata API or the Salesforce CLI. It doesn't apply to opening or saving flows in the Cloud Flow Designer.

Why: Previously, a version number was appended to the flow name. This practice interfered with continuous integration and continuous deployment practices. For example, because each flow version had a different file name, orgs couldn't track the flow's changes in a version control system, which in turn could cause deployment problems.

How: Flow names no longer include the version number when deploying or retrieving via Metadata API or the Salesforce CLI. When you deploy or retrieve a flow, we get only the latest version.

The latest version name of a flow in API version 43.0 and earlier	The latest version name of a flow in API version 44.0
myFlow-3 (where 3 is the latest version number)	myFlow (where the latest version number is no longer appended)

- If you deploy and retrieve using API version 44.0 without upgrading your flow files, the flow files that you retrieve no longer have version numbers appended. If you deploy with flow definitions, the active version numbers in the flow definitions override the status fields in the flows. For example, the active version number in the flow definition is version 3, and the latest version of the flow is version 4 with the status field as Active. After you deploy your flow, the active version is version 3.
- If you don't deploy and retrieve using API version 44.0, you can continue to use API version 43.0 and earlier, and flow file names continue to append version numbers.

Related Updates for Developers**Metadata API**

Updated the Flow metadata type with these changes.

- Changed behavior of [fullName](#) field.

- Added the new `status` field.

SEE ALSO:

[Upgrade Flow Files to Version 44.0 with Metadata API](#)

[Upgrade Flow Files to API Version 44.0 with the Salesforce CLI](#)

[Deploy Active Processes and Flows Using Change Sets or Metadata API](#)

Upgrade Flow Files to Version 44.0 with Metadata API

To support continuous integration and continuous delivery development practices, flow names no longer include the version number when deploying via Metadata API. Before you deploy flow metadata using API version 44.0, upgrade your flow files with Metadata API to remove the version numbers. When you complete the upgrade, you can integrate with a version control system without worrying about flow file names changing.

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

How: To upgrade your flow files with Metadata API, make sure that:

- The `package.xml` file is set to API version 44.0.
- The `flows` directory doesn't include unused flow versions.
- For each active flow, the `status` field shows Active. A flow without a `status` value is deployed or retrieved with the Draft status.
- The `flowDefinitions` directory is empty.
- For the latest version of each flow, the file name doesn't include a version number. For example, change `myflow-3.flow` to `myflow.flow`.

As part of this upgrade, flow definitions are no longer necessary when you deploy or retrieve with Metadata API. If you deploy with flow definitions, the active version number in the flow definition overrides the flow's `status` field. For example, the active version number in the flow definition is version 3, and the latest version of the flow is version 4 with an Active status. After you deploy your flow, version 3 is the active version.

Related Updates for Developers

Metadata API

Updated the Flow metadata type with these changes.

- Changed behavior of the `fullName` field.
- Added the new `status` field.

SEE ALSO:

[Deploy Active Processes and Flows Using Change Sets or Metadata API](#)

[Upgrade Flow Files to API Version 44.0 with the Salesforce CLI](#)

[Metadata API](#)

Upgrade Flow Files to API Version 44.0 with the Salesforce CLI

To support continuous integration and continuous delivery development practices, flow names no longer include the version number when pushing or pulling via the Salesforce CLI. Before you push flow metadata using API version 44.0 and before you pull flow metadata from a Summer '19 org, upgrade your flow files with the Salesforce CLI to remove the version numbers. When you complete the upgrade, you can integrate with a version control system without worrying about flow file names changing.

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

How: To upgrade your flow files with the Salesforce CLI, make sure that:

- You install the pre-release version of the CLI (to use this feature before Salesforce CLI v44 is released on October 13, 2018).

```
sfdx plugins:install salesforcedx@pre-release
```

Make sure that you have the pre-release version.

```
sfdx plugins --core  
salesforcedx 44.0.1-xx
```

When we officially release v44 in mid October 2018, uninstall the pre-release version, then run the `update` command.

```
sfdx plugins:uninstall salesforcedx
```

```
sfdx update
```

- The `sfdx-project.json` file is set to `"sourceApiVersion": "44.0"`.
- The `flows` directory doesn't include unused flow versions.
- For each active flow, the `status` field shows Active. A flow without a `status` value is deployed or retrieved with a Draft status.
- The `flowDefinitions` directory is empty.
- For the latest version of each flow, the file name doesn't include a version number. For example, change `myflow-1.flow-meta.xml` to `myflow.flow-meta.xml`.

As part of this upgrade, flow definitions are no longer necessary when you deploy or retrieve via Metadata API. If you deploy with flow definitions, the active version number in the flow definition overrides the flow's `status` field. For example, the active version number in the flow definition is version 3, and the latest version of the flow is version 4 with an Active status. After you deploy your flow, version 3 is the active version.

To reduce deployment issues, when you push your updated source code into a scratch org, don't reuse an existing scratch org.

Related Updates for Developers

Metadata API

Updated the Flow metadata type with these changes.

- Changed behavior of the `fullName` field.
- Added the new `status` field.

SEE ALSO:

[Deploy Active Processes and Flows Using Change Sets or Metadata API](#)

[Upgrade Flow Files to Version 44.0 with Metadata API](#)

[Salesforce CLI: Join the Evolution](#)

Track Process and Flow Test Coverage

If your org uses Apex tests to validate processes and autolaunched flows, you're probably interested in knowing what your flow test coverage is. We're introducing two Tooling API objects that you can query to calculate test coverage for processes and autolaunched flows.

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

Why: When you deploy an active process or flow, Salesforce runs your org's Apex tests and confirms that enough of your processes and flows have test coverage.

How: FlowTestCoverage represents test coverage for a flow by an Apex test method. FlowElementTestCoverage records are created when an Apex test method executes a flow element.

To calculate the overall test coverage for a flow version, query the FlowTestCoverage object. The FlowElementTestCoverage object is not used to calculate test coverage.

```
SELECT Id, ApexTestClassId, TestMethodName, FlowVersionId, NumElementsCovered,
NumElementsNotCovered
FROM FlowTestCoverage
WHERE flowversionid='301RM0000004GiK'
```

To get information about the elements executed by a test run, query the FlowElementTestCoverage object. For example, this query returns the number of unique elements that have been executed.

```
SELECT count_distinct(ElementName)
FROM FlowElementTestCoverage
WHERE FlowVersionId='301RM0000004GiK'
```

Related Updates for Developers

Tooling API

New objects: [FlowTestCoverage](#), [FlowElementTestCoverage](#)

Data Protection and Privacy: Consent Preferences Using REST API, Community User Access to Data Privacy Records

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:

[Manage Duplicate Data Privacy Settings Records with the Individual Object](#)

Now you can properly manage duplicate records for your data privacy settings. With the Individual object, you can create your own duplicate rules and matching rules to identify duplicate records. Manage duplicate data privacy records one at a time or in bulk, just like you can with other records.

[Provide Your High-Volume Community Users with Access to Data Privacy Records](#)

Now high-volume community users can store settings for data privacy using the Individual object. Use sharing sets and share groups to make the data privacy records available.

[Discover Preferences for Consent Across Multiple Records](#)

Easily track customer preferences for consent across multiple records using the REST API.

Manage Duplicate Data Privacy Settings Records with the Individual Object

Now you can properly manage duplicate records for your data privacy settings. With the Individual object, you can create your own duplicate rules and matching rules to identify duplicate records. Manage duplicate data privacy records one at a time or in bulk, just like you can with other records.

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

How: For instructions on how to create [duplicate rules](#) and [matching rules](#) for individual records, refer to [Manage Duplicate Data Privacy Records](#).

Provide Your High-Volume Community Users with Access to Data Privacy Records

Now high-volume community users can store settings for data privacy using the Individual object. Use sharing sets and share groups to make the data privacy records available.

Where: This change applies to all communities hosted on orgs with Customer Community, Customer Community Plus, and Partner Community licenses.

How: To create a sharing set that enables high-volume community users to access their individual records, refer to [Sharing Set Overview](#).

Discover Preferences for Consent Across Multiple Records

Easily track customer preferences for consent across multiple records using the REST API.

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

Why: Because your users can store requests for consent in multiple locations and possibly inconsistently, we make it easy for you to locate the requests across the records related to your customers. Regardless of whether you're complying with data protection and privacy regulations, such as the General Data Protection Regulation (GDPR), discovering the most restrictive preferences can help you honor your customers' wishes.

How: To use this API, you must have either the View All Data or the Allow User Access to Privacy Data user permission enabled. For details, refer to the [Consent](#) API in the REST API Developer Guide.

AppExchange: Personalized Recommendations and Search Filters

Find the AppExchange solutions that interest you with the new Recommended for You section. Get personalized solution recommendations based on your past searches, installs, and other aspects of your AppExchange experience. Use search filters to hone in on solutions that match your business requirements.

IN THIS SECTION:

[Find What's Best for Your Business with Recommended AppExchange Solutions](#)

We picked the top solutions for your business and gathered them in a new AppExchange section called Recommended for You. Picks are inspired by how you use AppExchange, with recommendations based on your past searches, installs, and product interests. The more that you explore AppExchange, the better the recommendations get.

[Focus Your AppExchange Search Results with Filters](#)

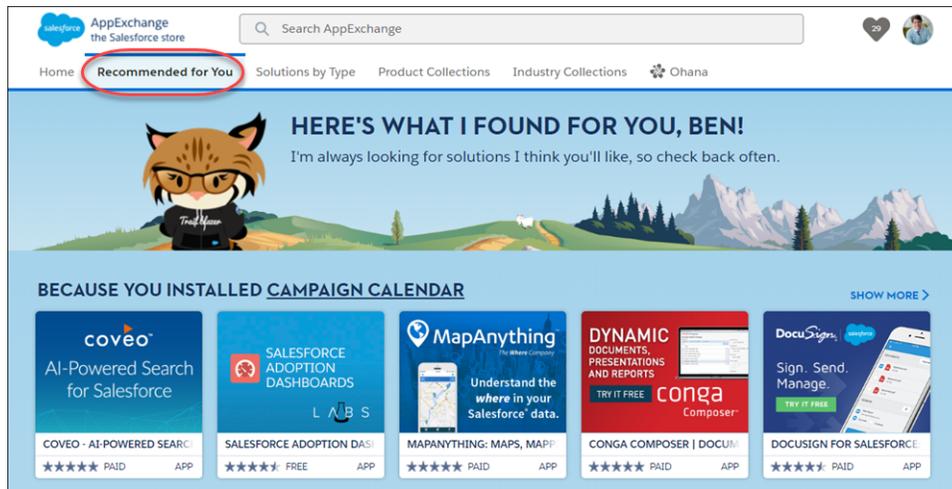
If your AppExchange search returns a mountain of results, apply filters to focus on just the solutions that meet your requirements. You can mix and match filters for solution type, price, customer rating, edition, and more.

Find What's Best for Your Business with Recommended AppExchange Solutions

We picked the top solutions for your business and gathered them in a new AppExchange section called Recommended for You. Picks are inspired by how you use AppExchange, with recommendations based on your past searches, installs, and product interests. The more that you explore AppExchange, the better the recommendations get.

Where: This change applies to the AppExchange website.

How: Go to AppExchange, and click **Recommended for You**. Then log in to see the solutions that we've picked for you.

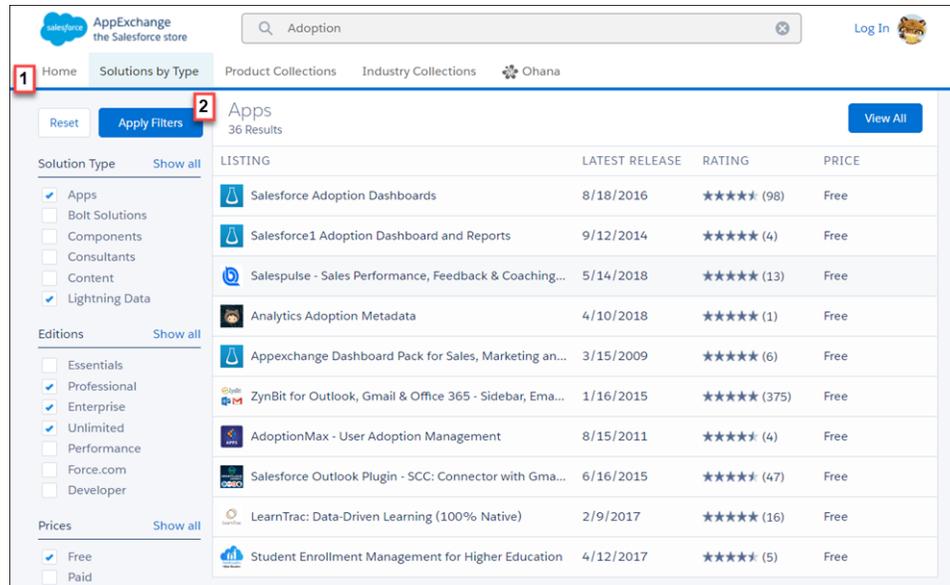


Focus Your AppExchange Search Results with Filters

If your AppExchange search returns a mountain of results, apply filters to focus on just the solutions that meet your requirements. You can mix and match filters for solution type, price, customer rating, edition, and more.

Where: This change applies to the AppExchange website.

How: Search for a solution on AppExchange. To refine the results, select criteria from the filter panel (1), and click **Apply Filters** (2).



General Setup: Custom Field Management Improvement (Pilot), Import and Integration Tools in Setup, Approval Requests to Queues

View where a custom field is referenced, such as a formula, layout, or report with the Where Is This Used? button (Pilot). The new Integrations page in Setup is your one-stop shop for import and integration tools. View your approval requests in queues no matter which Salesforce experience you're using.

IN THIS SECTION:

[Check a Field's References Before You Edit It \(Pilot\)](#)

Now you can see the references to a custom field, such as in a report or formula, with the click of a button. You can also communicate changes to others who use the field in a formula or other context.

[Find Import and Integration Products in a New Setup Page](#)

The Setup menu has a new page called Integrations where you can conveniently find various import and integration tools all in one place.

[See Approval Requests Assigned to Your Queues in All Salesforce Experiences](#)

Users now see approval requests assigned to them and to their queues regardless of which Salesforce user interface they're using. Previously, approval requests assigned to queues appeared only in Salesforce Classic.

[Select Multiple Page Layout Assignments in macOS with Command Click](#)

macOS users, you can now use the Command key to click and select multiple non-adjacent cells or rows when assigning page layouts to profiles or record types.

[Enable Japanese Imperial Calendar in Lightning Experience](#)

Starting with the Winter '19 release, Salesforce supports the Japanese imperial calendar in Lightning Experience for the Japanese (Japan) locale.

[Use PATCH in Your External Service Schema](#)

You can now make smaller, partial changes to resources in your External Services schema using `PATCH`.

[Add a Namespace Prefix to pageReference.state Properties and Query Parameters](#)

This critical update addresses an issue with naming conflicts between package components. A namespace prefix distinguishes your package and its contents from other developers' packages. Namespace prefixes prevent conflicts between components on the state or query parameter name. Query parameters and `pageReference.state` properties must have namespace prefixes. If they don't have namespace prefixes, the critical update removes them from the org's URLs. This critical update is automatically enabled in Summer '19 on May 17, 2019.

Check a Field's References Before You Edit It (Pilot)

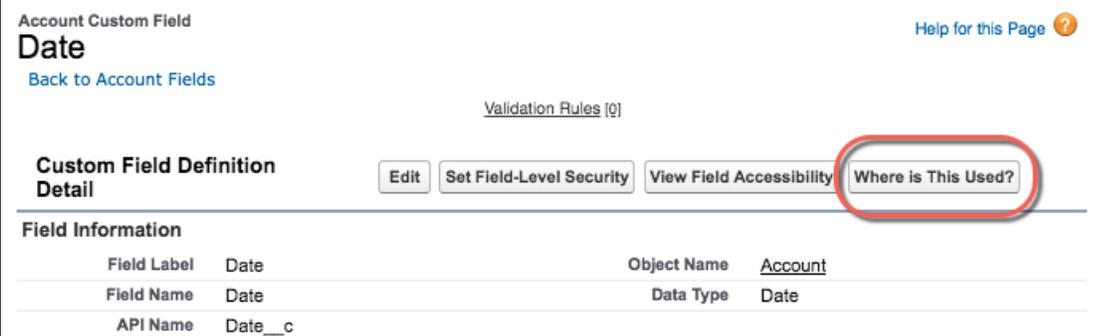
Now you can see the references to a custom field, such as in a report or formula, with the click of a button. You can also communicate changes to others who use the field in a formula or other context.

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

 **Note:** We provide the **Where is This Used?** button for custom fields to selected customers through a pilot program that requires agreement to specific terms and conditions. For information on enabling this feature, contact Salesforce. The **Where is This Used?** button for custom 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: Admins can use the **Where is This Used?** button for custom fields through a pilot program. The Customize Application permission is required.

How: The **Where is This Used?** button is on the page where you manage a custom field.



The screenshot shows the Salesforce interface for managing a custom field. At the top, it says "Account Custom Field" and "Date". There is a "Help for this Page" link with a question mark icon. Below that is a "Back to Account Fields" link. In the center, there is a "Validation Rules [0]" link. Underneath, there is a section titled "Custom Field Definition Detail" with four buttons: "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is This Used?". The "Where is This Used?" button is circled in red. Below this section is a "Field Information" table.

Field Label	Date	Object Name	Account
Field Name	Date	Data Type	Date
API Name	Date__c		

Click the button to see the field reference detail page.

Where is This Used?
Date [Help for this Page](#) ?

Below is a list of references to this field. Click the reference label to view the definition.

Reference Type	Reference Label
ApexClass	DateSet
CustomField	Bus_days
CustomField	Future
Layout	Account (Marketing) Layout
Layout	Account (Sales) Layout
Layout	Account (Support) Layout
Layout	Account Layout

Always show me [more](#) records per related list

The list can include these references.

- Validation Rule
- Layout
- Formula Field
- Visualforce Page
- Apex Class
- Apex Trigger
- Email Template (Classic, Text Based)
- Field Set
- Flow (Query)
- Lightning Component Markup (Attr)
- Process Builder (Criteria)
- URL Button (Formula)
- Lightning Page (Related List Single)
- Lookup Filter (Lookup and Master Detail)

Click a reference label to go to the settings for that layout, report, formula, or other reference.

 **Note:** References within a managed package are not included in the list within the subscriber org. For example, you have a number field referenced in a formula. If you add the field to a package and install the package in a subscriber org, the subscriber org's field reference detail page does not show that this number field is referenced in a formula field.

However, new references created after installing the managed package in the subscriber org do appear. For example, after you install the managed package and you add that number field to another formula in the subscriber org, the new reference appears.

SEE ALSO:

[Salesforce Help: Manage Fields for a Specific Object](#)

Find Import and Integration Products in a New Setup Page

The Setup menu has a new page called Integrations where you can conveniently find various import and integration tools all in one place.

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

Why: The Integrations page is home to these Setup objects:

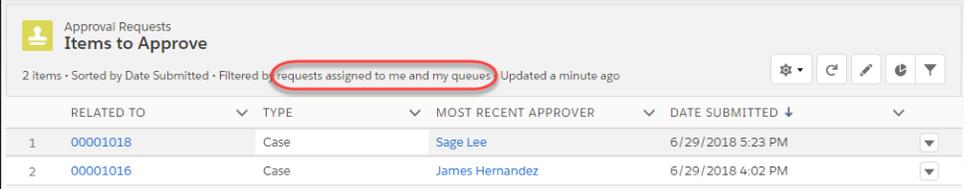
- API
- Change Data Capture
- Data Import Wizard
- Data Loader
- Dataloader.io
- External Data Sources
- External Objects
- External Services
- Platform Events

See Approval Requests Assigned to Your Queues in All Salesforce Experiences

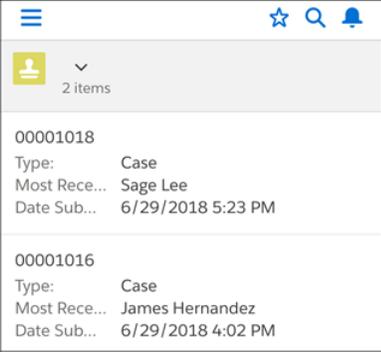
Users now see approval requests assigned to them and to their queues regardless of which Salesforce user interface they're using. Previously, approval requests assigned to queues appeared only in Salesforce Classic.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

Why: When someone assigns an approval request to a queue, the queue members can see it in the Items to Approve list.



RELATED TO	TYPE	MOST RECENT APPROVER	DATE SUBMITTED
1 00001018	Case	Sage Lee	6/29/2018 5:23 PM
2 00001016	Case	James Hernandez	6/29/2018 4:02 PM



ID	Type	Most Recent Approver	Date Submitted
00001018	Case	Sage Lee	6/29/2018 5:23 PM
00001016	Case	James Hernandez	6/29/2018 4:02 PM

Related Updates for Developers

Metadata API

Updated the [ListView](#) metadata type.

Select Multiple Page Layout Assignments in macOS with Command Click

macOS users, you can now use the Command key to click and select multiple non-adjacent cells or rows when assigning page layouts to profiles or record types.

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

How: Hold down the Command key, and click the items that you want to include.

Page Layout To Use: -- Select Page Layout --		
		5 Selected 0 Changed
Profiles	Record Types (1-2 of 2)	
	Master	Internal User
Contract Manager	Account Layout	Account (Marketing) Layout
Cross Org Data Proxy User	Account Layout	Account (Marketing) Layout
Custom: Marketing Profile	Account (Marketing) Layout	Account (Marketing) Layout
Custom: Sales Profile	Account (Sales) Layout	Account (Marketing) Layout
Custom: Support Profile	Account (Support) Layout	Account (Marketing) Layout
Customer Community Login User	Account Layout	Account (Marketing) Layout
Customer Community Plus Login User	Account Layout	Account (Marketing) Layout
Customer Community Plus User	Account Layout	Account (Marketing) Layout
Customer Community User	Account Layout	Account (Marketing) Layout
Customer Portal Manager Custom	Account Layout	Account (Marketing) Layout
Customer Portal Manager Standard	Account Layout	Account (Marketing) Layout
Force.com - App Subscription User	Account Layout	Account (Marketing) Layout
Gold Partner User	Account Layout	Account (Marketing) Layout
High Volume Customer Portal	Account Layout	Account (Marketing) Layout
Inside Sales	Account (Sales) Layout	Account (Marketing) Layout
Marketing User	Account Layout	Account (Marketing) Layout
Partner App Subscription User	Account Layout	Account (Marketing) Layout
Partner Community Login User	Account Layout	Account (Marketing) Layout

Enable Japanese Imperial Calendar in Lightning Experience

Starting with the Winter '19 release, Salesforce supports the Japanese imperial calendar in Lightning Experience for the Japanese (Japan) locale.

Where: This change applies to Lightning Experience and all versions of the mobile app in Group, Professional, Enterprise, Performance, Unlimited, Database.com, and Developer editions.

How: From Setup, enter `user` in the Quick Find box, then select **User Interface**. Select **Enable Japanese Imperial Calendar in Lightning Experience for the Japanese (Japan) locale**.

Use PATCH in Your External Service Schema

You can now make smaller, partial changes to resources in your External Services schema using `PATCH`.

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

Add a Namespace Prefix to `pageReference.state` Properties and Query Parameters

This critical update addresses an issue with naming conflicts between package components. A namespace prefix distinguishes your package and its contents from other developers' packages. Namespace prefixes prevent conflicts between components on the state or query parameter name. Query parameters and `pageReference.state` properties must have namespace prefixes. If they don't have namespace prefixes, the critical update removes them from the org's URLs. This critical update is automatically enabled in Summer '19 on May 17, 2019.

Where: This change applies to Lightning Experience and the Salesforce app in all editions. This change does not affect Visualforce or Salesforce Classic URLs.

How: To add a namespace prefix for a managed package, see [Register a Namespace Prefix](#). If you don't have a registered namespace, add the default namespace of `c__`. To test and ensure that your namespace prefixes work, enable this critical update. If you run into issues, ensure that you've prefixed the values with a namespace. If you continue to have issues, contact Salesforce Customer Support.

Once you've added namespace prefixes, enable the critical update. From Setup, enter *Critical Updates* in the Quick Find box. Then select **Critical Updates**. For Add a Namespace Prefix to Query Parameters and `pageReference.state` Properties, click **Acknowledge**.

Security and Identity: More Sign-Up, Login, and Logout Options; Fields You Can Encrypt; and Ways to Protect Your Users

Your community members and other external users can now use an email address or a phone number to log in or sign up, and with single logout, you can identify which user sessions to end. You can encrypt many more fields and control who can change encryption policies. The new transaction policy wizard makes creating transaction security policies faster and easier. And your users are safer with alerts that warn them before they are redirected from Salesforce.

IN THIS SECTION:

[Authentication and Identity: More Sign-In and Sign-Up Options, Mulesoft Integration, Single-Logout Session Support, OpenID Connect Logins for Internal Users](#)

Salesforce Authentication and Identity now gives you several more options for logging in and signing up community members and other external users. More highlights: Add background images to all your community login pages. Use Mulesoft to access and manage your connected apps. Configure single logout to identify which user sessions to end. Set up authentication to let employees log in to your communities through any provider that supports the OpenID protocol, like Google or PayPal.

[Salesforce Shield: Encryption Scheme Availability Through the API, More Field Encryption, and Improved Transaction Policy Wizard](#)
Create Transaction Security policies faster and easier with an improved UI. Encrypt even more data and manage more tenant secret rotation and encryption policy tasks through the API.

[Other Security Changes: Platform Integration User Tracking, Alerts to Warn Users Before Redirect, and Sharing Access Management](#)

The Platform Integration User is now traceable in the debug logs, giving you more visibility into this automated user. Protect against phishing and malicious links by warning users before they are redirected out of Salesforce. Restrict who has access to sharing settings by requiring a high-assurance session level.

Authentication and Identity: More Sign-In and Sign-Up Options, Mulesoft Integration, Single-Logout Session Support, OpenID Connect Logins for Internal Users

Salesforce Authentication and Identity now gives you several more options for logging in and signing up community members and other external users. More highlights: Add background images to all your community login pages. Use Mulesoft to access and manage your connected apps. Configure single logout to identify which user sessions to end. Set up authentication to let employees log in to your communities through any provider that supports the OpenID protocol, like Google or PayPal.

IN THIS SECTION:

[Let External Users Log In with Their Phone Number, Email, or Any Identifier You Choose](#)

In just a few clicks, you can deploy login pages that simplify how external users log in to your community. With the Login Discovery feature, you can let your external users identify themselves using something other than a username, such as a phone number. Instead of a password, they can verify their identity with a code sent to their email or mobile device. And, if your org is enabled with multiple Identity Providers (IdPs), login is a one-step process—users bypass verification altogether.

[Let Visitors Sign Up for Your Community by Email or Phone](#)

Make it easy for customers to join your community. Instead of requiring a username and password to register, let them join by entering their email address or phone number. Configurable self-registration simplifies the sign-up process. It allows you to register users quickly and with minimal information. After the user is created, you can build the user's profile progressively when logging in later. For example, you can collect more user information based on context or the type of interaction.

[Jazz Up Your Login Pages with a Customized Background Image](#)

Make your login pages stand out with an eye-catching background. Give your external users the login experience that reflects your unique brand. For example, enter a URL to display an image or color gradient as the background. Or use a dynamic URL to determine which background image to display at run time.

[Add Your Own Voice to Salesforce Boilerplate Identity Verification Emails](#)

Tailor your community's identity verification emails. When users verify their identity by email, Salesforce sends a generic email notification with a verification code. You can reword the message to control how you communicate with your customers and partners. Users receive a verification email whenever they're required to verify their identity. For example, during login discovery, passwordless login, configurable self-registration, device activation, and U2F device registration.

[Purchase an Add-On License to Verify Identities by SMS](#)

Salesforce has a new usage-based entitlement license that tracks SMS messaging for identity verification. This add-on license is available with all external user licenses. It enables Communities and External Identity customers to send text messages to their users for identity verification purposes.

[Give Internal Users Login Access to Communities Through an External Authentication Provider](#)

Previously, internal users accessed a community either through the Community login page or by logging in to Salesforce and accessing the community through SAML single sign-on. Now internal users can access a community through an external authentication provider for apps that support the OpenID Connect protocol, such as Google.

[Enable OpenID Connect Authentication with Mulesoft Access Management](#)

The Salesforce integration with Mulesoft allows you to access and manage system API integration with your connected apps, providing a seamless user experience during login. As part of this experience, you can now enable OpenID Connect single sign-on (SSO) and authentication for Mulesoft Access Management when Salesforce is the identity provider. SAML SSO is already supported. With SSO, users can log in to Salesforce and access Mulesoft without separately logging in to Mulesoft. With OpenID Connect authentication, users can log in from Salesforce to access Mulesoft.

[Streamline Connected App Integrations with OAuth 2.0 Endpoints \(Beta\)](#)

As part of OpenID Connect authentication, Salesforce now supports the OAuth 2.0 dynamic client registration and token introspection endpoints. Dynamic client registration allows OpenID Connect client apps to automatically create child OAuth 2.0 connected apps with Salesforce. Token introspection enables client apps to check the current state of an OAuth 2.0 access or refresh token.

[Get Improved Accessibility in the Lightning Experience App Launcher](#)

With the accessibility redesign of the Lightning Experience App Launcher, your community members, customers, and other users get a better, more intuitive navigational experience. In addition, newly implemented Salesforce Lightning Design System (SLDS) standards enable screen readers to correctly announce the App Launcher cards and All Items section.

[Use the REST API to Manage User Identities with SCIM 2.0](#)

Salesforce now supports version 2.0 of System for Cross-Domain Identity Management (SCIM). SCIM is an open standard for exchanging user identity information across systems using the REST API. Salesforce provides extensions to the spec for Salesforce-specific identity information. SCIM makes it easier to manage user identities, especially for large companies that host thousands of apps and related servers and databases. Without a standard connection method, companies must write custom software connectors to join these services.

[Identify which User Session to Close During SAML Single Logout](#)

Some identity providers and service providers require a session index parameter in the logout request or response to identify the user session to close. Salesforce now supports session index parameters with SAML single logout (SLO). When a user logs out of a connected app registered for SAML SLO, the session index parameter can help identify which user session to end.

[Get JSON-Compliant Values in the UserInfo Endpoint, Identity URL Response, and ID Token](#)

The `updated_at` attribute in the UserInfo endpoint, identity URL, and ID token now conforms to the OpenID Connect Core 1.0 specification. The `address` value in the ID token (if standard claims are enabled) also conforms to the specification.

[Set Different Login Policies for Salesforce and Community Users \(Generally Available\)](#)

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. Also, OAuth authentication for internal users is now supported on community domains.

Let External Users Log In with Their Phone Number, Email, or Any Identifier You Choose

In just a few clicks, you can deploy login pages that simplify how external users log in to your community. With the Login Discovery feature, you can let your external users identify themselves using something other than a username, such as a phone number. Instead of a password, they can verify their identity with a code sent to their email or mobile device. And, if your org is enabled with multiple Identity Providers (IdPs), login is a one-step process—users bypass verification altogether.

Where: This feature is available in all communities, accessed through Lightning Experience, Salesforce Classic, and all versions of the Salesforce app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: External Identity and Communities admins can log in users with several verification methods, including email, SMS, Salesforce Authenticator, or a U2F security device. To verify identities via text message, you purchase a license for Identity Verification Credits, which allows your org a predetermined number of SMS messages for identity verification. For exact limits, contact your Salesforce account rep.

 **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.

Why: This feature continues the work begun in Salesforce Spring '18 to support passwordless login. In Spring '18, we gave developers the ability to create passwordless login pages programmatically. Now admins can point and click to get this functionality—and more—from the UI.

How: Admins use the Login & Registration page of the Administration Workspace to customize how external users log in to their communities. When they select the new Login Discovery Page login page type, by default, Salesforce generates a login page that prompts the user for an email address or phone number.

Login Page Setup

Choose a login page type to create a branded login experience. Depending on the login page type, your users can log in with their username, email, phone number, or other user identifier. [Learn more](#)

Login Page Type Login Discovery Page ⓘ

Login Prompt Email or Phone ⓘ

• Login Discovery Handler AutocreatedDiscLoginHandler1532705706806 ⓘ ⓘ
[Create a Login Discovery Handler](#)

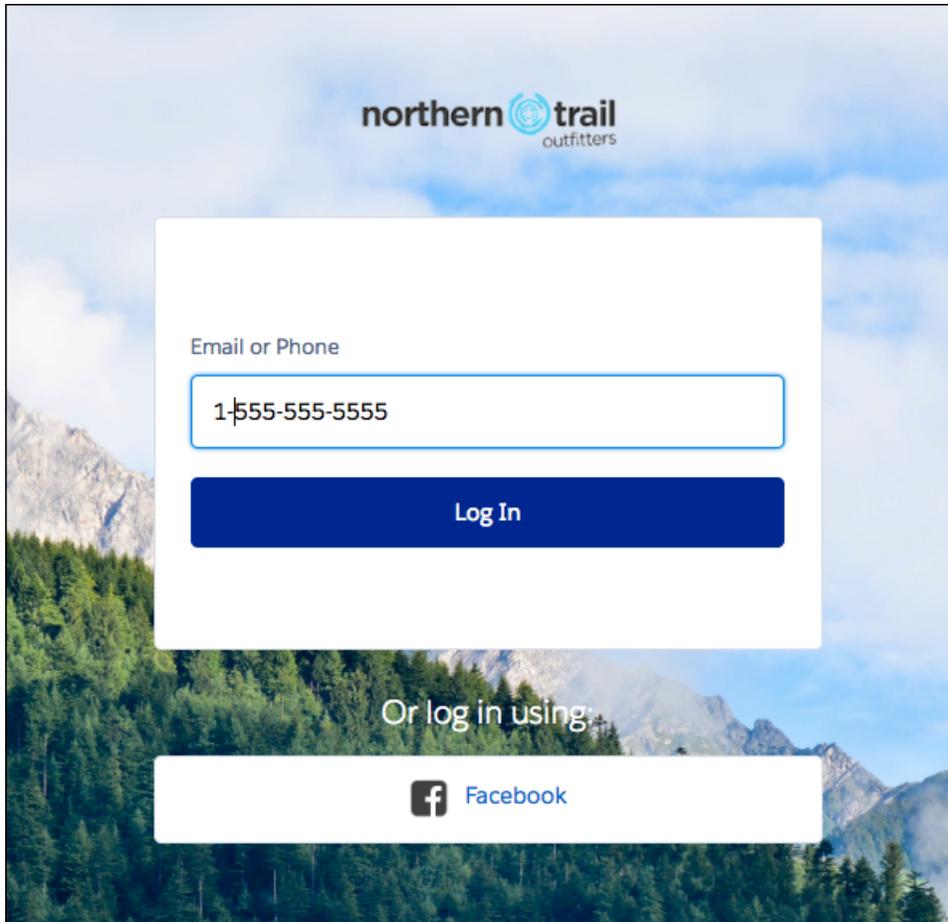
• Execute Login As Joan Admin ⓘ ⓘ

Allow internal users to log in directly to the community ⓘ

Select login options to display on the login page. To add more login options, visit [Single Sign-On Settings](#) or [Auth. Providers in Setup](#). ⓘ

Main 214 Org username and password
 Facebook
 Google

For example, this configuration generates a login page that contains a field to prompt for an email address or phone number. Because Facebook is selected above, the login page has a button for Facebook to let users identify themselves with their Facebook credentials.



Salesforce generates a login discovery Apex handler that contains the logic for users to identify themselves by email or text message. You can customize this handler, for example, to use other identifiers, such as a Federation ID or vendor ID. You can also add logic to simplify login when your org is configured with multiple identity providers or single sign-on integrations. Instead of users guessing which SSO to choose, the handler “discovers” the appropriate provider and invokes SSO for them.

The handler is located in Setup under Apex Classes. Its name begins with `AutocreatedDiscLoginHandler`, such as `AutocreatedDiscLoginHandler1532705706806`. Salesforce appends digits to the name to ensure that it's unique to your org.

-  **Note:** When you select Login Discovery Page as the login page type, you can't select Community Builder Page for the self-registration page type. Likewise, if you select Community Builder Page as the login page type, you must select Community Builder Page as the self-registration page type.

SEE ALSO:

[External Identity for Customers and Partners Guide: External Identity for Customers and Partners Guide \(can be outdated or unavailable during release preview\)](#)

Let Visitors Sign Up for Your Community by Email or Phone

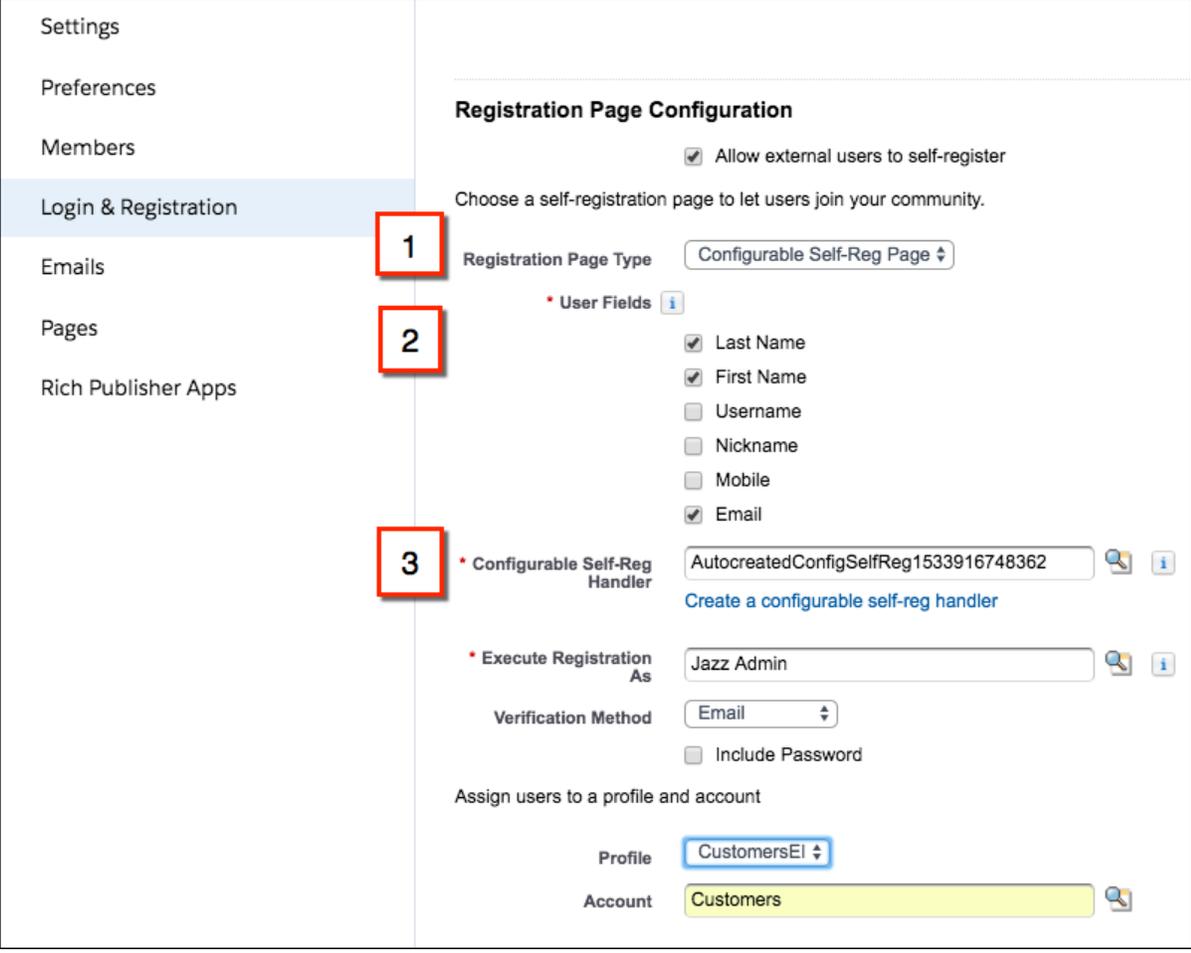
Make it easy for customers to join your community. Instead of requiring a username and password to register, let them join by entering their email address or phone number. Configurable self-registration simplifies the sign-up process. It allows you to register users quickly and with minimal information. After the user is created, you can build the user's profile progressively when logging in later. For example, you can collect more user information based on context or the type of interaction.

Where: This feature is available in all communities accessed through Lightning Experience, Salesforce Classic, and all versions of the Salesforce app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Who: External Identity and Communities admins can let visitors register with their email address or phone number. To verify identities via text message, you purchase a license for Identity Verification Credits, which allows your org a predetermined number of SMS messages for identity verification. For exact limits, contact your Salesforce account rep.

 **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.

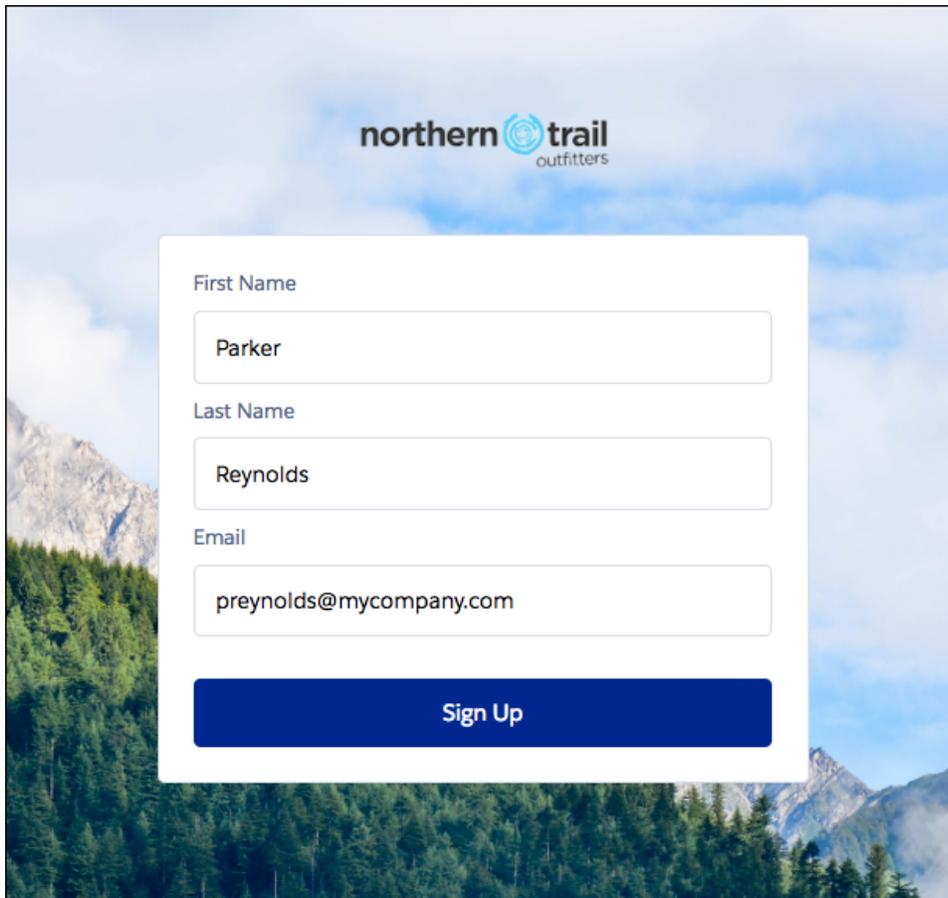
How: You set up the self-registration page on the Community Workspaces Login & Registration page. First, select **Configurable Self-Reg Page** (1). Then choose which fields to display on the sign-up form (2). After you save your registration settings, Salesforce generates the configurable self-registration handler, in this case, `AutocreatedConfigSelfReg1532475901849` (3).



The screenshot displays the 'Registration Page Configuration' settings. The left sidebar has 'Login & Registration' selected. The main configuration area includes:

- Allow external users to self-register:**
- Choose a self-registration page to let users join your community:**
 - Registration Page Type:** Configurable Self-Reg Page (1)
- User Fields:**
 - Last Name
 - First Name
 - Username
 - Nickname
 - Mobile
 - Email
- Configurable Self-Reg Handler:** AutocreatedConfigSelfReg1533916748362 (3)
- Execute Registration As:** Jazz Admin
- Verification Method:** Email
- Include Password
- Assign users to a profile and account:**
 - Profile:** CustomersEI
 - Account:** Customers

The Configurable Self-Reg page generates a sign-up form that prompts users to register with the registration fields that you selected.

A screenshot of a self-registration form for 'northern trail outfitters'. The form is centered on a background image of a mountain range with a forest. The form has a white background and a blue border. At the top, the logo 'northern trail outfitters' is displayed. Below the logo, there are three input fields: 'First Name' with the value 'Parker', 'Last Name' with the value 'Reynolds', and 'Email' with the value 'preynolds@mycompany.com'. At the bottom of the form is a blue button labeled 'Sign Up'.

- ✔ **Note:** When you select Configurable Self-Reg Page as the registration page type, you can't select Community Builder Page for the login page type. Likewise, if you select Community Builder Page as the self-registration page type, you must select Community Builder Page as the login page type.

You can edit the generated Configurable Self-Reg handler in Apex to further customize self-registration. For example, you can add custom logic to ensure that the email or phone number are unique to the external user. You can modify user creation to eliminate the need for associating contacts with accounts. The handler is located in Setup under Apex Classes. Its name begins with `AutocreatedConfigSelf-Reg`, such as `AutocreatedConfigSelf-Reg1532705701849`.

- ✔ **Note:** Registered community users require API access permission to log in to communities using the Salesforce app. To give permission, you update the External Identity profile. From the Setup Profiles page, clone the External Identity profile, and select **API Enabled**.

SEE ALSO:

[External Identity for Customers and Partners Guide: External Identity for Customers and Partners Guide \(can be outdated or unavailable during release preview\)](#)

Jazz Up Your Login Pages with a Customized Background Image

Make your login pages stand out with an eye-catching background. Give your external users the login experience that reflects your unique brand. For example, enter a URL to display an image or color gradient as the background. Or use a dynamic URL to determine which background image to display at run time.

Where: This feature is available in all communities accessed through Lightning Experience, Salesforce Classic, and all versions of the Salesforce app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

Why: On the Login & Registration page of the Administration Workspace, you can specify your logo with a file or URL. For the background, choose a color, or enter a URL to an image. For a dynamic background, enter a URL with the `expid` placeholder within brackets, for example, `https://www.my-cms.com/{expid}/background.png`.

Branding Options

Customize your community's login experience to reflect your brand. You can use dynamic branding URLs to change how login and related pages appear at runtime. [Learn about Dynamic Branding URLs](#)

Logo Type File ⓘ

Logo File Choose File No file chosen
JPG, GIF or PNG, 100 KB max.



125 px max

250 px max

Background Type Image URL ⓘ

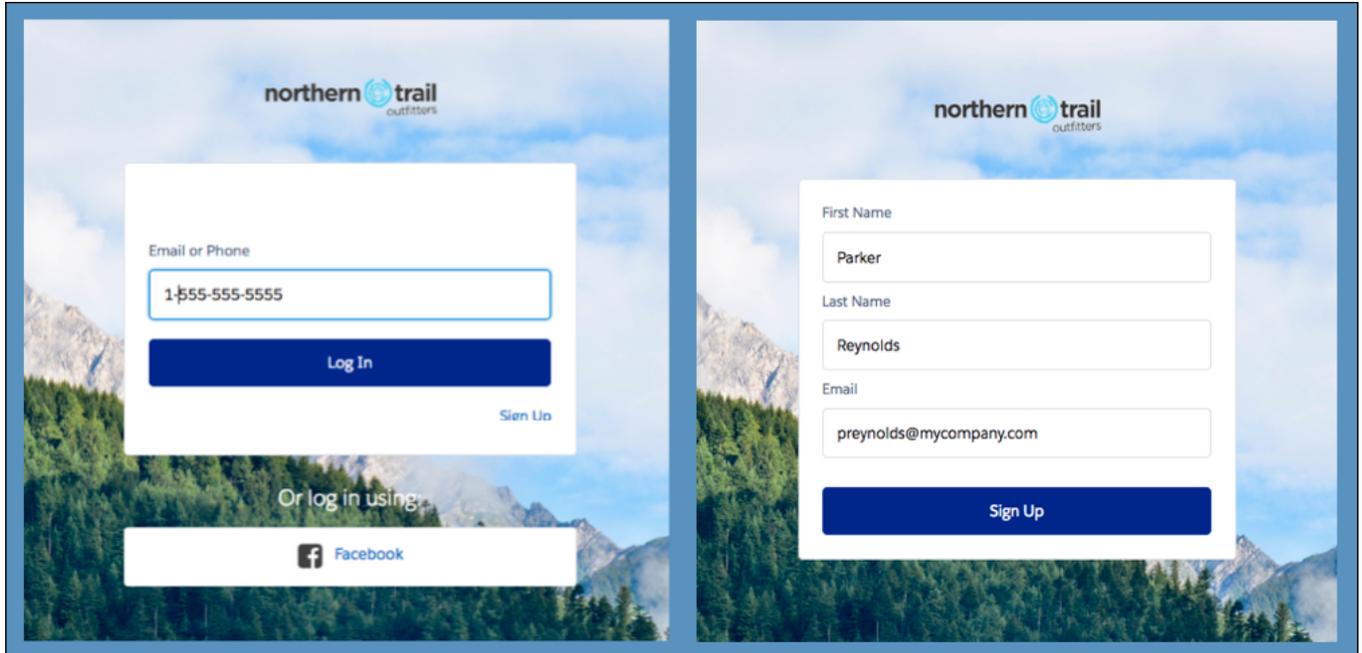
Background Image URL http://identitycms.herokuapp.com/promo-transpa ⓘ

Login Button #002892 ⓘ

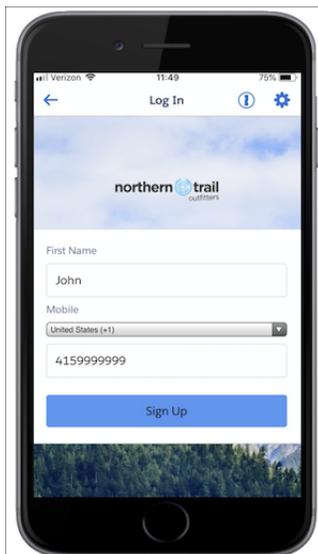
Right Frame URL ⓘ

Footer Text Copyright Northern Trail ⓘ

Branding options apply to the entire login experience: the login page `axid_nd` related pages, including verify, sign-up, and reset password. Login flows are branded as well.



Branding options are also supported in mobile—on browsers and in Salesforce Mobile SDK apps.



Add Your Own Voice to Salesforce Boilerplate Identity Verification Emails

Tailor your community's identity verification emails. When users verify their identity by email, Salesforce sends a generic email notification with a verification code. You can reword the message to control how you communicate with your customers and partners. Users receive a verification email whenever they're required to verify their identity. For example, during login discovery, passwordless login, configurable self-registration, device activation, and U2F device registration.

Where: This feature is available in all communities accessed through Lightning Experience, Salesforce Classic, and all versions of the mobile app. Communities are available in Enterprise, Performance, Unlimited, and Developer editions.

How: Salesforce provides the One-Time Password email template for communities to handle identity verification. You can use it as is or make it your own. Enable the One-Time Password email template from the Emails page of the Administration Workspace.

The screenshot shows the 'Email Templates' configuration page for a community. On the left is a navigation menu with options: Settings, Preferences, Members, Login & Registration, **Emails**, Pages, and Rich Publisher Apps. The main content area is titled 'Email Templates' and contains the following items:

- Welcome New Member:** Includes a checked checkbox for 'Send welcome email' and a text field containing 'Communities: New Member Welcome Email'. A note below states: 'Welcome emails are sent once the community is activated, and then whenever a member is added.'
- Forgot Password:** A text field containing 'Communities: Forgot Password Email'.
- Change Password:** A text field containing 'Communities: Changed Password Email'.
- Case Comment:** An empty text field.
- User Lockout:** A text field containing 'Communities: User Lockout Email'.
- One-Time Password:** A text field containing 'Communities: One Time Password Email'. This row is circled in red.

At the bottom of the page are 'Save' and 'Cancel' buttons.

Then you can customize the template, which you can find on the Classic Email Templates page in Setup. Click **Edit** next to Communities: One-Time Password Email, and use the available merge fields listed at the top of the page to personalize your content.

You can also customize the email template through the API using the `verificationTemplate` field on the API `Network` object.

You can create your own custom OTP email template in Visualforce and use the `$Network` object.

SEE ALSO:

[Salesforce Help: Customize Email Sent from Communities \(can be outdated or unavailable during release preview\)](#)

Purchase an Add-On License to Verify Identities by SMS

Salesforce has a new usage-based entitlement license that tracks SMS messaging for identity verification. This add-on license is available with all external user licenses. It enables Communities and External Identity customers to send text messages to their users for identity verification purposes.

Where: SMS verification messaging is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app. The Identity Verification Credits add-on license is available for purchase for all editions.

Who: You purchase a license for Identity Verification Credits, which allows your org a predetermined number of SMS messages for identity verification. For exact limits, contact your Salesforce account rep.

How: Internal usage for employees doesn't count toward this limit. However, the Apex method for SMS registration counts.

You can track how many identity verification credits that your org has consumed from the Setup Company Information page. The status of Identity Verification Credits appears under Usage-based Entitlements at the bottom. Typically, the status is updated daily, but can take longer.

Usage-based Entitlements							Usage-based Entitlements Help ?	
Resource	Resource ID	Start Date	End Date	Frequency	Allowance	Amount Used	Usage Date	
Maximum Custom BigObjects Rows	(tenant)	8/10/2018	8/11/2019	Once	1,000,000	0	8/13/2018, 4:59 PM	
Customer Community Logins	(tenant)	8/10/2018	8/11/2019	Monthly	1	3	8/11/2018, 4:59 PM	
Customer Community Plus Daily Unique Logins	(tenant)	8/10/2018	8/11/2019	Monthly	11			
Partner Community Logins	(tenant)	8/10/2018	8/11/2019	Monthly	1			
Maximum Flow Interviews with UI per Month	(tenant)	8/10/2018	8/11/2019	Monthly	20,000			
Partner Community Daily Unique Logins	(tenant)	8/10/2018	8/11/2019	Monthly	1			
Maximum Flow Interviews Without UI per Month	(tenant)	8/10/2018	8/11/2019	Monthly	100,000,000			
Available Identity Verification Message Credits	(tenant)	8/10/2018	8/11/2019	Once	25,000	4	8/15/2018, 4:59 PM	
Customer Community Daily Unique Logins	(tenant)	8/10/2018	8/11/2019	Monthly	1	1	8/11/2018, 4:59 PM	

SEE ALSO:

[Salesforce Help: Usage-based Entitlements \(can be outdated or unavailable during release preview\)](#)

Give Internal Users Login Access to Communities Through an External Authentication Provider

Previously, internal users accessed a community either through the Community login page or by logging in to Salesforce and accessing the community through SAML single sign-on. Now internal users can access a community through an external authentication provider for apps that support the OpenID Connect protocol, such as Google.

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

How: Your Salesforce developer must update the Apex `createUser(portalId, userData)` registration handler method to account for both internal and external user creation during OpenID Connect SSO to communities. For example, the developer can use a unique attribute in the `userData` object to determine whether the newly created user is internal or external.

The remaining processes of creating external users, configuring the service provider website, and defining the authentication provider in your org remain the same.

SEE ALSO:

[Salesforce Help: Configure Authentication Providers \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: External Authentication Providers \(can be outdated or unavailable during release preview\)](#)

[Apex Developer Guide: RegistrationHandler Interface \(can be outdated or unavailable during release preview\)](#)

Enable OpenID Connect Authentication with Mulesoft Access Management

The Salesforce integration with Mulesoft allows you to access and manage system API integration with your connected apps, providing a seamless user experience during login. As part of this experience, you can now enable OpenID Connect single sign-on (SSO) and authentication for Mulesoft Access Management when Salesforce is the identity provider. SAML SSO is already supported. With SSO, users can log in to Salesforce and access Mulesoft without separately logging in to Mulesoft. With OpenID Connect authentication, users can log in from Salesforce to access Mulesoft.

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

How: The Salesforce OAuth 2.0 token endpoint now accepts client credentials in the basic authentication header of the HTTP request. Salesforce can be the OpenID Connect authentication provider for Mulesoft.

SEE ALSO:

[Salesforce Help: Single Sign-On \(can be outdated or unavailable during release preview\)](#)

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

Streamline Connected App Integrations with OAuth 2.0 Endpoints (Beta)

As part of OpenID Connect authentication, Salesforce now supports the OAuth 2.0 dynamic client registration and token introspection endpoints. Dynamic client registration allows OpenID Connect client apps to automatically create child OAuth 2.0 connected apps with Salesforce. Token introspection enables client apps to check the current state of an OAuth 2.0 access or refresh token.

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

 **Note:** As a beta feature, the support of OAuth 2.0 dynamic client registration and token introspection endpoints 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 [Salesforce Identity Group](#) in the Trailblazer Community. For information about enabling this feature in your org, contact Salesforce.

How: This solution follows the [OAuth 2.0 Dynamic Client Registration Protocol](#) and the [OAuth 2.0 Token Introspection specification](#).

After configuring the OAuth 2.0 connected app, contact Salesforce to request an initial access token. Salesforce requires this token to authenticate the dynamic client registration request. For information about configuring these endpoints for Mulesoft Access Management, see [Mulesoft Anypoint](#).

 **Important:** The dynamic client registration and token introspection endpoints support the `login.salesforce.com` URL only after all instances are upgraded to the Winter '19 release. If you enable these endpoints before all instances are upgraded to Winter '19, use a My Domain, community, or instance URL.

SEE ALSO:

[Salesforce Help: Authenticate Apps with OAuth \(can be outdated or unavailable during release preview\)](#)

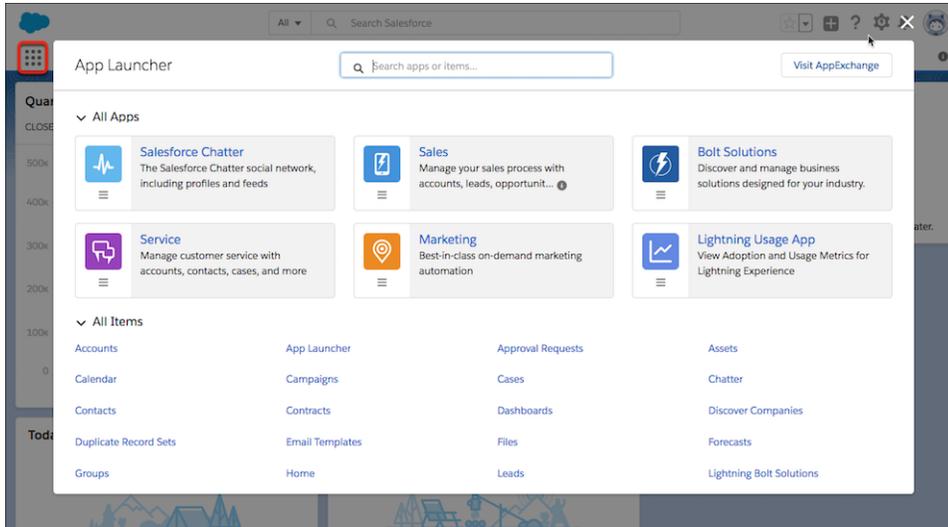
[REST API Developer Guide: Understanding OAuth Endpoints \(can be outdated or unavailable during release preview\)](#)

Get Improved Accessibility in the Lightning Experience App Launcher

With the accessibility redesign of the Lightning Experience App Launcher, your community members, customers, and other users get a better, more intuitive navigational experience. In addition, newly implemented Salesforce Lightning Design System (SLDS) standards enable screen readers to correctly announce the App Launcher cards and All Items section.

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

Why: The Lightning Experience App Launcher's redesign provides improved accessibility.



Use the REST API to Manage User Identities with SCIM 2.0

Salesforce now supports version 2.0 of System for Cross-Domain Identity Management (SCIM). SCIM is an open standard for exchanging user identity information across systems using the REST API. Salesforce provides extensions to the spec for Salesforce-specific identity information. SCIM makes it easier to manage user identities, especially for large companies that host thousands of apps and related servers and databases. Without a standard connection method, companies must write custom software connectors to join these services.

Where: This feature applies to Lightning Experience and Salesforce Classic in all editions.

How: We added these SCIM endpoints for Salesforce extensions, where `salesforce_org_url` is the org URL (such as a custom domain) for the user. An asterisk (*) indicates the endpoints that we added with SCIM 2.0.

- `https://salesforce_org_url/services/scim/v2/Users`
- `https://salesforce_org_url/services/scim/v2/Groups`
- `https://salesforce_org_url/services/scim/v2/Entitlements`
- `https://salesforce_org_url/services/scim/v2/Schemas`
- `https://salesforce_org_url/services/scim/v2/Roles*`
- `https://salesforce_org_url/services/scim/v2/ResourceTypes*`
- `https://salesforce_org_url/services/scim/v2/Me*`

You can request the capabilities of the Salesforce SCIM implementation using `https://salesforce_org_url/services/scim/v2/ServiceProviderConfigs`.

Request the properties of a specific user using `https://salesforce_org_url/services/scim/v1/Users/userID`, where `userId` is the user's 18-character org ID.

SEE ALSO:

[Salesforce Help: Use the System for Cross-Domain Identity Management \(SCIM\) \(can be outdated or unavailable during release preview\)](#)

Identify which User Session to Close During SAML Single Logout

Some identity providers and service providers require a session index parameter in the logout request or response to identify the user session to close. Salesforce now supports session index parameters with SAML single logout (SLO). When a user logs out of a connected app registered for SAML SLO, the session index parameter can help identify which user session to end.

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

How: When Salesforce is the identity provider, it generates and sends the session index parameter to the service provider during SAML single sign-on (SSO). Depending on the initiating provider, SAML SLO follows one of these processes.

- If Salesforce initiates SLO, it sends the same session index parameter with the logout request to the service provider.
- If the service provider initiates SLO, Salesforce sends the SAML SLO request to the other service providers participating in the current session. The other service providers post a logout response to Salesforce. Salesforce returns the logout response to the initiating service provider.

When Salesforce is the service provider, it receives and stores the session index parameter sent from the identity provider during SSO. If the identity provider initiates SLO, Salesforce sends a logout response. If Salesforce initiates the SLO, it sends the same session index parameter with the logout request to the identity provider.

Get JSON-Compliant Values in the UserInfo Endpoint, Identity URL Response, and ID Token

The `updated_at` attribute in the UserInfo endpoint, identity URL, and ID token now conforms to the OpenID Connect Core 1.0 specification. The `address` value in the ID token (if standard claims are enabled) also conforms to the specification.

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

Why: The `updated_at` value is a JSON number representing the number of seconds from 1970-01-01T0:0:0Z as measured in UTC until the date and time when the end user's information was last updated. For example, previously an `updated_at` attribute value looked like:

```
"updated_at" : "2017-07-28T19:17:41.000+0000"
```

Now the time value looks like:

```
"updated_at" : "2017-07-28T19:17:41z"
```

The ID token standard claims contain information about the user, such as the user's name, profile, phone number, and address. For example, previously an `address` attribute value looked like:

```
"address": "{street_address=null, locality=null, region=CA, country=US, postal_code=94110}"
```

Now the address looks like:

```
"address" : { "region" : "CA", "country" : "US", "postal_code" : "94110" }
```

SEE ALSO:

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

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

[Salesforce Help: Get and Verify an ID Token \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Create a Connected App \(can be outdated or unavailable during release preview\)](#)

Set Different Login Policies for Salesforce and Community Users (Generally Available)

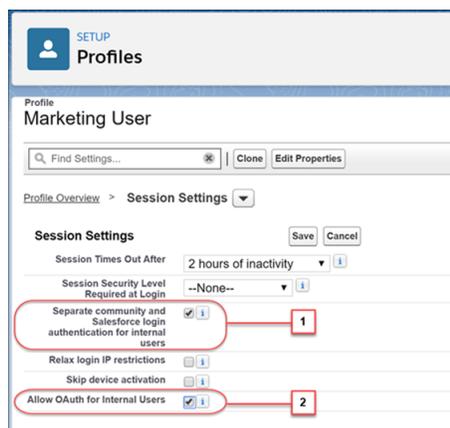
If you set up a community in your org, you can specify different login policies for internal users when they log in to a community instead of the Salesforce app. Also, OAuth authentication for internal users is now supported on community domains.

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

Why: For example, you can enforce IP restrictions for internal users logging in to a community, and relax 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.

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** (1). To set less restrictive login policies, select **Relax login IP restrictions** or **Skip device activation**, or both. To support authentication with OAuth for internal users who have **Separate community and Salesforce login authentication for internal users** enabled on their profile, select **Allow OAuth for Internal Users** (2).

 **Note:** 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:

[Salesforce Help: View and Edit Session Settings in Profiles \(can be outdated or unavailable during release preview\)](#)

Salesforce Shield: Encryption Scheme Availability Through the API, More Field Encryption, and Improved Transaction Policy Wizard

Create Transaction Security policies faster and easier with an improved UI. Encrypt even more data and manage more tenant secret rotation and encryption policy tasks through the API.

IN THIS SECTION:

[Shield Platform Encryption: More Fields to Encrypt and More API Support, New Cache-Only Key Service](#)

Shield Platform Encryption customers can encrypt a broader range of data and use more features to access encrypted data. We added encryption to many fields, including Custom Object Name and Health Cloud fields. You can update encryption schemes and your tenant secrets' status via Metadata API and REST API, respectively. And for the first time, you can use Bring Your Own Key's Cache-Only Key Service to fetch key material stored outside of Salesforce.

[Event Monitoring: Improved Transaction Policy Wizard and More Accurate Lightning Error Information](#)

Create Transaction Security policies faster and easier with an improved UI. The Lightning Error event type contains more relevant information to help you troubleshoot errors.

Shield Platform Encryption: More Fields to Encrypt and More API Support, New Cache-Only Key Service

Shield Platform Encryption customers can encrypt a broader range of data and use more features to access encrypted data. We added encryption to many fields, including Custom Object Name and Health Cloud fields. You can update encryption schemes and your tenant secrets' status via Metadata API and REST API, respectively. And for the first time, you can use Bring Your Own Key's Cache-Only Key Service to fetch key material stored outside of Salesforce.

IN THIS SECTION:

[Encrypt Custom Object Name Fields \(Generally Available\)](#)

Add an extra layer of protection to the data in your custom objects. Shield Platform Encryption for custom object name fields supports both deterministic and probabilistic encryption schemes.

[Welcome Shield Platform Encryption to Health Cloud](#)

If you work with patient data, we know you're careful about keeping that data safe. Now you can add an extra layer of protection to patient data stored in a wide range of fields in the Health Insurance Data Model and Utilization Management Data Model. Both of these data models are generally available in Spring '18.

[Encrypt Rich Text Area Fields \(Beta\)](#)

All Shield Platform Encryption can now encrypt 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.

[Encrypt Contract Shipping Address Fields](#)

You can encrypt the Contract Shipping Address field, extending another layer of protection to even more of your contract data. When you encrypt the Contract Shipping Address field, the Shipping Street and Shipping City fields are also encrypted.

[Improved Shield Key Management Service Protections](#)

New key limits help the Shield Key Management Service (KMS) handle key material more efficiently. You can now have up to 50 active and archived Salesforce-generated or customer-supplied tenant secrets of each type. Cache-Only Key Service (beta) customers can have up to 10 active and archived cache-only keys of each type. This service improvement protects against Shield KMS interruptions, ensuring smooth encryption and decryption processes.

[Record Encrypted Data with Change Data Capture](#)

Change Data Capture provides near-real-time changes of Salesforce records, enabling you to synchronize corresponding records in an external data store. If a Salesforce record field is encrypted with Shield Platform Encryption, changes to encrypted field values generate change events. With one click, you can use Shield Platform Encryption to encrypt change events. Data in change event messages is then delivered to the subscribed client over a secure transport layer (HTTPS and TLS).

[Control Who Can Change Encryption Policies](#)

Sometimes you want only certain individuals on your admin team to complete encryption tasks. If these tasks involve handling encryption key material and managing encryption policies, you can restrict encryption policy tasks to users with the Manage Encryption Keys permission.

[Apply Shield Platform Encryption with Change Sets](#)

Whoever said, "You can't take it with you" didn't use change sets. Now you can take your encryption settings with you when you deploy customizations from one org to another. You can also apply encryption to components that are already part of a change set. Your encryption settings are applied to the target org when your change set is uploaded to your target org.

[Update Tenant Secret Statuses and Schemes Through the API](#)

New API functionality gives you a flexible way to rotate your key material and keep it aligned with your encryption policy. In version 44.0 and later of the Enterprise API, you can destroy a tenant secret by updating the Status field instead of the SecretValue field. Cache-Only Key Service (beta) customers can activate new tenant secrets and mark archived tenant secrets as destroyed by updating the Status field. All Shield Platform Encryption customers can also view and set a field's encryption schemes via Metadata API with the new encryptionScheme enum. For example, update a field's encryption scheme from probabilistic to deterministic encryption by passing in the `CaseSensitiveDeterministicEncryption` value. The `encrypted` boolean has been deprecated in versions 44.0 and later.

[Retain More Control of Key Material with the Cache-Only Key Service \(Beta\)](#)

Built on Shield Platform Encryption's Bring Your Own Key service, the new Cache-Only Key Service addresses a unique need for non-persisted key material. You can store key material outside of Salesforce and have the Cache-Only Key Service fetch your key material on demand. Your key service transmits your key material over a secure channel that you configure. It's then encrypted and stored in the cache for immediate encrypt and decrypt operations. You can destroy and rotate key material on demand and track cache-only key events, giving you full control of your key material.

[Find Exact, Fuzzy Matches of Encrypted Data with Matching Rules \(Generally Available\)](#)

Shield Platform Encryption support for matching rules gives you fuzzy and exact matches, helping you maintain a broader range of your data. In addition to custom matching rules, you can reference encrypted fields with standard matching rules. This feature, which is now generally available, includes some changes since the beta release.

Encrypt Custom Object Name Fields (Generally Available)

Add an extra layer of protection to the data in your custom objects. Shield Platform Encryption for custom object name fields supports both deterministic and probabilistic encryption schemes.

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

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. Select **Encrypt the contents of this field**, and click **Save**.

Welcome Shield Platform Encryption to Health Cloud

If you work with patient data, we know you're careful about keeping that data safe. Now you can add an extra layer of protection to patient data stored in a wide range of fields in the Health Insurance Data Model and Utilization Management Data Model. Both of these data models are generally available in Spring '18.

Where: This feature applies to Salesforce Classic, Lightning Experience, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

Who: Administrators with the Health Cloud Platform permission set license can apply Shield Platform Encryption to Health Cloud fields.

Why: When you encrypt Health Cloud data with Shield Platform Encryption, you add strong encryption at rest to your patient's personal health data in these fields.

Care Request

- Admission Notes
- Disposition Notes
- Facility Record Number
- First Reviewer Notes

- Medical Director Notes
- Member First Name
- Member Last Name
- Member ID
- Member Group Number
- Resolution Notes
- Root Cause Notes

Care Request Drug

- Prescription Number

Coverage Benefit

- Benefit Notes
- Coinsurance Notes
- Copay Notes
- Deductible Notes
- Lifetime Maximum Notes
- Out-of-Pocket Notes
- Source System Identifier

Coverage Benefit Item

- Coverage Level
- Notes
- Service Type
- Service Type Code
- Source System Identifier

Member Plan

- Affiliation
- Group Number
- Issuer Number
- Member Number
- Primary Care Physician
- Source System Identifier

Purchaser Plan

- Plan Number
- Service Type
- Source System
- Source System Identifier

Purchaser Plan Association

- Purchaser Plan Association ID
- Status
- Source System

- Source System Identifier

How: Encrypt these fields from the Encryption Policy page in Setup. You can apply either probabilistic or deterministic encryption scheme to your data on a field-by-field basis.

SEE ALSO:

[Protect Health Cloud Data with Platform Encryption](#)

[Salesforce Help: Which Standard Fields and Data Elements Can I Encrypt? \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Filter Encrypted Data with Deterministic Encryption \(can be outdated or unavailable during release preview\)](#)

Encrypt Rich Text Area Fields (Beta)

All Shield Platform Encryption can now encrypt 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 feature applies to Salesforce Classic, Lightning Experience, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.



Note: As a beta feature, Shield Platform Encryption for Rich Text Area 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 Rich Text Area in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Who: To use encryption for rich text area fields, 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** or **Edit**, and select **Encrypted** on the field detail page.

SEE ALSO:

[Salesforce Help: Encrypt Fields on Custom Objects and Custom Fields \(can be outdated or unavailable during release preview\)](#)

Encrypt Contract Shipping Address Fields

You can encrypt the Contract Shipping Address field, extending another layer of protection to even more of your contract data. When you encrypt the Contract Shipping Address field, the Shipping Street and Shipping City fields are also encrypted.

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

How: Apply encryption to the Contract Shipping Address field on the Encryption Policy page in Setup. You can apply probabilistic or deterministic encryption.

SEE ALSO:

[Salesforce Help: Filter Encrypted Data with Deterministic Encryption \(can be outdated or unavailable during release preview\)](#)

Improved Shield Key Management Service Protections

New key limits help the Shield Key Management Service (KMS) handle key material more efficiently. You can now have up to 50 active and archived Salesforce-generated or customer-supplied tenant secrets of each type. Cache-Only Key Service (beta) customers can have up to 10 active and archived cache-only keys of each type. This service improvement protects against Shield KMS interruptions, ensuring smooth encryption and decryption processes.

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

How: Most customers won't hit this new key limit. If you do, destroy an existing key so that you can create, upload, reactivate, rearchive, or create a callout to another one. Remember to synchronize the data with an active key before destroying key material.

SEE ALSO:

[Salesforce Help: Rotate Your Encryption Tenant Secrets \(can be outdated or unavailable during release preview\)](#)

Record Encrypted Data with Change Data Capture

Change Data Capture provides near-real-time changes of Salesforce records, enabling you to synchronize corresponding records in an external data store. If a Salesforce record field is encrypted with Shield Platform Encryption, changes to encrypted field values generate change events. With one click, you can use Shield Platform Encryption to encrypt change events. Data in change event messages is then delivered to the subscribed client over a secure transport layer (HTTPS and TLS).

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

When: Change Data Capture is generally available as of January 15, 2019.

How: Navigate to the Key Management page in Setup. In the Choose Tenant Secret Type dropdown list, select **Event Bus**.

Then navigate to the Encryption Policy page in Setup, and select **Encrypt and deliver Change Data Capture events**. From now on, your change events are encrypted and delivered to the subscribed client.

SEE ALSO:

[Keep Your External Data Up to Date with Change Data Capture \(Generally Available\)](#)

Control Who Can Change Encryption Policies

Sometimes you want only certain individuals on your admin team to complete encryption tasks. If these tasks involve handling encryption key material and managing encryption policies, you can restrict encryption policy tasks to users with the Manage Encryption Keys permission.

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

Who: To restrict access, you need the Manage Encryption Keys permission.

Why: The Advanced Settings page has one setting to specify which security admins can handle encryption tasks, and which can continue to focus on other security-related admin jobs. You don't have to touch the permission sets and role assignments that you spent so much time and effort on.

How: From Setup, enter *Platform Encryption* in the Quick Find box, and click **Advanced Settings**. Then select **Restrict Access to Encryption Policy Settings**.

SEE ALSO:

[Salesforce Help: Which User Permissions Does Shield Platform Encryption Require? \(can be outdated or unavailable during release preview\)](#)

Apply Shield Platform Encryption with Change Sets

Whoever said, "You can't take it with you" didn't use change sets. Now you can take your encryption settings with you when you deploy customizations from one org to another. You can also apply encryption to components that are already part of a change set. Your encryption settings are applied to the target org when your change set is uploaded to your target org.

Where: This feature applies to Salesforce Classic, Lightning Experience, and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions.

Who: To use outbound change sets and edit deployment connections, you need the Create and Upload Change Sets, Deploy Change Sets, and Modify All Data permissions.

Why: Most customers try Shield Platform Encryption features in a sandbox before using them in production orgs. Whether you're moving your customizations from a sandbox to a production org, or from one production org to another, change set components that take encryption keep their encryption settings in the target org. Custom fields, field sets, and matching rules also keep their encryption settings.

SEE ALSO:

[Salesforce Help: Components Available in Change Sets \(can be outdated or unavailable during release preview\)](#)

Update Tenant Secret Statuses and Schemes Through the API

New API functionality gives you a flexible way to rotate your key material and keep it aligned with your encryption policy. In version 44.0 and later of the Enterprise API, you can destroy a tenant secret by updating the Status field instead of the SecretValue field. Cache-Only Key Service (beta) customers can activate new tenant secrets and mark archived tenant secrets as destroyed by updating the Status field. All Shield Platform Encryption customers can also view and set a field's encryption schemes via Metadata API with the new encryptionScheme enum. For example, update a field's encryption scheme from probabilistic to deterministic encryption by passing in the `CaseSensitiveDeterministicEncryption` value. The `encrypted` boolean has been deprecated in versions 44.0 and later.

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

SEE ALSO:

[Changed Objects](#)

[Metadata API](#)

[Metadata API Developer Guide: CustomField](#)

[SOAP API Developer Guide: Standard Objects: Tenant Secret \(can be outdated or unavailable during release preview\)](#)

Retain More Control of Key Material with the Cache-Only Key Service (Beta)

Built on Shield Platform Encryption's Bring Your Own Key service, the new Cache-Only Key Service addresses a unique need for non-persisted key material. You can store key material outside of Salesforce and have the Cache-Only Key Service fetch your key material on demand. Your key service transmits your key material over a secure channel that you configure. It's then encrypted and stored in the cache for immediate encrypt and decrypt operations. You can destroy and rotate key material on demand and track cache-only key events, giving you full control of your key material.

Where: This feature applies to Salesforce Classic, Lightning Experience, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, and Developer editions.

Note: As a beta feature, Shield Platform Encryption Cache-Only Key Service 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 Cache-Only Key Service in the [IdeaExchange](#) and through the [Trailblazer Community](#). For information about enabling this feature in your organization, contact Salesforce.

Why: Take even more control over the chain of custody of your key material with the Cache-Only Key Service. Cache-only keys aren't persisted in any Salesforce system of record or backups. Instead, the service fetches key material from an on-premises key service, cloud-based key service, or cloud-based key brokering vendor of your choice. When your key material is fetched, it's encrypted and stored in the cache for encrypt and decrypt operations.

How: Creating and hosting cache-compatible keys requires some setup in and outside of Salesforce. After you generate and prepare your key material, you create a named credential to use as a secure channel by which the service fetches the key material. You then configure your connection from the Key Management page in Setup.

Manage Certificates Create Self-Signed Certificate Create CA-Signed Certificate

Choose Certificate: certificate1 Download Certificate

Certificate Details			
Name	certificate1	Unique Name	certificate1
Created Date	3/30/2018 2:05 PM	Expiration Date	3/30/2020 5:00 AM
Key Size	4096		

Upload Key Material Use a Cache-Only Key

Use a Cache-Only Key Save

Unique Key Identifier: Named Credential: Named Credential

Because your key material is stored outside of Salesforce, it's important to maintain a functional callout connection. Use the Callout Check page to monitor your connection and quickly respond to key service interruptions that could prevent the service from fetching your keys.

From the Key Management page in Setup, click **Details** next to your cache-only key. Click **Check** (1), and review the details about your connection (2). You can then make the appropriate adjustments to your key service.

Cache-Only Key: Callout Check [Help for this Page](#)

Review and check your cache-only key callout connection. Callout test results aren't saved or logged in Salesforce.

Callout Connection Details

Unique Key Identifier	123456	Named Credential	Named_Credential
Certificate Unique Name	certificate1		

Start a callout connection check to see results. **Check** **1**

Testing callout connection for

Organization ID: 00DR0000009Ff3
 Tenant Secret ID: 02GR00000001ITm
 Unique Key Identifier: 123456
 Named Credential: Named_Credential
 Certificate Unique Name: certificate1

The callout was successful. **2**

SEE ALSO:

[Salesforce Help: Cache-Only Key Service \(can be outdated or unavailable during release preview\)](#)

[SOAP API Developer Guide: Standard Objects: RemoteKeyCalloutEvent \(Beta\)](#)

Find Exact, Fuzzy Matches of Encrypted Data with Matching Rules (Generally Available)

Shield Platform Encryption support for matching rules gives you fuzzy and exact matches, helping you maintain a broader range of your data. In addition to custom matching rules, you can reference encrypted fields with standard matching rules. This feature, which is now generally available, includes some changes since the beta release.

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

Important: To ensure accurate matching results, customers who used the beta version of this feature 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.

How: Activate deterministic encryption on the Platform Encryption Advanced Settings page. Then 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.

Changes Since Summer '18

New service protections ensure that loads are balanced across the system. The matching service searches for match candidates until it finds all matches or up to 200 matches. With Platform Encryption, the service search maximum is 100 candidates. With encryption, you could find fewer or no possible duplicate records.

SEE ALSO:

[Salesforce Help: Apply Encryption to Fields Used in Matching Rules \(can be outdated or unavailable during release preview\)](#)

Event Monitoring: Improved Transaction Policy Wizard and More Accurate Lightning Error Information

Create Transaction Security policies faster and easier with an improved UI. The Lightning Error event type contains more relevant information to help you troubleshoot errors.

IN THIS SECTION:

[Create Transaction Policies Faster and Easier with Updated Wizard](#)

You can now use a more intuitive wizard to create transaction security policies in both Lightning Experience and Salesforce Classic. Previously, the wizard was only available in Lightning Experience. We also improved the usability of the Transaction Security Policies page to help you maintain your policies quickly and easily.

[Track Analytics Dashboard Requests in Your Event Log Files](#)

You can now track adoption of Einstein Analytics in your Salesforce org. With new fields in the Wave Change event type, you can see where Analytics dashboard requests originate.

[Work More Efficiently with the New Event Monitoring Setup Tree and Renamed Items](#)

To make Event Monitoring and Transaction Security easier to find in Setup, we've grouped them under an Event Monitoring item in the Setup tree. We renamed the Event Monitoring Setup page to Event Monitoring Settings. The Transaction Security page is now named Transaction Security Policies.

[Get More Accurate Information in Lightning Error Logs](#)

Unrelated information is now filtered out of the Lightning Error event logs. Previously, some Lightning error events were not related to an actual error, giving the incorrect perception that something went wrong. You may see a decrease in your Lightning Error event log volume due to this optimization.

[Einstein Analytics Classic Designer Dashboards Are Retiring](#)

With Classic Designer Dashboards retiring soon, now is the time to convert your Event Monitoring Classic Designer Dashboards to Dashboard Designer. If you've installed or updated the Event Monitoring Analytics app since the Summer '17 release (template version 40 and later), you don't need to do anything. If you are using an earlier version, please upgrade your app.

Create Transaction Policies Faster and Easier with Updated Wizard

You can now use a more intuitive wizard to create transaction security policies in both Lightning Experience and Salesforce Classic. Previously, the wizard was only available in Lightning Experience. We also improved the usability of the Transaction Security Policies page to help you maintain your policies quickly and easily.

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

Who: Available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions. To create and manage transaction policies, you must have the Customize Application user permission.

How: From Setup, enter *Transaction Security* in the Quick Find box, then select **Transaction Security Policies**. To create a policy, click **New**. To update a policy, click the dropdown menu on the right, and select **Edit**.

NAME	TYPE	EVENT (RESOURCE)	APEX CONDITION	ACTION	STATUS
Concurrent User Session Limit Policy	Apex	Login (Login History)	ConcurrentSessionsPolicyCondition	End a session to log in, Email notification, In-App notification	Disabled <input type="button" value="v"/>
Lead Data Export Policy	Apex	Data Export (Lead)	DataLoaderLeadExportCondition	Block, Email notification, In-App notification	Disabled <input type="button" value="v"/>
Notify Admin on Login	Condition Builder	Login Event		Email notification	Enabled <input type="button" value="v"/>

Important: If you're participating in the Real-Time Events pilot, you can't create Apex policies or edit disabled Apex policies for events that are supported in the pilot.

SEE ALSO:

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

Track Analytics Dashboard Requests in Your Event Log Files

You can now track adoption of Einstein Analytics in your Salesforce org. With new fields in the Wave Change event type, you can see where Analytics dashboard requests originate.

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, Unlimited, and Developer editions.

How: If you're an Event Monitoring customer, you automatically get these fields in event log data when your users work in Analytics. For field details, see EventLogFile in [Changed Objects](#).

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: Wave Change Event Type \(can be outdated or unavailable during release preview\)](#)

Work More Efficiently with the New Event Monitoring Setup Tree and Renamed Items

To make Event Monitoring and Transaction Security easier to find in Setup, we've grouped them under an Event Monitoring item in the Setup tree. We renamed the Event Monitoring Setup page to Event Monitoring Settings. The Transaction Security page is now named Transaction Security Policies.

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

Who: Available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: From Setup, enter *Event Monitoring* in the Quick Find box, then select **Event Monitoring Settings** or **Transaction Security Policies**.



Get More Accurate Information in Lightning Error Logs

Unrelated information is now filtered out of the Lightning Error event logs. Previously, some Lightning error events were not related to an actual error, giving the incorrect perception that something went wrong. You may see a decrease in your Lightning Error event log volume due to this optimization.

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

SEE ALSO:

[Object Reference for Salesforce and Lightning Platform: Lightning Error Event Type \(can be outdated or unavailable during release preview\)](#)

Einstein Analytics Classic Designer Dashboards Are Retiring

With Classic Designer Dashboards retiring soon, now is the time to convert your Event Monitoring Classic Designer Dashboards to Dashboard Designer. If you've installed or updated the Event Monitoring Analytics app since the Summer '17 release (template version 40 and later), you don't need to do anything. If you are using an earlier version, please upgrade your app.

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.

When: We plan to retire Classic Designer Dashboards in Summer '19.

SEE ALSO:

[Plan for Classic Designer's Retirement](#)

[Salesforce Help: Upgrade the Event Monitoring Analytics App](#)

[Salesforce Help: Convert Your Classic Designer Dashboard to Dashboard Designer \(can be outdated or unavailable during release preview\)](#)

Other Security Changes: Platform Integration User Tracking, Alerts to Warn Users Before Redirect, and Sharing Access Management

The Platform Integration User is now traceable in the debug logs, giving you more visibility into this automated user. Protect against phishing and malicious links by warning users before they are redirected out of Salesforce. Restrict who has access to sharing settings by requiring a high-assurance session level.

IN THIS SECTION:

[Track the Platform Integration User](#)

Many internal Salesforce applications now automatically run their business processes as the Platform Integration User. Some records show as being created, last modified, or owned by this user. Using the Platform Integration User is an expected part of how Salesforce maintains an org, much like the Automated Process user. The Platform Integration User is traceable in the debug logs.

[Manage Sharing Access with a Session Security Policy](#)

You can now require that users have a high-assurance session level before allowing them to access sharing settings. The new Manage Sharing setting restricts access to the Sharing Settings Setup page, the SharingRules object, and the CustomObject's sharingModel field in Metadata API.

[Warn Users When Links Redirect Outside of Salesforce](#)

Protect your users from malicious links and phishing. Alert them with a warning message when they click links that take them outside the Salesforce domain.

[Update Your Server Cipher Suite to Support AES](#)

Salesforce no longer supports the 3DES cipher for outbound HTTPS calls. Check your servers' cipher suite lists and ensure that they support the advanced encryption standard (AES) with 128-bit (AES128) or 256-bit (AES256) stream keys. Otherwise, custom code that relies on outbound calls to the HTTPS server fails.

[Opt Out of Instanceless My Domain URLs](#)

To stabilize the hostname for My Domain URLs, all orgs created after Winter '19 default to using URLs without instance names. However, some older plug-in packages from AppExchange aren't yet compatible with instanceless hostnames. If you have page functionality issues while using packages, deactivate the critical update that enabled instanceless My Domain URLs.

Track the Platform Integration User

Many internal Salesforce applications now automatically run their business processes as the Platform Integration User. Some records show as being created, last modified, or owned by this user. Using the Platform Integration User is an expected part of how Salesforce maintains an org, much like the Automated Process user. The Platform Integration User is traceable in the debug logs.

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

Why: The Platform Integration User works behind the scenes integrating internal applications. Here are some examples that result in the Platform Integration User showing up in audit fields.

- An Einstein bot creates a case.
- Einstein writes prediction data to records that it is evaluating.
- Data is synchronized using the Salesforce Integration Cloud.

How: To track the Platform Integration User in the debug logs, create a user trace flag, and select **Platform Integration** from the Traced Entity Type dropdown list. A trace flag is now set on the Platform Integration User.

Manage Sharing Access with a Session Security Policy

You can now require that users have a high-assurance session level before allowing them to access sharing settings. The new Manage Sharing setting restricts access to the Sharing Settings Setup page, the SharingRules object, and the CustomObject's sharingModel field in Metadata API.

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

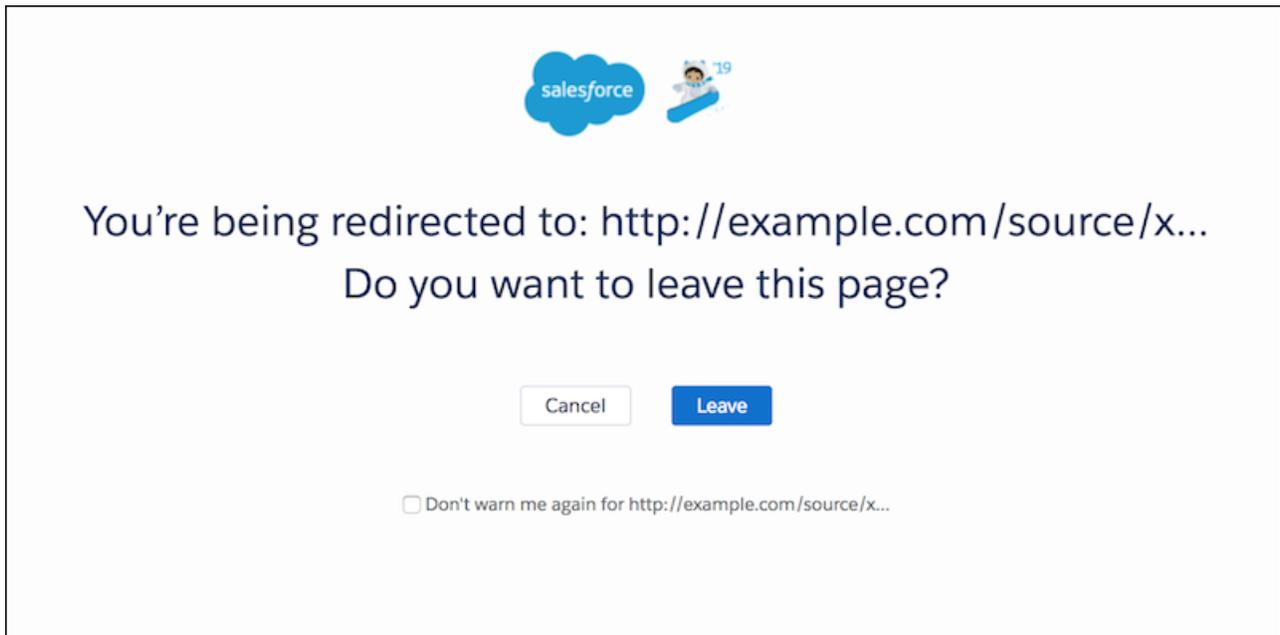
How: From Setup, enter *Identity Verification* in the Quick Find box, then select **Identity Verification**. Locate the Session Security Level Policies section, and update the Manage Sharing setting.

Warn Users When Links Redirect Outside of Salesforce

Protect your users from malicious links and phishing. Alert them with a warning message when they click links that take them outside the Salesforce domain.

Where: This feature is available in Salesforce Classic in all editions.

Why: For instance, users see a warning message if they click a link to a company's website on an account record.



This setting applies to all links in Salesforce, except for links in Chatter.

How: In Setup, search for *Session Settings*. Under Redirections, select **Warn users before they are redirected outside of Salesforce**.

Update Your Server Cipher Suite to Support AES

Salesforce no longer supports the 3DES cipher for outbound HTTPS calls. Check your servers' cipher suite lists and ensure that they support the advanced encryption standard (AES) with 128-bit (AES128) or 256-bit (AES256) stream keys. Otherwise, custom code that relies on outbound calls to the HTTPS server fails.

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

How: Test for server compatibility in a sandbox org that is upgraded to Winter '19. Generally, servers that support TLS 1.1 or later also support AES128 or AES256.

SEE ALSO:

[Salesforce Help: Supported Cipher Suites \(can be outdated or unavailable during release preview\)](#)

[Knowledge Article: Salesforce Disabling TLS 1.0](#)

Opt Out of Instanceless My Domain URLs

To stabilize the hostname for My Domain URLs, all orgs created after Winter '19 default to using URLs without instance names. However, some older plug-in packages from AppExchange aren't yet compatible with instanceless hostnames. If you have page functionality issues while using packages, deactivate the critical update that enabled instanceless My Domain URLs.

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

When: These critical updates will be automatically activated on March 16, 2019.

How: From Setup, enter *Critical Updates* in the Quick Find box, and then select **Critical Updates**. For Remove Instance Names From URLs for Visualforce, Community Builder, Site.com Studio, and Content Files, click **Deactivate**.

You can also opt out of instanceless URLs for sandbox orgs. For Stabilize the Hostname for My Domain URLs in Sandboxes, click **Deactivate**.

SEE ALSO:

[Salesforce Spring '18 Release Notes: Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

[Salesforce Summer '18 Release Notes: Stabilize the Hostname for My Domain URLs in Sandboxes \(Critical Update\)](#)

Salesforce IoT: IoT Insights Lightning Component, Event Sender, Event Viewer, and Context Improvements

Salesforce IoT has innovations to help you create unique and memorable customer experiences. You can add your Salesforce IoT data on any page in Salesforce with our new IoT Insights Lightning component. New troubleshooting features let you send event messages inside the app and view the messages as they are received. We're also making contexts easier to use and improving trackers.

IN THIS SECTION:

[Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights](#)

Make your Salesforce IoT data available to your users throughout Salesforce, giving them more information to serve customers. The IoT Insights Lightning standard component enhances your CRM data by showing Salesforce IoT information alongside it. You can include the component on Salesforce Lightning record pages, such as cases, work orders, and assets.

[Easily Send Event Messages from Inside Salesforce IoT](#)

Event Sender simplifies the process of sending platform event messages from within Salesforce IoT. You can also more easily test the orchestrations that you build without using an external tool to send event messages.

[Verify That Event Messages Are Received with Event Viewer](#)

Use Event Viewer early in the process of creating contexts to verify that your event messages are being sent to the right context or to troubleshoot problems. Check that all the required event data is also coming through so that you can start creating your orchestrations. Event Viewer shows the details of each event message such as its fields and values.

[Create and Manage Contexts Better with Validation and Activation Enhancements](#)

When you create a context or change an existing one, your context goes through a validation step during the activation process while concurrently validating against activated orchestrations. If your context isn't compatible with your orchestration, detailed error messages help you understand the issues.

Get More Troubleshooting Data with the Enhanced Activity Log

New activity log types give you greater visibility into more types of issues, helping you solve more problems and keep your orchestrations running as planned. You can see events that were dropped due to exceeding daily event and instance allocations, unknown errors, or events with errors in output actions. We also added a log type filter and made improvements to search.

Include IoT Components in a Managed Package

Incorporate Salesforce IoT in your packaging and make it easier to connect to partner IoT platforms using both code and custom views for authentication. You can create sample contexts and orchestrations to validate connections to Salesforce IoT. Use the IoT Metadata API to create context and orchestration templates.

Show Your Salesforce IoT Data Anywhere in Salesforce with IoT Insights

Make your Salesforce IoT data available to your users throughout Salesforce, giving them more information to serve customers. The IoT Insights Lightning standard component enhances your CRM data by showing Salesforce IoT information alongside it. You can include the component on Salesforce Lightning record pages, such as cases, work orders, and assets.

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

Who: You must have a Salesforce IoT license. Any user who has access to the parent record can view the data in the IoT Insights component.

Why: Give your users access to Salesforce IoT data from any Lightning record page in Salesforce.

The screenshot shows a Salesforce Lightning record page for an Asset named "1kW Solar Panel - SEL-4GVG4FNL". The page includes a feed on the left, a details section in the middle, and an IoT Insights component on the right. The IoT Insights component displays the following information:

- Current State Panel Monitoring:** Installed (green indicator), Jun 19, 2018, 3:59 PM
- Power Output:** 2
- Air Temperature:** 81 C

You can also add Salesforce IoT data to your community using the IoT Insights component in the Community Builder. Customers can view information about their own connected devices, and partners can access Salesforce IoT device data to better service your customers. This component is available only for record pages and is available only in English.

How: From Setup, enter *IoT* in the Quick Find box, then select **Get Started**. In Enable Salesforce IoT, click **Enable**. In Enable IoT Insights, click **Enable**.

To show Salesforce IoT data in the IoT Insights Lightning component, create and activate an orchestration with your desired variables. Add the IoT Insights component through the Lightning App Builder or the Lightning Community Builder.

Easily Send Event Messages from Inside Salesforce IoT

Event Sender simplifies the process of sending platform event messages from within Salesforce IoT. You can also more easily test the orchestrations that you build without using an external tool to send event messages.

Where: This change applies to Lightning Experience. Event Sender is available in Enterprise, Performance, Unlimited, and Developer editions.

Why: Tired of having to use an external tool, such as Postman or Workbench, to send an event message for testing your orchestrations? With Event Sender, there's an easier way. While you're still in Salesforce IoT, click **Event Sender**, send your event message, and watch it come into your orchestration.

Your event message is sent to all orchestrations attached to a context, not just the orchestration you're in.

How: From Setup, enter *IoT* in the Quick Find box, then select **Orchestrations**. Select the orchestration you want to send an event message to, and click  .

Verify That Event Messages Are Received with Event Viewer

Use Event Viewer early in the process of creating contexts to verify that your event messages are being sent to the right context or to troubleshoot problems. Check that all the required event data is also coming through so that you can start creating your orchestrations. Event Viewer shows the details of each event message such as its fields and values.

Where: This change applies to Lightning Experience. Event Viewer is available in Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, enter *IoT* in the Quick Find box, then select **Contexts**. Select the context you want to view event messages in, and click  .

Create and Manage Contexts Better with Validation and Activation Enhancements

When you create a context or change an existing one, your context goes through a validation step during the activation process while concurrently validating against activated orchestrations. If your context isn't compatible with your orchestration, detailed error messages help you understand the issues.

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

Why: Get more visibility into how changes to contexts affect related orchestrations. Save time when you create contexts with these enhancements.

- Get notified when changes could cause conflicts with orchestrations.
- Save draft contexts in progress at any time—even contexts with validation errors—and come back to them later.
- Quickly and easily do a final validation and go live with your context changes in one step. You can even activate all the new versions of the activated orchestrations attached to the context at the same time.
- View draft and active context versions separately, which makes it easy to distinguish the activated contexts from your work in progress.

Get More Troubleshooting Data with the Enhanced Activity Log

New activity log types give you greater visibility into more types of issues, helping you solve more problems and keep your orchestrations running as planned. You can see events that were dropped due to exceeding daily event and instance allocations, unknown errors, or events with errors in output actions. We also added a log type filter and made improvements to search.

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

How: From Setup, enter `IoT` in the Quick Find box. Select **Activity Log**.

Include IoT Components in a Managed Package

Incorporate Salesforce IoT in your packaging and make it easier to connect to partner IoT platforms using both code and custom views for authentication. You can create sample contexts and orchestrations to validate connections to Salesforce IoT. Use the IoT Metadata API to create context and orchestration templates.

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

Development: Create Your Own Salesforce App

Whether you're using Lightning components, Visualforce, Apex, or our APIs with your favorite programming language, these enhancements to the Salesforce Platform help you develop amazing applications, integrations, and packages for resale to other organizations.

IN THIS SECTION:

[Lightning Components: More Flexible CSP Enablement, and Settings for Faster Load Time and Improved Security](#)

The "Stricter Content Security Policy" is now an org setting instead of a critical update to give you greater control over its enablement. Freeze JavaScript prototypes for improved security and stability. Enable the CDN setting in Setup to load Lightning Experience faster.

[Visualforce: Field Sets in Lightning Experience and New Access Metrics](#)

Now you can create and edit field sets in Lightning Experience. We added new access metrics to help you decide which Visualforce pages to migrate to Lightning Experience.

[Apex](#)

Batch Apex classes can now opt in to fire platform events when encountering an error or exception. Apex introduces `inherited sharing` on Apex classes, which allows the class to run in the sharing mode of the class that called it. A new `System.Url.getOrgDomainUrl()` method enables you to get endpoints for API calls so you can interact with Salesforce REST and SOAP APIs in Apex code. A new `Callable` interface lets you write code that other developers can build upon, even if their code is in a different package.

[Metadata](#)

The Metadata Coverage report has been enhanced and can be accessed from a new location. The Modify Metadata perm (Beta) enables users to deploy all metadata, including Apex. You can use the Metadata REST API with all deployments, either via the new REST resource or via the Salesforce CLI. Access more metadata types and Tooling API objects in API version 44.0.

[API](#)

Enjoy greater programmatic access to Salesforce in API version 44.0.

[Custom Metadata Types: Storing Formula Parameters to Consolidate Updates, Editing Records in Memory Within Apex](#)

Reference records of custom metadata types in formula fields to avoid hardcoding and make updates easier. Create and edit custom metadata type records in memory in Apex to make testing easier.

[Salesforce Extensions for VS Code: Development and Live Debugging Simulations for Any Org, and New Apex Test View](#)

In addition to the changes we've made in weekly releases, Salesforce Extensions for VS Code v44 includes some major enhancements. Simulate a live debugging session in any org with Replay Debugger. Connect to sandboxes and production orgs to retrieve and deploy source. And explore a new Apex test view. These features are available when Salesforce Extensions for VS Code v44 is released on October 13, 2018, and some functionality is available sooner.

[Salesforce CLI: Join the Evolution](#)

The Salesforce command-line interface (CLI) continues to evolve with more features and commands that support the Salesforce DX development models. Use it 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 v44 is released on October 13, 2018.

[Sandboxes: Asset Files in Full Sandboxes](#)

Asset files are included in full sandbox copies, so you can test your branding images and reproduce the look and feel of your communities.

[Dev Hub: Now Available in Developer Edition and Trial Orgs](#)

You asked for it, and we delivered! Dev Hub is now available in trial orgs and Developer Edition orgs to try out scratch orgs and second-generation packaging.

[Scratch Orgs: More Features and Supported Metadata Types](#)

Designed to be ephemeral and easily recreated, scratch orgs are dedicated and configurable Salesforce environments that you can quickly spin up for many different purposes. They can be your own personal development environment, or you can create headless scratch orgs for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or have a trial Dev Hub org.

[Packaging: Unlocked Packages Generally Available](#)

The generally available version has enhanced unlocked packages, including support for patch version numbers, extracting package dependency information, moving metadata between unlocked packages, and managing deprecated metadata.

[Enterprise Messaging: High-Volume Platform Events \(Generally Available\), New Lightning Component, and Change Data Capture \(Generally Available\)](#)

Use events to simplify communication between business systems. This release includes enhancements for High-Volume Platform Events (Generally Available), such as usage-based entitlements and the `empApi` Lightning component, and Change Data Capture (Generally Available).

Lightning Components: More Flexible CSP Enablement, and Settings for Faster Load Time and Improved Security

The "Stricter Content Security Policy" is now an org setting instead of a critical update to give you greater control over its enablement. Freeze JavaScript prototypes for improved security and stability. Enable the CDN setting in Setup to load Lightning Experience faster.

For more information, refer to the [Lightning Components Developer Guide](#).

IN THIS SECTION:

[Stricter Content Security Policy \(CSP\) Changed from a Critical Update to an Org Setting](#)

This setting enables Stricter Content Security Policy (CSP), which prohibits the use of `unsafe-inline` for `script-src` to mitigate the risk of cross-site scripting attacks. In the previous release, stricter CSP was controlled by the "Enable Stricter Content Security Policy for Lightning Components" critical update. We changed the critical update to an org setting to give you greater control over its enablement.

Freeze JavaScript Prototypes for Improved Security and Stability

In JavaScript, each object has a prototype object. An object inherits methods and properties from its prototype object. Prototypes are shared between all objects of the same type. If a component author modifies a JavaScript prototype of a shared object, it can introduce unexpected behavior and potential security issues. Freezing JavaScript prototypes prevents Lightning component authors from modifying JavaScript prototypes of global objects that are shared between namespaces. This restriction enables better code separation between components and prevents malicious or inadvertent tampering of shared objects, such as the JavaScript APIs or DOM APIs.

Enable CDN to Load Lightning Experience Faster

Load Lightning Experience and other apps faster by enabling Akamai's content delivery network (CDN) to serve the static content for Lightning Component framework. A CDN generally speeds up page load time, but it also changes the source domain that serves the files. If your company has IP range restrictions for content served from Salesforce, test thoroughly before enabling this setting.

Mark Apex Methods as Cacheable

Mark an Apex method as storable (cacheable) instead of using `setStorable()` on every JavaScript action that calls the Apex method to centralize your caching notation for a method in the Apex class.

Token Changes for Formatting Dates in JavaScript API Methods

To improve performance and simplify the code, we changed the supported tokens for formatting dates in JavaScript API methods, such as `formatDate()`, in the `AuraLocalizationService` object.

Locker API Viewer in the Component Library

You can now access the Locker API Viewer in the Component Library. Previously, you had to navigate to a separate site to view the API Viewer. We're centralizing reference information and tools in the Component Library for your convenience.

Evaluate and Benchmark JavaScript Code with Locker Console

Use Locker Console to check your JavaScript code's compatibility with Locker Service, and compare how it runs with Locker Service enabled and disabled. Access Locker Console in the Component Library.

Removed moment Global Variable

The Lightning Component framework uses the Moment.js library as part of its internal implementation. Prior to Winter '19, customers could access the `moment` global variable that's part of Moment.js. This usage of `moment` in custom Lightning components was never intentional or supported. In Winter '19, we blocked access to the `moment` variable. To use Moment.js, you must upload it as a static resource in your org.

Use Lightning Data Service in More Containers

You can now use Lightning components built on Lightning Data Service in containers other than Lightning Experience and the Salesforce app.

New and Changed Lightning Components

Build user interfaces quickly with a bevy of new components.

Changed Lightning Interfaces

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

Stricter Content Security Policy (CSP) Changed from a Critical Update to an Org Setting

This setting enables Stricter Content Security Policy (CSP), which prohibits the use of `unsafe-inline` for `script-src` to mitigate the risk of cross-site scripting attacks. In the previous release, stricter CSP was controlled by the "Enable Stricter Content Security Policy for Lightning Components" critical update. We changed the critical update to an org setting to give you greater control over its enablement.

Where: This setting enables stricter CSP for:

- Lightning Experience
- Salesforce app

- Standalone apps that you create (for example, `myApp.app`)

This setting doesn't affect:

- Salesforce Classic
- Any apps for Salesforce Classic, such as Salesforce Console in Salesforce Classic
- Communities
- Lightning Out, which allows you to run Lightning components in a container outside of Lightning apps, such as Lightning components in Visualforce and Visualforce-based Communities. The container defines the CSP rules.

Why: The setting enables you to continue to work with third-party libraries that use `unsafe-inline` for `script-src`. When the setting is enabled, you can't use code that loads JavaScript with `script` tags, or event handlers that use inline JavaScript. For example, this code is not allowed.

```
<button onclick="doSomething()"></button>
```

How: This setting is automatically enabled, except if your org matches any of these criteria:

- You've created a custom Lightning component
- You've installed a package that contains a Lightning component

To disable stricter CSP:

1. From Setup, enter `Session` in the `Quick Find` box, and then select **Session Settings**.
2. Deselect **Enable Stricter Content Security Policy**.
3. Click **Save**.

Freeze JavaScript Prototypes for Improved Security and Stability

In JavaScript, each object has a prototype object. An object inherits methods and properties from its prototype object. Prototypes are shared between all objects of the same type. If a component author modifies a JavaScript prototype of a shared object, it can introduce unexpected behavior and potential security issues. Freezing JavaScript prototypes prevents Lightning component authors from modifying JavaScript prototypes of global objects that are shared between namespaces. This restriction enables better code separation between components and prevents malicious or inadvertent tampering of shared objects, such as the JavaScript APIs or DOM APIs.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the app.

How: This setting is disabled by default for new and existing orgs. To freeze JavaScript prototypes, from Setup, enter `Session` in the `Quick Find` box, and then select **Session Settings**. Select **Freeze JavaScript Prototypes** and click **Save**.

 **Note:** Cisco Webex Teams and Meetings features aren't compatible with the Freeze JavaScript Prototypes setting. If you have one of these Webex features enabled, you can't enable this setting.

Enable CDN to Load Lightning Experience Faster

Load Lightning Experience and other apps faster by enabling Akamai's content delivery network (CDN) to serve the static content for Lightning Component framework. A CDN generally speeds up page load time, but it also changes the source domain that serves the files. If your company has IP range restrictions for content served from Salesforce, test thoroughly before enabling this setting.

Where: This setting affects Lightning Experience and other apps that are built on the Lightning Component framework. This setting doesn't affect any version of the Salesforce app. This setting doesn't affect Lightning communities.

Why: CDNs improve the load time of static content by storing cached versions in multiple geographic locations. This setting turns on CDN delivery for the static JavaScript and CSS in the Lightning Component framework. It doesn't distribute your org's data or metadata in a CDN.

How: This setting is disabled by default for existing orgs and enabled by default for new orgs.

To enable CDN, from Setup, enter *Session* in the **Quick Find** box, and then select **Session Settings**. Select **Enable Content Delivery Network (CDN) for Lightning Component framework**, and click **Save**.

If you experience issues, ask your IT department if your company's firewall blocks Akamai CDN content.

Mark Apex Methods as Cacheable

Mark an Apex method as storable (cacheable) instead of using `setStorable()` on every JavaScript action that calls the Apex method to centralize your caching notation for a method in the Apex class.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Why: Marking a method as storable improves your component's performance by quickly showing cached data from client-side storage without waiting for a server trip. If the cached data is stale, the framework retrieves the latest data from the server. Caching is especially beneficial for users on high-latency, slow, or unreliable connections, such as 3G networks.

Prior to Winter '19, to cache data returned from an Apex method, you had to call `setStorable()` in JavaScript code on every action that called the Apex method. Now you can mark the Apex method as storable (cacheable) and get rid of any `setStorable()` calls in JavaScript code.

How: This change is versioned. Existing component code with an API version of 43.0 or earlier continues to work without any changes.

To cache data returned from an Apex method for any component with an API version of 44.0 or later, annotate the Apex method with `@AuraEnabled(cacheable=true)`. For example:

```
@AuraEnabled(cacheable=true)
public static Account getAccount(Id accountId) {
    // your code here
}
```

To update an existing component to API version 44.0, remove `setStorable()` calls in JavaScript code. Annotate the Apex method with `@AuraEnabled(cacheable=true)` instead of `@AuraEnabled`, or you get an error response for the action.

Token Changes for Formatting Dates in JavaScript API Methods

To improve performance and simplify the code, we changed the supported tokens for formatting dates in JavaScript API methods, such as `formatDate()`, in the `AuraLocalizationService` object.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Removed Token

The `w` token, which returned week of year, is no longer supported. We still support the `w` (lowercase) token, which also returns the week of the year (0 ... 53).

Deprecated Tokens

Description	Deprecated Token	Preferred Token	Output
Year (four digits)	y	yyyy	2018

Description	Deprecated Token	Preferred Token	Output
Year (four digits)	Y	yyyy	2018
Year (two digits)	YY	yy	18
Year (four digits)	YYYY	yyyy	2018
AM or PM	A	a	AM or PM
Day of month	DD	dd	01–31

For more information on formatting dates in JavaScript, see [Formatting Dates in JavaScript](#).

Locker API Viewer in the Component Library

You can now access the Locker API Viewer in the Component Library. Previously, you had to navigate to a separate site to view the API Viewer. We're centralizing reference information and tools in the Component Library for your convenience.

Where: This change is visible in the [Component Library](#).

Why: Locker Service applies restrictions to global objects by hiding the objects or providing secure versions of those objects. For example, the secure version of `window` is `SecureWindow`. The API Viewer shows the DOM APIs exposed by Locker Service versus the standard DOM APIs for the most complex wrappers: `SecureDocument`, `SecureElement`, and `SecureWindow`.

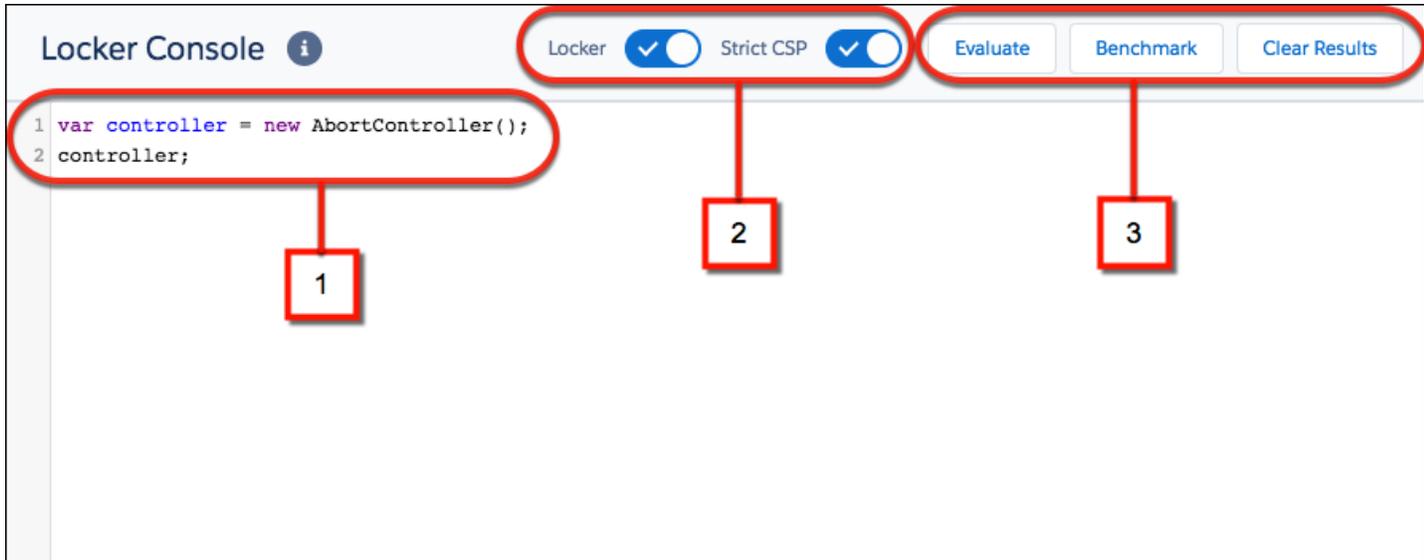
Evaluate and Benchmark JavaScript Code with Locker Console

Use Locker Console to check your JavaScript code's compatibility with Locker Service, and compare how it runs with Locker Service enabled and disabled. Access Locker Console in the Component Library.

Where: This change is visible in the Component Library.

Why: Locker Console enables you to quickly evaluate JavaScript code for issues or benchmark code, without requiring you to create an app to test your component. You can evaluate only JavaScript code in Locker Console. You can't evaluate a complete component bundle or component markup.

How: Here's an overview of the user interface of the Locker Console tool.

**Code Console (1)**

Paste or type your JavaScript code here to evaluate or benchmark it.

Toggles (2)

- Enable or disable Locker Service.
- Enable or disable Strict CSP.

Actions (3)

- Click **Evaluate** to run the code that's displayed in the code console.
- Click **Benchmark** to run your code with and without Locker Service and view relative performance metrics.
- Click **Clear Results** to clear all the displayed results.

Removed `moment` Global Variable

The Lightning Component framework uses the Moment.js library as part of its internal implementation. Prior to Winter '19, customers could access the `moment` global variable that's part of Moment.js. This usage of `moment` in custom Lightning components was never intentional or supported. In Winter '19, we blocked access to the `moment` variable. To use Moment.js, you must upload it as a static resource in your org.

Where: This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

Why: To improve the Lightning component framework, we sometimes change internal implementation details. Don't rely on or use any libraries or global variables that aren't part of the JavaScript API for Lightning components. These resources can be changed or removed at any time.

See the JavaScript API at:

<https://<myDomain>.lightning.force.com/auradocs/reference.app>, where `<myDomain>` is the name of your custom Salesforce domain.

Use Lightning Data Service in More Containers

You can now use Lightning components built on Lightning Data Service in containers other than Lightning Experience and the Salesforce app.

Where: Lightning Data Service is available in the following containers.

- Lightning Experience
- Salesforce app
- Lightning Communities
- Lightning Out
- Lightning Components for Visualforce
- Standalone Lightning apps
- Lightning for Gmail
- Lightning for Outlook

How: To load, create, edit, or delete a record in your custom Lightning component, use the `force:recordData` component, which is built on Lightning Data Service. Your admins and users can interact with your custom component in those containers.

In addition to `force:recordData`, components that are powered by Lightning Data Service include:

- `lightning:recordEditForm` (when used with `lightning:inputField`)
- `lightning:recordForm`
- `lightning:recordViewForm` (when used with `lightning:outputField`)

New and Changed Lightning Components

Build user interfaces quickly with a bevy of new components.

New Components

These components are new and require API version 44.0 and later.

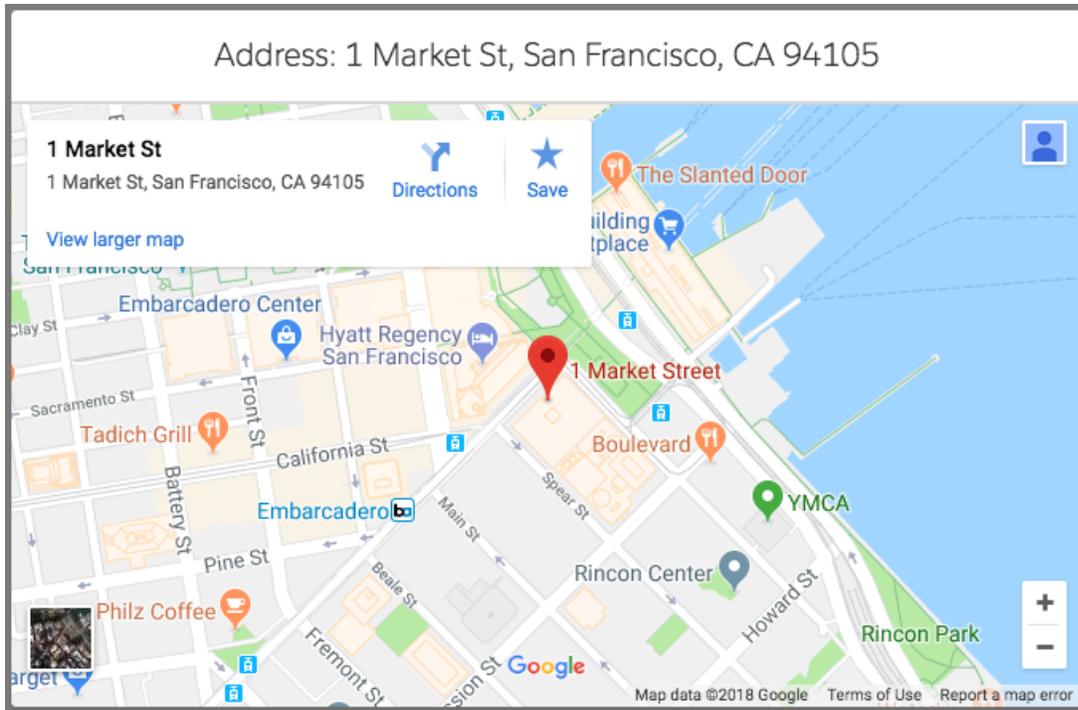
lightning:empApi

Embed the `lightning:empApi` component in your custom Lightning component to subscribe to a streaming event channel and receive event notifications. You can subscribe to any type of event channel on the Lightning Platform, including channels for platform events, PushTopic and generic events, and Change Data Capture events. The `lightning:empApi` component uses a shared CometD-based Streaming API connection, enabling you to run multiple streaming apps in the browser.

lightning:map

The `lightning:map` component securely displays a map of one or more locations using Google Maps. You can pass markers to the component to define the locations to map. A marker can be a coordinate pair of latitude and longitude, or a set of address elements: City, Country, PostalCode, State, and Street.

Here's the map component with one address.

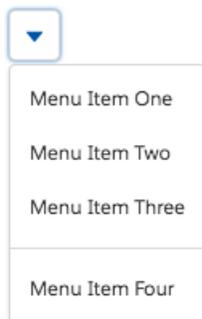


When you specify multiple locations, the map component creates clickable tiles for each location. You can specify a title to display above the list of addresses. You can also show a footer with an “Open in Google Maps” link and specify an initial zoom level for the map.

See <https://lightningdesignsystem.com/components/map/> for more map images.

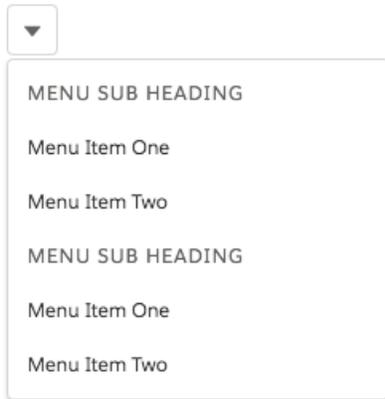
lightning:menuDivider

This component is used as a child component of `lightning:buttonMenu`. Use `lightning:menuDivider` to create a dividing line after a menu item. By default, space is added above and below the divider. Use `variant="compact"` with `lightning:menuDivider` to reduce the space.



lightning:menuSubheader

This component is used as a child component of `lightning:buttonMenu`. Use `lightning:menuSubheader` to create subheadings in the list of menu items. Specify the text of the heading using the `label` attribute.



Changed Components

These components have changed.

lightning:accordion

These attributes are new.

- `allowMultipleSectionsOpen`—Indicates that the user can open multiple sections of the accordion at the same time. By default, only one accordion section is expanded at a time.
- `onSectionToggle`—Specifies a handler for the event that's fired when the open sections change. The event passes an array of all open sections in the accordion.

lightning:buttonMenu

These attributes are new.

- `isLoading`—Enables you to show a spinner activity indicator while the menu is loading.
- `loadingStateAlternativeText`—Specifies required explanatory text, such as "Loading menu...", to display when `isLoading` is true.
- `isDraft`—Specifies that the button menu is in an unsaved state, and displays an asterisk as an indicator next to the button. You can use the button menu draft state to show that there is an unsaved change that could be lost, such as a user change in a customizable menu.
- `draftAlternativeText`—Specifies text describing why the menu is considered in a draft state, and is required when `isDraft` is true.

The `lightning:buttonMenu` component supports two new child components.

- `lightning:menuDivider`
- `lightning:menuSubheader`

lightning:datatable

This value for the `type` column property is new.

- `button-icon`—Displays an icon-only button element that executes an action.

This attribute for the `url` type column property is new.

- `tooltip`—Displays a tooltip for a URL in the datatable column. Use the `typeAttributes` property to pass the tooltip for the URL.

This attribute for the `cellAttributes` table column property is new.

- `iconAlternativeText`—Descriptive text for an icon that is displayed in a data column.

lightning:formattedRichText

This attribute is new.

- `disableLinkify`—Prevents the component from creating links automatically for linkable text in the formatted output.

lightning:fileCard

These attributes are new.

- `hideDescription`—Controls display of the file description caption on the file card. If true, nothing displays in the caption. If false, displays file description in the caption.
- `Description`—Description of the file. Displays the file name by default.

lightning:helptext

This attribute is new.

- `iconVariant`—Enables you to change the style of the helptext icon to one of the following: inverse, warning, or error.

The helptext popover behavior on iOS devices has changed. It opens when you tap the icon, and closes with a second tap on the popover or icon.

lightning:inputField

The `lightning:inputField` component now supports the geolocation field type. It displays input fields for entering latitude and longitude in decimal degrees.

lightning:isUrlAddressable

URLs for components using `lightning:isUrlAddressable` are now case-sensitive.

lightning:listView

This attribute is new.

- `showSearchBar`—Specifies whether the search bar displays. This value defaults to false. The server side can still disable search if it does not support searching.

lightning:menuItem

These attributes are new.

- `prefixIconName`—Adds the specified utility icon before the text of the menu item.
- `href`—Creates a link for the menu item, which enables you to use the button menu for navigation. The link is applied to the content of the menu item, including text and icons.
- `isDraft`—Specifies that the menu item is in an unsaved state, and displays an asterisk as an indicator next to the item. You can use the menu item draft state to show that there is an unsaved change that could be lost, such as a user change in a customizable menu.
- `draftAlternativeText`—Specifies text describing why the menu item is considered in a draft state, which is required when `isDraft` is true.

lightning:navigation

URLs for components using `lightning:navigation` are now case-sensitive.

lightning:quickActionAPI

These methods are new.

- `getAvailableActions`—Get a list of the available actions on a record page.
- `getAvailableActionFields`—Get a list of the available fields for a specific action on a record page.

lightning:nextBestActions (Pilot)

This component executes a strategy, and displays the resulting propositions. The `singleColumn` attribute is now ignored.

 **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:tab

The `label` attribute now supports text only. Previously the label supported a component type, and you could include, for example, an icon in the tab's label. If you use a component in a `lightning:tab` label now, only the text portion of the label value displays. Any CSS classes that are applied are ignored.

Changed Lightning Interfaces

A Lightning interface enables a component to be used in different contexts or to receive extra context data.

This interface has changed.

lightning:availableForFlowScreens

This interface now includes a `validate` attribute, which stores validation logic to run when the flow user navigates to the next screen. For details, see [Add Validation Functions to Custom Screen Components](#).

Visualforce: Field Sets in Lightning Experience and New Access Metrics

Now you can create and edit field sets in Lightning Experience. We added new access metrics to help you decide which Visualforce pages to migrate to Lightning Experience.

IN THIS SECTION:

[Create and Edit Field Sets in Lightning Experience](#)

Now you can create and edit field sets in Lightning Experience.

[New Visualforce Access Metrics Fields](#)

Use the new `ProfileId` and `LogDate` access metrics fields to prioritize which Visualforce pages to migrate to Lightning Experience.

[Securely Retrieve and Display Third-Party Images in Visualforce Pages](#)

Protect your users from unauthorized requests by using the `IMAGEPROXYURL` function to securely fetch images outside your org's server. Loading a third-party image can initiate a malicious authentication request meant to steal Salesforce usernames and passwords. This Visualforce function loads external images over HTTPS and prevents images from requesting user credentials.

[Improve Security by Isolating Untrusted Third-Party Content with iframes](#)

You can now isolate HTML static resources on a separate domain using iframes. Using a separate domain to embed information from untrusted sources protects your Visualforce content.

[URL Redirect Parameters Are No Longer Case-Sensitive](#)

The protected URL parameters used in Visualforce pages—`retURL`, `startURL`, `cancelURL`, and `saveURL`—are no longer case-sensitive. If you change the parameter value from `retURL` to `returl`, the system now recognizes it as a protected parameter. Protected URL parameters allow redirects from Visualforce pages to `salesforce.com` or `*.force.com` domains and prevent malicious redirects to third-party domains.

Create and Edit Field Sets in Lightning Experience

Now you can create and edit field sets in Lightning Experience.

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

Why: Admins love Lightning Experience, but they were missing the ability to create and edit field sets.

A field set is a grouping of fields. For example, you could have a field set that contains fields describing a user's first name, middle name, last name, and business title. When a field set is added to a Visualforce page, developers can loop over its fields and render them. If the page is added to a managed package, administrators can add, remove, or reorder fields in a field set to modify the fields presented on the Visualforce page without modifying any code. The same Visualforce page can present different sets of information, depending on which fields a subscriber prefers to keep.

How: From Setup, enter `object` in the Quick Find box, and select **Object Manager**. Select an object that supports field sets, go to Field Sets, and then click **New**.

SEE ALSO:

[Salesforce Help: About Field Sets](#)

New Visualforce Access Metrics Fields

Use the new `ProfileId` and `LogDate` access metrics fields to prioritize which Visualforce pages to migrate to Lightning Experience.

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

Why: To decide which Visualforce pages to migrate to Lightning Experience, it's helpful to know which pages are used most often and by whom. These new Visualforce Access Metrics fields show you that information.

The `ProfileId` field shows the Salesforce profile ID of the user who viewed the Visualforce page. The `LogDate` field shows the date that the user accessed the page. This field provides more insight into page usage than the `MetricsDate` field, which represents the date the metrics are collected.

How: To query metrics on the Visualforce pages in your org, use the `VisualforceAccessMetrics` object and include the `ProfileId` and `LogDate` fields.

SEE ALSO:

[Visualforce Developer Guide: VisualforceAccessMetrics](#)

Securely Retrieve and Display Third-Party Images in Visualforce Pages

Protect your users from unauthorized requests by using the `IMAGEPROXYURL` function to securely fetch images outside your org's server. Loading a third-party image can initiate a malicious authentication request meant to steal Salesforce usernames and passwords. This Visualforce function loads external images over HTTPS and prevents images from requesting user credentials.

Where: This feature applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To securely retrieve an external image, include the `IMAGEPROXYURL` function on the `src` attribute of a `` tag or the `value` attribute of an `<apex:image>` object.

```
<img src={!IMAGEPROXYURL("http://exampledomain.com/pic.png")} />
```

```
<apex:image value="{!IMAGEPROXYURL("http://exampledomain.com/pic.png")}"/>
```

SEE ALSO:

[Visualforce Developer Guide: apex:image](#)

[Salesforce Help: Formula Operators and Functions](#)

Improve Security by Isolating Untrusted Third-Party Content with iframes

You can now isolate HTML static resources on a separate domain using iframes. Using a separate domain to embed information from untrusted sources protects your Visualforce content.

Where: This feature applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To reference a static HTML file on a separate domain, use `$IFrameResource.<resource_name>` as a merge field, where `resource_name` is the name you specified when you uploaded the static resource.

SEE ALSO:

[Visualforce Developer Guide: Referencing Untrusted Third-Party Content with iframes \(can be outdated or unavailable during release preview\)](#)

[Visualforce Developer Guide: apex:iframe](#)

URL Redirect Parameters Are No Longer Case-Sensitive

The protected URL parameters used in Visualforce pages—`retURL`, `startURL`, `cancelURL`, and `saveURL`—are no longer case-sensitive. If you change the parameter value from `retURL` to `returl`, the system now recognizes it as a protected parameter. Protected URL parameters allow redirects from Visualforce pages to `salesforce.com` or `*.force.com` domains and prevent malicious redirects to third-party domains.

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

SEE ALSO:

[Salesforce Help: Use Protected URL Redirect Parameters \(can be outdated or unavailable during release preview\)](#)

Apex

Batch Apex classes can now opt in to fire platform events when encountering an error or exception. Apex introduces `inherited sharing` on Apex classes, which allows the class to run in the sharing mode of the class that called it. A new `System.Url.getOrgDomainUrl()` method enables you to get endpoints for API calls so you can interact with Salesforce REST and SOAP APIs in Apex code. A new `Callable` interface lets you write code that other developers can build upon, even if their code is in a different package.

For more information on these enhancements, refer to the [Apex Developer Guide](#).

IN THIS SECTION:

[Opt In to Fire Platform Events from Batch Apex Classes \(Beta\)](#)

Batch Apex classes can now opt in to fire platform events when encountering an error or exception. Event records provide more granular tracking of errors than the Apex Jobs UI because they include the record IDs being processed, exception type, exception message, and stack trace. You can also incorporate custom handling and retry logic for failures. Clients listening on an event can tell how often it failed, which records were in scope at the time of failure, and other exception details. Events are also fired for Salesforce Platform internal errors and other “uncatchable” Apex exceptions like `LimitExceptions` that are caused by reaching governor limits.

[Use Inherited Sharing to Secure Your Apex Code](#)

You can now specify the `inherited sharing` keyword on an Apex class, which allows the class to run in the sharing mode of the class that called it. Using `inherited sharing` enables you to pass security review and ensure that your privileged Apex code is not used in unexpected or insecure ways. An Apex class with `inherited sharing` runs as `with sharing` when used as a Visualforce page controller, Apex REST service, or an entry point to an Apex transaction.

[Streamline API Calls to Your Org from Apex Code](#)

Use the new `System.Url.getOrgDomainUrl()` method to interact with Salesforce REST and SOAP APIs in Apex code. Get endpoints for User Interface API calls, for creating and customizing picklist value sets and custom fields, and more. Use the updated `System.UserInfo.getSessionId()` method to retrieve session IDs, even when your code runs asynchronously.

[Share Extensible Functionality with the Callable Interface](#)

The `System.Callable` interface enables you to use a common interface to build loosely coupled integrations between Apex classes or triggers, even for code in separate packages. Agreeing upon a common interface enables developers from different companies or different departments to build upon one another’s solutions. Implement this interface to enable the broader community, which might have different solutions than the ones you had in mind, to extend your code’s functionality.

[Apex: New and Changed Classes and Interfaces](#)

These classes 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. Create draft posts, threaded comments, and managed content topics.

Opt In to Fire Platform Events from Batch Apex Classes (Beta)

Batch Apex classes can now opt in to fire platform events when encountering an error or exception. Event records provide more granular tracking of errors than the Apex Jobs UI because they include the record IDs being processed, exception type, exception message, and stack trace. You can also incorporate custom handling and retry logic for failures. Clients listening on an event can tell how often it failed, which records were in scope at the time of failure, and other exception details. Events are also fired for Salesforce Platform internal errors and other “uncatchable” Apex exceptions like `LimitExceptions` that are caused by reaching governor limits.

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

 **Note:** As a beta feature, Batch Apex Error Events 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.

How: To fire a platform event, a batch Apex class declaration must implement the `Database.RaisesPlatformEvents` interface.

```
public with sharing class YourSampleBatchJob implements Database.Batchable<SObject>,
    Database.RaisesPlatformEvents{
```

```
// class implementation
}
```

SEE ALSO:

[BatchApexErrorEvent Object](#)

Use Inherited Sharing to Secure Your Apex Code

You can now specify the `inherited sharing` keyword on an Apex class, which allows the class to run in the sharing mode of the class that called it. Using `inherited sharing` enables you to pass security review and ensure that your privileged Apex code is not used in unexpected or insecure ways. An Apex class with `inherited sharing` runs as `with sharing` when used as a Visualforce page controller, Apex REST service, or an entry point to an Apex transaction.

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

Why: Apex without a sharing declaration is insecure by default. Designing Apex classes that can run in either `with sharing` or `without sharing` mode at runtime is an advanced technique and can be difficult to distinguish from one where a specific sharing declaration is accidentally omitted. An explicit `inherited sharing` declaration makes the intent clear, avoiding ambiguity arising from an omitted declaration or false positives from security analysis tooling.

There is a distinct difference between an Apex class that is marked with `inherited sharing` and one with an omitted sharing declaration. If the class is used as the entry point to an Apex transaction, an omitted sharing declaration runs as `without sharing`. However, `inherited sharing` ensures that the default is to run as `with sharing`. A class declared as `inherited sharing` runs only as `without sharing` when explicitly called from an already established `without sharing` context.

How: This example declares an Apex class with `inherited sharing` and a Visualforce invocation of that Apex code. Because of the `inherited sharing` declaration, only contacts for which the running user has sharing access are displayed. If the declaration is omitted, even contacts that the user has no rights to view are displayed due to the insecure default behavior of omitting the declaration.

```
public inherited sharing class InheritedSharingClass{
    public List<Contact> getAllTheSecrets(){
        return [SELECT Name FROM Contact];
    }
}
```

```
<apex:page controller="InheritedSharingClass">
    <apex:repeat value="{!allTheSecrets}" var="record">
        {!record.Name}
    </apex:repeat>
</apex:page>
```

Streamline API Calls to Your Org from Apex Code

Use the new `System.Url.getOrgDomainUrl()` method to interact with Salesforce REST and SOAP APIs in Apex code. Get endpoints for User Interface API calls, for creating and customizing picklist value sets and custom fields, and more. Use the updated `System.UserInfo.getSessionId()` method to retrieve session IDs, even when your code runs asynchronously.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: Previously, orgs with My Domain enabled could access some API features from Apex code only after setting up remote site settings or named credentials. Some objects, such as `DatedExchangeRate`, are accessible only through the API. You can now interact with those

objects using Apex code, building endpoints with the `System.Url.getOrgDomainUrl()` method. You can also use the endpoints to access your org's limits information, invoke flows, interact with list views, and so on. To bypass remote site settings, My Domain must be enabled in your org.

API calls sometimes require a session ID and a URL. You can obtain that session ID using the `System.UserInfo.getSessionId()` method. This method previously returned `null` in asynchronous Apex, but it now returns a value whether it's run synchronously or asynchronously.

How: Use `getOrgDomainUrl()` in orgs with or without My Domain to retrieve canonical URLs. For example:

`https://yourDomain.my.salesforce.com`, or, for orgs without My Domain enabled

`https://yourInstance.salesforce.com`

This example uses User Interface API to get default values so that you can clone a record.

```
Http h = new Http();
HttpRequest req = new HttpRequest();
req.setEndpoint(Url.getOrgDomainUrl().toExternalForm()
    + '/services/data/v44.0/limits');
req.setMethod('GET');
req.setHeader('Authorization', 'Bearer ' + UserInfo.getSessionId());
HttpResponse res = h.send(req);
```

You can use `getSessionId()` both synchronously and asynchronously. In asynchronous Apex (Batch, Future, Queueable, or Scheduled Apex), this method returns the session ID only when the code is run by an active, valid user. When the code is run by an internal user, such as the automated process user or a proxy user, the method returns `null`.

You can't make API calls from your Lightning components' JavaScript code, including from related Apex controller code. This behavior is unchanged from previous releases.

SEE ALSO:

[IdeaExchange: Allow Apex to Call Salesforce REST and SOAP APIs Without a Remote Site Setting](#)

[Apex Developer Guide: getOrgDomainUrl\(\)](#)

[Apex Developer Guide: getSessionId\(\)](#)

[Lightning Components Developer Guide: Making API Calls from Apex](#)

Share Extensible Functionality with the `Callable` Interface

The `System.Callable` interface enables you to use a common interface to build loosely coupled integrations between Apex classes or triggers, even for code in separate packages. Agreeing upon a common interface enables developers from different companies or different departments to build upon one another's solutions. Implement this interface to enable the broader community, which might have different solutions than the ones you had in mind, to extend your code's functionality.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

Why: Instead of implementing the `Process.Plugin` interface for use cases it wasn't designed to support, you can now implement `System.Callable`. Simply invoke `Callable` to make a common point of agreement between pieces of code from different parties.

How: To implement the `Callable` interface, you need to write only one method: `call(String action, Map<String, Object> args)`.

In code that utilizes or tests an implementation of `Callable`, cast an instance of your type to `Callable`.

This interface is not intended to replace more specific interfaces. Rather, the `Callable` interface allows integrations in which code from different classes or packages can use common base types.

SEE ALSO:

[Apex Developer Guide: Callable Interface](#)

Apex: New and Changed Classes and Interfaces

These classes and interfaces are new or have changed.

IN THIS SECTION:

[Changed Apex Classes](#)

These existing classes have new or changed methods or constants.

[Changed Apex Enum](#)

These enumerations were updated in this release.

[New Apex Exceptions](#)

These exceptions are introduced in this release.

[New Apex Interfaces](#)

These interfaces were introduced in this release.

[Changed SOAP API Calls for Apex](#)

The `runTests()` call was changed.

Changed Apex Classes

These existing classes have new or changed methods or constants.

Schema.DescribeFieldResult Class

New Method

isAiPredictionField()

Returns a Boolean indicating whether the field is enabled to display Einstein prediction data.

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.Crypto Class

New Methods

verify(String algorithmName, Blob data, Blob signature, Blob publicKey)

Returns a Boolean verifying the digital signature for encrypted data, using the specified algorithm and the supplied public key.

verify(String algorithmName, Blob data, Blob signature, String certDevName)

Returns a Boolean verifying digital signatures for data, using the specified algorithm and the public key associated with the certDevName.

verifyMac()

Returns a Boolean verifying the HMAC signature for data using the specified algorithm, input data, privateKey, and the mac.

System.Url Class**New Methods****getOrgDomainUrl ()**

Returns the canonical URL for your org. For example, `https://yourDomain.my.salesforce.com` or, for orgs without My Domain enabled, `https://yourInstance.salesforce.com`.

System.UserInfo Class**Changed Methods****getSessionId ()**

You can now use `getSessionId ()` in asynchronous Apex (Batch, Future, Queueable, or Scheduled Apex) Previously, this method returned `null` when run asynchronously.

In asynchronous Apex, this method returns the session ID only when the code is run by an active, valid user. When the code is run by an internal user, such as the automated process user or a proxy user, the method returns `null`.

Changed Apex Enum

These enumerations were updated in this release.

Auth.Auth.VerificationMethodEnum Enum

Contains the different ways users can identify themselves when logging in. Can be used to implement mobile-friendly passwordless login pages, and to self-register (and deregister) verification methods.

This enum has a new value, `Password`. Identity can be verified by password.

Metadata.PlatformActionListContextEnum Enum

Describes the different contexts of action lists.

This enum has a new value, `ActionDefinition`. This value is reserved for future use.

New Apex Exceptions

These exceptions are introduced in this release.

Auth Namespace**LoginDiscoveryException**

Throw an exception to indicate that an error occurred when executing the Login Discovery Handler.

Auth.DiscoveryCustomErrorException

Throw an exception to customize error messages that appear on login, verify, and self-registration pages.

New Apex Interfaces

These interfaces were introduced in this release.

Auth.ConfigurableSelfRegHandler Interface

Create a class that implements `Auth.ConfigurableSelfRegHandler` to register users with their email address or phone number instead of a username and password. When you set up your community's self-registration with the Configurable Self-Reg Page, Salesforce generates a default `AutocreatedConfigSelfReg` Apex class. Modify the class to extend the functionality, for example, to change how users are created.

createUser(accountId, profileId, registrationAttributes, password)

Create a community member from the information that the visitor provided on your community's self-registration page.

Auth.LoginDiscoveryHandler Interface

Create a class that implements `Auth.LoginDiscoveryHandler` to log in users based on other verification methods than username and password. Users can identify themselves with their email, phone number, or another identifier like a Federation ID or device identifier. When you set up your community's log in page with Login Discovery Page, Salesforce generates a default `AutocreatedDiscLoginHandler`. You can modify the class, for example, to support single sign-on (SSO).

login(identifier, startUrl, requestAttributes)

Log in the external user given the specified identifier, such as email or phone number. If successful, redirect the user to the community page specified by the start URL.

System.Callable Interface

Enables developers to use a common interface to build loosely coupled integrations between Apex classes or triggers, even for code in separate packages. Agreeing upon a common interface enables developers from different companies or different departments to build upon one another's solutions. Implement this interface to enable the broader community, which might have different solutions than the ones you had in mind, to extend your code's functionality.

call(action, args)

Provides functionality that other classes or packages can utilize and build upon.

Changed SOAP API Calls for Apex

The `runTests()` call was changed.

runTests()

The `RunTestsResult` object includes two new fields.

flowCoverage

An array of results from test runs that executed flows.

flowCoverageWarnings

An array of warnings generated by test runs that executed flows.

ConnectApi (Chatter in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Chatter in Apex. Create draft posts, threaded comments, and managed content topics.

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.

[New and Changed Chatter in Apex Input Classes](#)

These input classes are new or have changes.

[New and Changed Chatter in Apex Output Classes](#)

These output classes are new or have changes.

[New and Changed Chatter in Apex Enums](#)

These enums are new or have changes.

New and Changed Chatter in Apex Classes

These classes are new or have changes.

Chatter Feeds

These new and existing methods are in the `ConnectApi.ChatterFeeds` class.

Create a draft post

Use this existing method with the updated `ConnectApi.StatusCapabilityInput` class.

- `postFeedElement(communityId, feedElement)`

Get the context user's draft feed

Use these existing methods with the `feedType` set to `Draft` and the `subjectId` set to the context user's ID.

- `getFeed(communityId, feedType, subjectId)`
- `getFeed(communityId, feedType, subjectId, sortParam)`

Get the feed elements from the context user's draft feed

Use these existing methods with the `feedType` set to `Draft` and the `subjectId` set to the context user's ID.

- `getFeedElementsFromFeed(communityId, feedType, subjectId)`
- `getFeedElementsFromFeed(communityId, feedType, subjectId, pageParam, pageSize, sortParam)`
- `getFeedElementsFromFeed(communityId, feedType, subjectId, recentCommentCount, density, pageParam, pageSize, sortParam)`

These methods have matching set test methods.

Search the feed elements from the draft feed

Use these existing methods with the `feedType` set to `Draft` and the `subjectId` set to the context user's ID.

- `searchFeedElementsInFeed(communityId, feedType, subjectId, q)`
- `searchFeedElementsInFeed(communityId, feedType, subjectId, pageParam, pageSize, sortParam, q)`
- `searchFeedElementsInFeed(communityId, feedType, subjectId, recentCommentCount, density, pageParam, pageSize, sortParam, q)`

These methods have matching set test methods.

Publish a draft post

This method is new.

- `publishDraftFeedElement (communityId, feedElementId, feedElement)`

Access the comments capability for a comment

This method is new.

- `getThreadsForFeedComment (communityId, commentId, threadedCommentsCollapsed)`

Get threaded comments for a comment

These methods are new.

- `getThreadsForFeedComment (communityId, commentId)`
- `getThreadsForFeedComment (communityId, commentId, pageParam, pageSize)`

Get a threaded comment in context of its parent comments and parent post

This method is new.

- `getCommentInContext (communityId, commentId, pageSize)`

Get comments in a threaded style for a feed element

These methods are new.

- `getCommentsForFeedElement (communityId, feedElementId, threadedCommentsCollapsed)`
- `getCommentsForFeedElement (communityId, feedElementId, pageParam, pageSize, threadedCommentsCollapsed)`
- `getCommentsForFeedElement (communityId, feedElementId, sortParam, threadedCommentsCollapsed)`
- `getCommentsForFeedElement (communityId, feedElementId, threadedCommentsCollapsed, sortParam)`
- `getCommentsForFeedElement (communityId, feedElementId, pageParam, pageSize, threadedCommentsCollapsed, sortParam)`
- `getFeedElementsFromFeed (communityId, feedType, recentCommentCount, density, pageParam, pageSize, sortParam, filter, threadedCommentsCollapsed)`
- `getFeedElementsFromFeed (communityId, feedType, subjectId, recentCommentCount, density, pageParam, pageSize, sortParam, filter, threadedCommentsCollapsed)`
- `getFeedElementsFromFeed (communityId, feedType, subjectId, recentCommentCount, elementsPerBundle, density, pageParam, pageSize, sortParam, showInternalOnly, customFilter, threadedCommentsCollapsed)`

Get a feed element with comments in a threaded style

These methods are new.

- `getFeedElement (communityId, feedElementId, threadedCommentsCollapsed)`
- `getFeedElement (communityId, feedElementId, threadedCommentsCollapsed, commentSort)`
- `getFeedElement (communityId, feedElementId, recentCommentCount, elementsPerBundle, threadedCommentsCollapsed)`
- `getFeedElement (communityId, feedElementId, recentCommentCount, elementsPerBundle, threadedCommentsCollapsed, commentSort)`

Get feed elements with comments in a threaded style for a record feed

This method is new.

- `getFeedElementsFromFeed (communityId, feedType, subjectId, recentCommentCount, elementsPerBundle, density, pageParam, pageSize, sortParam, showInternalOnly, filter, threadedCommentsCollapsed)`

This method has a matching set test method.

Search feed elements with comments in a threaded style

These methods are new.

- `searchFeedElements (communityId, q, threadedCommentsCollapsed)`
- `searchFeedElements (communityId, q, pageParam, pageSize, threadedCommentsCollapsed)`

These methods have matching set test methods.

Create a threaded comment

Use this existing method with the updated `ConnectApi.CommentInput` class.

- `postCommentToFeedElement (communityId, feedElementId, comment, feedElementFileUpload)`

Managed Social Accounts

These new methods are in the `ConnectApi.SocialEngagement` class.

Get managed social accounts

- `getManagedSocialAccount (id)`
- `getManagedSocialAccounts ()`
- `getManagedSocialAccounts (socialNetwork)`

Managed Topics

These new and existing methods are in the `ConnectApi.ManagedTopics` class.

Create content managed topics

Use these existing methods with the `managedTopicType` set to `Content`.

- `createManagedTopic (communityId, recordId, managedTopicType)`
- `createManagedTopicByName (communityId, name, managedTopicType)`

Get content managed topics

Use these existing methods with the `managedTopicType` set to `Content`.

- `getManagedTopic (communityId, managedTopicId)`
- `getManagedTopics (communityId)`
- `getManagedTopics (communityId, managedTopicType)`

Use this new method with the `managedTopicType` set to `Content`.

- `getManagedTopics (communityId, managedTopicType, pageParam, pageSize)`

Delete content managed topics

Use this existing method with the ID of a content topic.

- `deleteManagedTopic (communityId, managedTopicId)`

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](#).

All the Next Best Action methods, even methods introduced in version 43.0, now have a minimum version of 44.0. All the properties of the related input and output classes also have a minimum version of 44.0.

These new methods are in the `ConnectApi.NextBestAction` class.

Execute a strategy

- `executeStrategy(strategyName, maxResults, contextRecordId)`
- `executeStrategy(strategyName, strategyInput)`

We no longer support the `getRecommendations(strategyName, maxResults, contextRecordId)` method.

New and Changed Chatter in Apex Input Classes

These input classes are new or have changes.

Chatter Feeds

ConnectApi.CommentInput

This input class has one new property.

- `threadParentId`—ID of the parent comment for a threaded comment.

ConnectApi.FeedElementCapabilitiesInput

This input class has one new property.

- `status`—Describes the status of the feed element.

ConnectApi.StatusCapabilityInput

This input class has one changed property.

- `feedEntityStatus`—Now includes the `Draft` value.

Next Best Actions (Pilot)

ConnectApi.NBAStrategyInput

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.
- `maxResults`—Maximum number of results. Valid values are from 1 to 25. The default is 3.
- `strategyContext`—Variable and value mappings for the strategy.

New and Changed Chatter in Apex Output Classes

These output classes are new or have changes.

Chatter Feeds

ConnectApi.Comment

This output class has these new properties.

- `threadLevel`—Level of nesting for a comment. 0 indicates a standard comment with a parent post. 1 indicates a threaded comment with a parent comment and a parent post. 2 indicates a threaded comment with two parent comments and a parent post. The UI is limited to these three levels.
- `threadParentId`—ID of the parent comment for a threaded comment.

ConnectApi.CommentCapabilities

This output class has one new property.

- `comments`—If a comment has this capability, it has threaded comments.

ConnectApi.CommentPage

This output class has these new properties.

- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page, or `null` if there isn't a previous page.

Managed Social Accounts**ConnectApi.BaseManagedSocialAccount**

This new output class is abstract and is a superclass of `ConnectApi.ManagedSocialAccount`. It has these properties.

- `defaultResponseAccountId`—Default response account to use when replying to posts sent to this account.
- `displayName`—Real name (or user name if real name not available) for this account on the social network.
- `externalPictureUrl`—URL to the account's avatar image.
- `id`—Internal SFDC ID for this managed social account.
- `label`—Label for the social account.
- `profileUrl`—URL to the account's profile.
- `socialNetwork`—Social network that this account belongs to.
- `uniqueName`—Unique name used for distinguishing same name fan pages; acts like a user name for a fan page.
- `username`—Unique user name or handle for this account on the social network.

ConnectApi.ManagedSocialAccount

This new output class is a subclass of `ConnectApi.BaseManagedSocialAccount`. It has no additional properties.

ConnectApi.ManagedSocialAccounts

This new output class has this property.

- `managedSocialAccounts`—List of managed social accounts.

Managed Topics**ConnectApi.ManagedTopicCollection**

This output class has this new property.

- `nextPageUrl`—Chatter REST API URL identifying the next page, or `null` if there isn't a next page.

Next Best Actions (Pilot)**ConnectApi.AbstractNBAAction**

This new output class has this property.

- `parameters`—List of parameters to pass to the action.
- `type`—Type of action.

ConnectApi.AbstractNBARecommendation

This output class was removed.

ConnectApi.AbstractNBATarget

This new output class has this property.

- `type`—Type of target.

ConnectApi.NBAActionParameter

This new output class has these properties.

- `name`—Name of the parameter.
- `type`—Type of the parameter.
- `value`—Value of the parameter.

ConnectApi.NBAFlowAction

This new output class has these properties.

- `id`—ID of the proposition.
- `name`—Name of the proposition.

ConnectApi.NBAPropositionRecommendation

This new output class has these properties.

- `id`—ID of the proposition.
- `name`—Name of the proposition.
- `url`—URL to the proposition.

ConnectApi.NBARecommendation

This new output class has these properties.

- `acceptanceLabel`—Text indicating user acceptance of the recommendation.
- `actionReference`—Reference to the action to perform, for example, launching a flow.
- `description`—Description of the recommendation.
- `id`—ID of the recommended entity.
- `imageUrl`—URL to the asset file to display.
- `name`—Name of the recommended entity.
- `rejectionLabel`—Text indicating user rejection of the recommendation.
- `target`—Target to act on.
- `targetAction`—Action to recommend.
- `url`—URL to the recommended entity.

ConnectApi.NBARecommendationProposition

This output class was removed.

ConnectApi.Proposition

This output class has these new properties.

- `acceptanceLabel`—Text indicating user acceptance of the recommendation.
- `image`—Image to display.
- `rejectionLabel`—Text indicating user rejection of the recommendation.

Users

ConnectApi.User

For performance reasons, this output class no longer returns the `stamps` property. To get a user's stamps in version 44.0 and later, use SOQL.

New and Changed Chatter in Apex Enums

These enums are new or have changes.

For information about these enums, see [ConnectApi Enums](#) in *Apex Developer Guide*.

ConnectApi.FeedCommentSortOrder

This enum has one new value.

- `CreatedDateOldestAsc`—Sorts by oldest comments in ascending order.

ConnectApi.FeedEntityStatus

This enum has one new value.

- `Draft`—The feed post isn't published but is visible to the author and to users with `Modify All Data` or `View All Data` permission. Comments can't be drafts.

ConnectApi.FeedType

This enum has one new value.

- `Draft`—Contains all feed items that the context user drafted.

ConnectApi.ManagedTopicType

This enum has one new value.

- `Content`—Topics associated with native content.

ConnectApi.NBAActionType

This new enum has this value.

- `Flow`

ConnectApi.NBATargetType

This new enum has this value.

- `Proposition`

ConnectApi.SocialNetworkProvider

This value was removed from this enum.

- `Klout`

Metadata

The Metadata Coverage report has been enhanced and can be accessed from a new location. The `Modify Metadata` perm (Beta) enables users to deploy all metadata, including Apex. You can use the Metadata REST API with all deployments, either via the new REST resource or via the Salesforce CLI. Access more metadata types and Tooling API objects in API version 44.0.

IN THIS SECTION:

[Get Metadata Coverage Status for More Channels, Known Issues, and Sample Scratch Org Definitions](#)

The Metadata Coverage report has been enhanced to show you whether types are supported in four more metadata channels. From the report, you can now access information about known issues associated with the selected metadata type. You can also generate a sample scratch org definition for the type that you can copy and paste into a configuration file. This dynamically generated report is your best source for metadata-coverage information. It shows coverage information for the Summer '18 release and later. You can select the release version you want from a drop-down menu in the upper right corner of the report.

[Enable Access to Metadata Without Enabling Access to Data, Too \(Beta\)](#)

Users with the Modify Metadata permission can update metadata (including Apex) through Metadata API even if they don't also have the Modify All Data permission. Metadata API is used for deployments using change sets, the Ant Migration Tool, or the Salesforce CLI. Users must have the permission that enables use of the feature supported by the metadata they're trying to modify. They must also have the permission that enables their deployment tool.

[Deploy Using REST](#)

You can use the Metadata REST API with all deployments, either via the new `deployRequest` REST resource or via the Salesforce CLI.

[New Change Set Component](#)

The components available for a change set vary by edition. This component is now available for change sets.

[Tooling API](#)

Tooling API includes new and changed objects.

[Metadata API](#)

Metadata API includes new and changed types and fields.

Get Metadata Coverage Status for More Channels, Known Issues, and Sample Scratch Org Definitions

The Metadata Coverage report has been enhanced to show you whether types are supported in four more metadata channels. From the report, you can now access information about known issues associated with the selected metadata type. You can also generate a sample scratch org definition for the type that you can copy and paste into a configuration file. This dynamically generated report is your best source for metadata-coverage information. It shows coverage information for the Summer '18 release and later. You can select the release version you want from a drop-down menu in the upper right corner of the report.

Where: As of the Winter '19 release, the Metadata Coverage report has a new location. If you bookmarked the report in the Summer '18 release, you are redirected to the new location. To access the Metadata Coverage report, go to <https://developer.salesforce.com/docs/metadata-coverage/>.

Why: Knowing whether a type is supported in a particular metadata channel helps you avoid surprises when developing and deploying customizations. You can also use the report to review any known issues associated with a type. The Winter '19 Metadata Coverage report displays coverage status and known issues for over 200 types in seven channels.

- Metadata API
- Source Tracking
- Unlocked Packaging
- Classic Packaging (new)
- Managed Packaging (new)
- Change Sets (new)
- Apex Metadata API (new)

You can also click a metadata type listed in the report to generate a sample scratch org definition for that type. If you develop with scratch orgs, you can copy and paste the definition into a scratch org configuration file to save time.

Enable Access to Metadata Without Enabling Access to Data, Too (Beta)

Users with the Modify Metadata permission can update metadata (including Apex) through Metadata API even if they don't also have the Modify All Data permission. Metadata API is used for deployments using change sets, the Ant Migration Tool, or the Salesforce CLI. Users must have the permission that enables use of the feature supported by the metadata they're trying to modify. They must also have the permission that enables their deployment tool.

The Modify Metadata permission doesn't impact direct customization of metadata using Setup UI pages, because those pages don't use Metadata API for updates.

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

Some metadata, such as Apex, executes in system context, so be careful how you delegate the Modify Metadata permission. Modify Metadata allows deployment of Apex metadata, but it doesn't allow some Apex development and debugging features that still require the Modify All Data permission.

Modify Metadata is enabled automatically when either the Deploy Change Sets or the Author Apex permission is selected. 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: Previously, users needed the Modify All Data permission to deploy metadata using change sets, the Ant Migration Tool, or the Salesforce CLI. Some users don't need the data access conferred by the Modify All Data permission, only the metadata access. Now users can deploy metadata if they have the Modify Metadata permission in addition to permissions enabling access to their chosen deployment tool and the feature the metadata supports. For example, to deploy a change set, users previously had to have permissions enabling the feature the change set customized and both the Deploy Change Sets permission and the Modify All Data permission. Users now need only the feature permission, the Deploy Change Sets permission, and the Modify Metadata permission to deploy the change set.

Deploy Using REST

You can use the Metadata REST API with all deployments, either via the new `deployRequest` REST resource or via the Salesforce CLI.

Who: You need to have the Modify Metadata permission (in beta) or the Modify All Data permission to perform deployments, including those using Metadata REST API for Deploy.

Why: By default, the Salesforce CLI uses SOAP for deployments. Deployments using REST aren't bound by the 39 MB .zip file size limit that applies to SOAP deployments. The limit for the number of components that are uncompressed into an unzipped folder after upload is the same for both SOAP and REST deployments.

How: You can enable the Metadata REST API for Deploy in the Salesforce CLI by using a CLI runtime configuration value. For more about setting CLI runtime configuration values, see the *Salesforce DX Developer Guide*.

To enable the Metadata REST API for Deploy beta feature:

```
sfdx force:config:set restDeploy=true
```

After Metadata REST API for Deploy is enabled for the Salesforce CLI, deployments initiated using the `mdapi:deploy` or `source:push` commands use REST.

For more information about using Metadata API's `deployRequest` resource, see the *Metadata API Developer Guide*.

New Change Set Component

The components available for a change set vary by edition. This component is now available for change sets.

Lightning Experience Theme

Represents a set of custom brand images and colors in your org.

Where: This change applies to Enterprise, Performance, Unlimited, and Database.com Editions.

Tooling API

Tooling API includes new and changed objects.

The [Force.com 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 New and Changed Objects

Tooling API includes new and changed objects.

New Objects

These objects are new.

EmbeddedServiceCustomLabel

Represents a customized label that appears in the snap-in for a particular Snap-ins deployment. Labels can be customized for both Snap-ins Chat and Snap-ins Appointment Management (beta).

FlowElementTestCoverage

Represents a flow element that was executed by a given Apex test method.

FlowTestCoverage

Represents test coverage for a flow or process by a given Apex method.

Changed Objects

These objects have changed.

MetadataComponentDependency

This field has changed.

MetadataComponentName

A flow name no longer includes a version number. For more information, see [Version Numbers Are Omitted from Flow File Names in the API](#).

OwnerChangeOptionInfo

This field is new.

ParentId

Represents the durable ID of the parent ChangeOwnerOptionInfo record.

SubscriberPackageVersion

These fields are new.

Dependencies

Other subscriber package versions that this subscriber package version depends on.

InstallationKey

Installation key for a key-protected package.

This field is hidden. It's not queryable, but you can include it in the `WHERE` clause of SOQL queries. In some queries, it's required.

Metadata API

Metadata API includes new and changed types and fields.

New Metadata Types

Audience

Represents the audience in a community. An audience consists of different types of criteria, where the audience can be assigned and used for targeting in a community.

LightningExperienceTheme

Represents the details of a custom theme, including the BrandingSet. Themes enable admins to specify configurable attributes, such as three colors and five images. The colors and some of the images override SLDS token values and influence the generation of `app.css`.

OmniChannelSettings

Represents the Omni-Channel settings for an org.

PresenceDeclineReason

Represents an Omni-Channel decline reason that agents can select when declining work requests.

PresenceUserConfig

Represents a configuration that determines a presence user's settings.

QueueRoutingConfig

Represents the settings that determine how work items are routed to agents.

ServiceChannel

Represents a channel of work items that are received from your organization—for example, cases, chats, or leads.

ServicePresenceStatus

Represents a presence status that can be assigned to a service channel.

Updated Metadata Types and Fields

These metadata types have fields that have been added or changed.

Bot

This field is new.

botMlDomain

Represents the intent set that groups intents, entities, and variables associated with a bot. All Einstein Bot versions now share a single bot intent set.

BotVersion

These fields have been removed in API version 44.0 and later.

apexClass

Einstein Bot dialog actions now support Apex, Flows, and Send Email. The `apexClass` field has been replaced by `invocationActionType` and `invocationActionName`.

botVariable

Name of the Bot Variable that is used as part of an Invocation Mapping.

field

API Name of an SObject Field to be used as part of the operand.

leftOperandBotVariable

Name of the bot variable that is used as the left side of the condition operation.

LocalMlDomain

All Einstein Bot versions now share a single bot intent set, so this field is no longer needed.

operandType

No longer needed.

subjectType

No longer needed.

value

No longer needed.

These fields are new.

conversationVariables

A `conversationVariables` is a container that stores a specific piece of data collected from the customer. You can use variables within dialog actions as both inputs and outputs.

invocationActionName

The name of the action.

invocationActionType

The type of Action element to add in a bot dialog.

leftOperandName

Required. Name of the variable used as the left side of the condition operation.

leftOperandType

Type of the variable used as the left side of the condition operation.

sourceName

Name of the source CustomField or MISlotClass used in the variable operation.

sourceValue

Literal value used as the source for this variable operation.

targetName

Name of the target variable used in the variable operation.

targetType

Type of the target used in the variable operation.

value

Literal value to be assigned to the specified parameter.

variableName

Name of the Bot Variable that is used as part of an Invocation mapping.

variableType

Type of the variable used in this invocation mapping.

CaseSettings

Introduced in API version 42.0, this field has been added to the *Metadata API Developer Guide*.

enableE2CSourceTracking

Indicates whether Set Case Source to Email is enabled (`true`) or not (`false`). After you enable this setting, the **Case Source** field is updated to `Email` for all cases that originate from Email-to-Case. Associated emails are marked as `Read` when the agent opens the case.

CommunityTemplateDefinition

This field has changed.

defaultBrandingSet

This is now a read-only field on this type. You can now implement the field on `CommunityThemeDefinition` rather than `CommunityTemplateDefinition`. Existing packages that have set the API version to values 40.0 through 43.0 continue to function normally.

CommunityThemeDefinition

These fields are new.

bundleInfo

This field has been added to support exporting themes.

defaultBrandingSet

This field has been added to maintain functionality previously implemented in `CommunityTemplateDefinition`.

themeRouteOverride

This field has been added to support exporting themes.

CommunityThemeBundleInfo

This field has been added to support exporting themes.

CommunityThemeRouteOverride

This field has been added to support exporting themes.

ContentAsset

This field is new.

isVisibleByExternalUsers

Indicates whether unauthenticated users can see the asset file (`true`) or not (`false`).

CspTrustedSite

This field is new.

context

The `context` enum determines the scope of the trust for the listed third-party host.

CustomField

This field has changed.

encrypted

The `encrypted` Boolean field is now available only in versions 34.0 through 43.0.

This field is new.

encryptionScheme

The `encryptionScheme` enum determines which encryption scheme a field takes. Valid values are `None`, `ProbabilisticEncryption`, `CaseSensitiveDeterministicEncryption`, and `CaseInsensitiveDeterministicEncryption`.

CustomObject

This field is new.

massQuickActions (SearchLayouts subtype)

The list of actions that you can use to perform mass quick action on records. Use this field to add an existing create or update action.

EmbeddedServiceConfig

This field is new.

embeddedServiceCustomLabels

The `embeddedServiceCustomLabels` field represents the custom labels used in the Snap-ins deployment.

FlexiPage

These fields have changed.

actionListContext (PlatformActionList subtype)

The `PlatformActionListContext` enum has a new value, `ActionDefinition`. This value is reserved for future use.

type (FlexiPageRegion subtype)

The `FlexiPageRegionType` enum has a new value, `Background`. This value represents a region for background utility items, which aren't visible in the UI.

leftValue (UiFormulaCriterion subtype)

This field now accepts the `{!$Permission.CustomPermission.permissionName}` and `{!$Permission.StandardPermission.permissionName}` expressions to define component visibility rules based on user permissions.

Flow

This field is new.

status

The `status` enum represents the activation status of the flow. Valid values are `Active`, `Draft`, `Obsolete`, and `InvalidDraft`. For more details, see [Version Numbers Are Omitted from Flow File Names in the API](#).

These fields have changed.

actionType (FlowActionCall subtype)

The `actionType` enum has two new values, `assignKnowledgeArticles` and `publishKnowledgeArticles`. Both support mass actions on article list views. `assignKnowledgeArticles` assigns Knowledge articles, and `publishKnowledgeArticles` publishes Knowledge articles.

fullName

The `fullName` field no longer includes the version number, so the flow file name doesn't have to change with every version. For more details, see [Version Numbers Are Omitted from Flow File Names in the API](#).

ForecastingSettings

This field has changed.

name

The **`Territory_Model_Name`** value, where `Territory_Model_Name` is the name of your active territory model, has been added.

ListView

This field has changed.

filterScope

The `FilterScope` enum has a new value, `MineAndMyGroups`. This value indicates that the list view includes records owned by the user running the list view and records assigned to that user's queues. For details, see [See Approval Requests Assigned to Your Queues in All Salesforce Experiences](#).

Network

A new valid value, `Configurable`, has been added to these fields: `changePasswordPageOverrideSetting`, `forgotPasswordPageOverrideSetting`, `homePageOverrideSetting`, `loginPageOverrideSetting`, and `selfRegProfilePageOverrideSetting`. Use to identify a page type for a page override.

We added the `verificationTemplate` field to represent the email template used to communicate with users when they must identify their identity. For example, when users log in without a password or from a new device, they receive an email with a PIN to confirm their identity.

NetworkBranding

This field is new.

LoginBackgroundImageUrl

Specifies the path to the image URL that appears as the background on the community's login pages. This URL can be fixed or dynamic. A dynamic URL contains the experience ID parameter, `{expid}`.

Profile

This field was added, but it's available in API version 41.0 and later.

categoryGroupVisibilities (ProfileCategoryGroupVisibility subtype)

The `categoryGroupVisibilities` field indicates which data category groups are visible to users assigned to this profile.

SharingSet

This field has changed.

object

The Campaign, Opportunity, and Order objects are available in beta. To enable Sharing Sets for Campaigns, Opportunities, and Orders in your org, contact Salesforce Customer Support. Specify which object, or all three, you want to use with sharing sets.

Updated CustomObjectTranslation Language Support Information

Updates have been made to the *Metadata API Developer Guide* appendices that describe CustomObjectTranslation language support. In addition to including the following languages, there are corrections to the field values that each language supports.

Fully Supported Languages

Norwegian, Spanish (Mexico), and Swedish

End-user Languages

Croatian, Portuguese (Portugal), Slovak, and Slovenian

Updated Result Objects

This metadata result object has new fields.

DeployResult

These fields are new for RunTestsResult.

flowCoverage

An array of results from test runs that executed flows.

flowCoverageWarnings

An array of warnings generated by test runs that executed flows.

SEE ALSO:

[Upgrade Flow Files to Version 44.0 with Metadata API](#)

[Update Tenant Secret Statuses and Schemes Through the API](#)

API

Enjoy greater programmatic access to Salesforce in API version 44.0.

IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[SOSL](#)

Salesforce Object Search Language (SOSL) includes new support for searching through list views.

[REST API](#)

REST API includes new, changed, and deprecated calls.

[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. Create draft posts, threaded comments, a folder's share link, and managed content topics.

[Reports and Dashboards REST API](#)

These resources have new properties: Analytics Notifications (`/analytics/notifications/notification_ID`), Dashboards (`/analytics/dashboards/`), and Report Types (`/analytics/report-types/`).

[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. Now you can allow users to choose how much white space they prefer in their user interface.

[Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs](#)

Get the available actions for a page and the action's fields with new methods for the `lightning:quickActionAPI` component. Use the 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.

[Salesforce Console API](#)

More of the Salesforce Console Integration Toolkit JavaScript APIs are available in the Lightning Console JavaScript API. Generate and open console URLs, and set a navigation item to a specific ID.

[Open CTI API](#)

The `onNavigationChange()` method is now invoked when users create a case record and the new case is viewed in the same tab. The methods to set softphone size in Lightning Experience have higher maximums.

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.

Audience

Represents an audience that is defined by criteria and can be assigned and used for targeting in a community.

BatchApexErrorEvent

Represents a platform event associated with a batch Apex class. This object is available in API 44.0 and later versions.

CareDiagnosis

Represents the details of a diagnosis including code type, name, and description. One or more care diagnoses can be associated with a care utilization request.

CarePreauth

Represents preauthorizations for care under a member's plan.

CarePreauthItem

Represents the details of items included in a preauthorization for care under a member's plan.

CareRequest

Represents the general details of a care-related request including member information, admission date, decision reason, and so on. A single request can contain multiple diagnoses, services, or drugs. Care utilization requests include preauthorizations for drugs and services, admission notifications, concurrent review of admissions, appeals, complaints, and grievances.

CareRequestConfiguration

Represents the details for a record type such as service request, drug request, or admission request. One or more record types can be associated with a care utilization request.

CareRequestDrug

Represents the details of a requested drug including name, strength, frequency, and instructions for administration. One or more drug requests can be associated with a care utilization request.

CareRequestItem

Represents the details of a care service request, including name, modifiers, and the effective date. One or more care service requests can be associated with a care utilization request.

CoverageBenefit

Represents the benefits provided to a member by a purchaser's plan they belong to.

ContentDocumentListViewMapping

Represents an association between a ListView and a Quip ContentDocument. Maintains the mapping between a list view and Quip document when the list view is exported to a newly created Quip document.

CoverageBenefitItem

Represents the benefits items provided to a member by a purchaser's plan that the member belongs to.

EmbeddedServiceLabel

Represents a customized label in Snap-ins Chat or Snap-ins Appointment Management.

ExternalSocialAccount

Represents a managed social media account on a social network such as Facebook or Twitter. This object is available in API version 29.0 and later but was previously undocumented.

ForecastingShare

Represents forecasts shared between a role and a user. Available in API version 44.0 and later.

ListEmailIndividualRecipient

For a list email in Salesforce, represents the individual recipients in a list view that are being sent an email. Available in API version 44.0 and later.

MemberPlan

A member plan defines the members and their dependents that a purchaser plan provides coverage to.

NetworkDiscoverableLogin

Represents the Login Discoverable login page that external users use to log in to the community.

PurchaserPlan

Represents the pay plan that a purchase makes available to its members and members' dependents.

PurchaserPlanAssn

Represents the plans that a purchaser offers to its members.

PlanBenefit

Represents the standard benefits available under a purchaser's plan, that the purchaser offers to their members.

PlanBenefitItem

Represents the details of a benefit available under a purchaser's plan, that the purchaser offers to their members.

RecordActionHistory

Represents the life cycle of the guided action as it goes through different states on an associated record. Available in API version 44.0 and later.

RemoteKeyCalloutEvent (Beta)

Represents an event for callouts that fetch encrypted key material from a customer endpoint.

SitelframeWhitelistUrl

Represents a list of external domains that you want to allow to frame your site or community pages. This object is available in API version 44.0 and later.

SocialPersona

Represents a snapshot of a contact's profile on a social network such as Facebook or Twitter. This object is available in API version 22.0 and later but was previously undocumented.

SocialPersonaHistory

Represents the history of changes to the values in the fields of a social persona object. This object is available in API version 26.0 and later but was previously undocumented.

SocialPost

Represents a snapshot of a post on a social network post such as a Facebook or Twitter. This object is available in API version 23.0 and later but was previously undocumented.

SocialPostFeed

Represents posts and comments on the social post object and recent changes to the object's tracked fields. This object is available in API version 26.0 and later but was previously undocumented.

SocialPostHistory

Represents the history of changes to the values in the fields of a social post object. This object is available in API version 26.0 and later but was previously undocumented.

SocialPostShare

Represents a sharing entry on a social post record. This object is available in API version 23.0 and later but was previously undocumented.

Survey Subject

Represents a relationship between a survey and another object, like a case or account. Available in API version 44.0 and later.

UserEmailPreferredPerson

Represents a mapping for a user's preferred record for an email address when multiple records match an email field. Available in API version 44.0 and later.

UserEmailPreferredPersonShare

Represents a sharing entry on a `UserEmailPreferredPerson` object. Available in API version 44.0 and later.

VoiceCallRecording

Represents a Lightning Dialer call recording. Call recordings are saved as files in Salesforce.

VoiceCallRecordingShare

Represents a sharing entry on a `VoiceCallRecording`.

Changed Objects

These objects have changed.

Changed Objects

SurveySubject

Surveys can now be associated with `ServiceAppointment` and custom objects.

AccountBrand

You can now search this object.

This field is new.

- `LogoUrl`

CustomSite

We added `External` as a picklist value to the `clickjackProtectionLevel` field.

EmailDomainKey

These fields are new.

- `AlternatePublicKey`
- `AlternateSelector`
- `AlternateTxtRecordName`
- `TxtRecordName`
- `TxtRecordsPublishState`

EmailMessage

These fields are new.

- `FirstOpenedDate`
- `IsBounced`
- `IsOpened`
- `IsTracked`
- `LastOpenedDate`

EmailRelay

These fields are new.

- `IsRequireAuth`
- `Password`
- `Username`

Event

These fields are new and read-only. They represent Lightning Experience event series (beta).

- `IsRecurrence2`—Indicates whether a Lightning Experience event is scheduled to repeat (`true`) or only occurs once (`false`).
- `IsRecurrence2Exception`—Indicates whether an individual event in a Lightning Experience event series has a recurrence pattern that's different from the rest of the series, making it an exception.
- `IsRecurrence2Exclusion`—Indicates when updates to a Lightning Experience event series recurrence pattern have been made but affect only future event occurrences.
- `Recurrence2PatternStartDate`—Indicates the date and time when the Lightning Experience event series begins.
- `Recurrence2PatternText`—Indicates the recurrence pattern for Lightning Experience event series.
- `Recurrence2PatternTimeZone`—Indicates the time zone in which the Lightning Experience event series was created or updated.
- `Recurrence2PatternVersion`—Indicates by version the standard specifications for Lightning Experience event series recurrence patterns.

EventLogFile

In the Lightning Error event type, unrelated error events in the `UI_EVENT_SOURCE` field are now filtered out of the event logs.

In the Wave Change event type, the following fields are new.

- `ANALYTICS_MODE`—Indicates where the dashboard is displayed.
- `IS_MOBILE`—Specifies whether the dashboard is displayed in the mobile app.
- `PAGE_CONTEXT`—Indicates the context of the page in which the dashboard is displayed.

Folder

These values are new to the `Type` field.

- `Quick Text`
- `Macro`

ForecastingShare

You can now update this object.

This field is new.

- `AccessLevel`

The `SharedForecastManagerRoleId` field can now represent a territory whose forecasts you want to share.

ForecastingType

This value is new to the `DeveloperName` field.

- `TerrOppAmt_Primary_Model`

ListEmail

This field is new.

- `IsTracked`

LogoutEventStream

This object's fields do not support group, filter, or sort properties.

Macro

These fields are new.

- `FolderId`—Returns the ID of the folder that contains the macro.
- `FolderName`—Name of the folder that contains the macro.

Network

These fields are new.

- `OptionsThreadedDiscussionsEnabled`—Returns whether threaded discussions are enabled for a community.
- `VerificationEmailTemplateId`—Returns the ID of the email template used when users must verify their identity, for example, when they log in without a password or from a new device.

NetworkPageOverride

We added the `Configurable` picklist value to the `OverrideSetting` field. `Configurable` represents Login Discovery and Configurable Self-Reg page types.

NetworkSelfRegistration

These fields are new.

- `ApexHandlerId`—The ID of the Apex handler created by configurable self-registration page.
- `ExecuteApexHandlerAsId`—The ID of the user who is executing the configurable self-registration handler.
- `OptionsShowFirstName`—If true, the First Name field appears on the self-registration form.
- `OptionsShowLastName`—If true, the Last Name field appears on the self-registration form.
- `OptionsShowUsername`—If true, the Username field appears on the self-registration form.
- `OptionsShowNickname`—If true, the Nickname field appears on the self-registration form.
- `OptionsShowMobilePhone`—If true, the Mobile Phone field appears on the self-registration form.
- `OptionsShowEmail`—If true, the Email field appears on the self-registration form.
- `OptionsIncludePassword`—If true, the Include Password field appears on the self-registration form.
- `VerificationMethod`—Returns the verification method required for this self-registration, which can be `SyncEmail` or `SMS`.

PartnerMarketingBudget

`Billable` was added as a supported property to the `EndDate` and `StartDate` fields.

This field is new.

- `IgnoreValidation`—When enabled, ignores some restrictions on the budget's child objects.

PlatformAction

`ActionDefinition` was added as a supported value to the `ActionListContext` field. This value is reserved for future use.

Quick Text

These fields are new.

- `FolderId`—Returns the ID of the folder that contains the quick text.
- `FolderName`—Name of the folder that contains the quick text.

RecordAction

These fields are new.

- `ActionDefinition`—The developer name of the action to associate with the record. This field allows a `RecordAction` to support other types of guided actions in addition to flows. The `FlowDefinition` field is maintained in this release, but it will be deprecated in a future release.
- `IsMandatory`—Specifies whether the action associated with the record is mandatory.

This field was updated.

- `Status`—This field includes a new value, `Started`, which indicates that the action was launched.

ServiceReport

These fields are new.

- `IsSigned`—Indicates whether the service report contains one or more signatures
- `ServiceReportLanguage`—The language that the service report uses. A service report's language is determined by the `Service Report Language` field on the associated work order or, if no language is specified, the default language in Salesforce of the user generating the report.

SurveyInvitation

The new `ResponseStatus` picklist field describes whether a participant has responded to the survey that's associated with the invitation. Possible values include `NotStarted`, `Started`, `Paused`, and `Completed`.

SurveyQuestion

We added three picklist values to the `QuestionType` field.

- `CSAT`
- `Picklist`
- `Slider`

SurveyResponse

The new `InterviewId` field provides the ID of the `FlowInterview` object that's associated with the participant's response to the survey.

Territory2

This field is new.

- `ForecastUserId`

TenantSecret

You can now update the `Status` field.

UserPreference

`108 (Density)` was added as a supported value to the `Preference` field.

VerificationHistory

We added the following picklist values to the `Status` field.

- `FailedInvalidPassword`
- `FailedPasswordLockout`

VoiceCall

We added the `Bridge` picklist value to the `CallType` field.

This field is new.

- `IsRecorded`

VoiceUserPreferences

This field is new.

- `DeskPhoneNumber`

Work Order

The new `ServiceReportLanguage` picklist field determines which language is used for all service reports and service report previews created for the work order, its service appointments, and its work order line items and their service appointments.

BestCommentId Field Added to Feed Objects

The `BestCommentId` field was added to all `xFeed` objects.

- `AccountFeed`
- `AccountRelationshipFeed`
- `ActiveScratchOrgFeed`
- `ArticleType__Feed`
- `AssetFeed`
- `AssetRelationshipFeed`
- `AssignedResourceFeed`
- `CampaignFeed`
- `CareDiagnosisFeed`
- `CarePreAuthFeed`
- `CarePreAuthItemFeed`
- `CareRequestDrugFeed`
- `CareRequestFeed`
- `CareRequestItemFeed`
- `CaseFeed`
- `CertificationDefFeed`
- `ChannelProgramFeed`
- `ChannelProgramLevelFeed`
- `CollaborationGroupFeed`
- `ConsumptionScheduleFeed`
- `ContactFeed`
- `ContentDocumentFeed`
- `ContractFeed`

- CoverageBenefitFeed
- CoverageBenefitItemFeed
- DashboardComponentFeed
- DashboardFeed
- DirectMessageFeed
- EngagementProgramFeed
- EntitlementFeed
- EntityMilestoneFeed
- EventFeed
- GoalFeed
- LandingPageFeed
- LeadFeed
- LinkedArticleFeed
- LocationFeed
- MaintenanceAssetFeed
- MaintenancePlanFeed
- MarketingFormFeed
- MarketingLinkFeed
- MemberPlanFeed
- MetricFeed
- NamespaceRegistryFeed
- NewsFeed
- OperatingHoursFeed
- OpportunityFeed
- OrderDeliveryGroupFeed
- OrderDeliveryGroupLineFeed
- OrderFeed
- OrderItemFeed
- OrderPriceAdjustmentLineFeed
- OrgSnapshotFeed
- PartnerFundAllocationFeed
- PartnerFundClaimFeed
- PartnerFundRequestFeed
- PartnerMarketingBudgetFeed
- PlanBenefitFeed
- PlanBenefitItemFeed
- Product2Feed
- ProductConsumedFeed
- ProductItemFeed
- ProductItemTransactionFeed

- ProductRequestFeed
- ProductRequestLineItemFeed
- ProductRequiredFeed
- ProductTransferFeed
- ProfileSkillEndorsementFeed
- ProfileSkillFeed
- ProfileSkillUserFeed
- PurchaserPlanAssnFeed
- PurchaserPlanFeed
- QuoteFeed
- ReportFeed
- ResourceAbsenceFeed
- ResourcePreferenceFeed
- ReturnOrderFeed
- ReturnOrderLineItemFeed
- ScratchOrgInfoFeed
- ServiceAppointmentFeed
- ServiceContractFeed
- ServiceCrewFeed
- ServiceCrewMemberFeed
- ServiceResourceCapacityFeed
- ServiceResourceFeed
- ServiceResourceSkillFeed
- ServiceTerritoryFeed
- ServiceTerritoryLocationFeed
- ServiceTerritoryMemberFeed
- ServiceTerritoryWorkTypeFeed
- ShipmentFeed
- SignupRequestFeed
- SiteFeed
- SkillRequirementFeed
- SocialPostFeed
- SolutionFeed
- SOSessionFeed
- SurveyFeed
- TaskFeed
- Territory2ModelFeed
- TimeSheetEntryFeed
- TimeSheetFeed
- TopicFeed

- UserFeed
- UserProfileFeed
- WorkBadgeDefinitionFeed
- WorkCoachingFeed
- WorkFeedbackRequestFeed
- WorkGoalFeed
- WorkOrderFeed
- WorkOrderLineItemFeed
- WorkPerformanceCycleFeed
- WorkRewardFundFeed
- WorkRewardFundTypeFeed
- WorkTypeFeed
- WorkUpgradeActionFeed
- WorkUpgradeCustomerFeed

SEE ALSO:

[Update Tenant Secret Statuses and Schemes Through the API](#)

SOSL

Salesforce Object Search Language (SOSL) includes new support for searching through list views.

Changed Clauses

ListView=Recent

`USING ListView=` is an optional returning clause used to search within a single given object's list view. You can now use `USING ListView=Recent` to search for the most recently accessed items that were viewed or referenced by the current user.

REST API

REST API includes new, changed, and deprecated calls.

Where: This change applies to all versions of the Salesforce app in Enterprise and Unlimited editions.

New and Changed Calls

New Calls

`/v44.0/consent/action/`

Determine the actions to which your customer has (or hasn't) consented, regardless of which objects in Salesforce recorded the consent.

`/v44.0/support/knowledgeArticles/{articleUrlName}`

Retrieve articles by providing the URL name.

Changed Calls

/vXX.X/limits/

For the data storage and file storage reports, `/vXX.X/limits/` performs calculations the same way as the Salesforce user interface. The API now uses these definitions:

- 1 KB = 1,024 bytes
- 1 MB = 1,024 KB = 1,048,576 bytes

Previously, it used these definitions:

- 1 KB = 1,000 bytes
- 1 MB = 1,000 KB = 1,000,000 bytes

/v44.0/support/knowledgeArticles

The Article Summary and Article Detail sections of the response now include:

- `articleType`
- `urlName`

SOAP API

SOAP API includes new, changed, and deprecated calls.

New, Changed, and Deprecated Calls

Changed Headers

This header has changed in API version 44.0.

OwnerChangeOptions

Two new types were added.

- `KeepSalesTeam` indicates whether an opportunity's opportunity team is retained when the owner is changed.
- `KeepSalesTeamGrandCurrentOwnerReadWriteAccess` indicates whether the opportunity's previous owner retains read/write access after the owner is changed.

Chatter REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Chatter REST API. Create draft posts, threaded comments, a folder's share link, and managed content topics.

 **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.

[New and Changed Chatter REST API Request Bodies](#)

These request bodies are new or have changes.

[New and Changed Chatter REST API Response Bodies](#)

These response bodies are new or have changes.

New and Changed Chatter REST API Resources

These resources are new or have changes.

Chatter Feeds

Create a draft post

Make a POST request to the existing `/chatter/feed-elements` resource with the updated Status Capability Input request body.

Get the URL to the context user's draft feed

Make a GET request to the new `/chatter/feeds/draft/me` resource.

Get all posts that the context user drafted

Make a GET request to the new `/chatter/feeds/draft/me/feed-elements` resource.

Publish a draft post

Make a POST request to the new `/chatter/feed-elements/publish-draft` resource with the `feedElementId` parameter.

Access the comments capability for a comment

Make a GET request to the new `/chatter/comments/commentId/capabilities/comments` resource.

Get threaded comments for a comment

Make a GET request to the new `/chatter/comments/commentId/capabilities/comments/items` resource.

Get a threaded comment in context of its parent comments and parent post

Make a GET request to the new `/chatter/comments/commentId/thread-context` resource.

Get comments in a threaded style for a feed element

Make a GET request to the existing `/chatter/feed-elements/feedElementId/capabilities/comments` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Make a GET request to the existing `/chatter/feed-elements/feedElementId/capabilities/comments/items` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Get a feed element with comments in a threaded style

Make a GET request to the existing `/chatter/feed-elements/feedElementId` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Get feed elements with comments in a threaded style for a home feed

Make a GET request to the existing `/connect/communities/communityId/chatter/feeds/home/feed-elements` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Get feed elements with comments in a threaded style for a record feed

Make a GET request to the existing `/chatter/feeds/record/recordId/feed-elements` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Get feed elements with comments in a threaded style for a user profile feed

Make a GET request to the existing `/chatter/feeds/user-profile/userId/feed-elements` resource with the new `threadedCommentsCollapsed` parameter set to `false`.

Get and search feed elements with comments in a threaded style

Make a GET request to the existing `/chatter/feed-elements` resource with the existing `q` parameter and the new `threadedCommentsCollapsed` parameter set to `false`.

Create a threaded comment

Make a POST request to the existing `/chatter/feed-elements/feedElementId/capabilities/comments/items` with the updated Comment Input request body.

Collaborative Forecasts**Get a list of managers or territories between the context user and a specified user or territory in the forecast hierarchy**

Make a GET request to the new `/connect/forecasting/ancestors/forecastingTypeId` resource.

 **Note:** This resource replaces the `/connect/forecasting/manager-ancestors` and `/connect/forecasting/manager-ancestors/forecastingManagerUserRoleId` resources.

Get the appropriate list of forecasts for a given user's dropdown menu on the forecasts page

Make a GET request to the new `/connect/forecasting/my-forecasts-list/forecastingTypeId` resource.

Get a list of users and territories whose forecasts the context user has access to view

Make a GET request to the new `/connect/forecasting/jump-to-user/forecastingTypeId` resource.

 **Note:** This resource replaces the `/connect/forecasting/jump-to-user` resource.

Folders**Access a folder's share link**

Make a GET request to the new `/connect/folders/folderId/folder-shares/link` resource.

Create a folder's share link

Make a PUT request to the new `/connect/folders/folderId/folder-shares/link` resource.

Delete a folder's share link

Make a DELETE request to the new `/connect/folders/folderId/folder-shares/link` resource.

Managed Topics**Create content managed topics**

Make a POST request to the existing `/connect/communities/communityId/managed-topics` resource with the updated Managed Topic Input or with the `managedTopicType` parameter set to `Content`.

Get content managed topics

To get one topic, make a GET request to the existing `/connect/communities/communityId/managed-topics/managedTopicId` resource.

To get all topics, make a GET request to the existing `/connect/communities/communityId/managed-topics` resource, with the `managedTopicType` parameter set to `Content`.

Delete content managed topics

Make a DELETE request to the existing `/connect/communities/communityId/managed-topics/managedTopicId` resource.

List Share

Get share data for a list view

Make a GET request to the new `/connect/list-shares/listViewId` resource.

Share a list view with groups

Make a PUT request to the new `/connect/list-shares/listViewId` resource.

Delete a list view's share data

Make a DELETE request to the new `/connect/list-shares/listViewId` resource.

Get data on all groups, and all potential groups, a list view is shared with

Make a GET request to the new `/connect/list-share-recipients` resource.

Live Message

Get Live Message channels

Make a GET request to the new `/connect/livemessage/channels` resource.

Manage a Live Message channel

Make a POST request to the new `/connect/livemessage/channels` resource with the new Live Message Channel Input request body.

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](#).

All the Next Best Action resources, even resources introduced in version 43.0, now have a minimum version of 44.0. All the properties of the related request and response bodies also have a minimum version of 44.0.

Execute a strategy

Make a POST request to the existing `/connect/recommendation-strategies/strategyName/recommendations` resource.

This resource no longer supports GET requests.

Social Engagement

Get a managed social account that is in the org and assigned to the user

Make a GET request to the new `/connect/social-engagement/managed-social-accounts/id` resource.

Get a list of managed social accounts that are in the org and assigned to the user

Make a GET request to the new `/connect/social-engagement/managed-social-accounts` resource.

Social Engagement Setup

Get managed social accounts from a recently authenticated social network

Make a GET request to the new `/connect/social-engagement/setup/managed-social-accounts` resource.

Add managed social accounts from a recently authenticated social network

Make POST request to the new `/connect/social-engagement/setup/managed-social-accounts` resource.

Get a social account

Make a GET request to the new `/connect/social-engagement/setup/managed-social-accounts/id` resource.

Manage a social account

Make a PATCH request to the new `/connect/social-engagement/setup/managed-social-accounts/id` resource with the new Managed Social Account Setup Input request body.

Delete a social account

Make a DELETE request to the new `/connect/social-engagement/setup/managed-social-accounts/id` resource.

Enable and disable social customer service

Make a GET or DELETE request to the new `/connect/social-engagement/setup` resource.

Get and accept the terms of service

Make a PUT or PATCH request to the new `/connect/social-engagement/terms-of-service` resource.

New and Changed Chatter REST API Request Bodies

These request bodies are new or have changes.

Chatter Feeds

Comment Input

This request body has one new property.

- `threadParentId`—ID of the parent comment for a threaded comment.

Feed Element Capabilities Input

This request body has one new property.

- `status`—Change the status of a feed post or comment.

Status Capability Input

This request body has one changed property.

- `feedEntityStatus`—Now includes the `Draft` value.

List Share

List Current Share Collection Input

This new request body has one property.

- `currentListShares`—List of 15-character IDs that identify the groups or roles with which to share the list.

Live Message

Live Message Channel Input

This new request body has these properties.

- `messageType`—Type of channel.
- `messagingPlatformKey`—ID of the message channel on the external service. This value can be found in the GET response.

Managed Topics

Managed Topic Input

This request body has one changed property.

- `managedTopicType`—Now includes the `Content` value.

Next Best Actions (Pilot)

Next Best Action Strategy 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.
- `maxResults`—Maximum number of results. Valid values are from 1 to 25. The default is 3.
- `strategyContext`—Variable and value mappings for the strategy.

Social Customer Service

Social Customer Service Configuration Input

This new request body has these properties.

- `callbackUrl`—Callback URL used to generate tenant setup URL.
- `inboundApexHandlerId`—ID of the inbound Apex handler that is responsible for inserting any records as a result of inbound social data. Default value is `null` and uses the default inbound Apex handler provided by Social Customer Service.
- `inboundParentPostEnabled`—Indicates whether the parent post of an inbound post should also be sent to your org. The parent post represents the social post that this post is replying to. Default value is `false`.
- `runAsUserId`—ID of the user that is executing your inbound Apex handler. Default value is the ID of the context user.
- `socialPublishingApprovalEnabled`—Indicates whether some agents require approval to publish on social networks. Default value is `false`.

Social Engagement

Managed Social Account Setup Input

This new request body has these properties.

- `managedAccountId`—ID for this managed account in a third-party system (for example, Social Studio).
- `parentProviderUserId`—User ID of the user on the social network if the managed social account is a fan page (for example, a Facebook fan page).
- `providerUserId`—User ID of the user on the social network, or the Page ID of the page if the managed social account is a fan page.
- `socialNetwork`—Social network that this account belongs to.
- `status`—Status of this managed social account.

New and Changed Chatter REST API Response Bodies

These response bodies are new or have changes.

Chatter Feeds

Comment

This response body has these new properties.

- `threadLevel`—Level of nesting for a comment. 0 indicates a standard comment with a parent post. 1 indicates a threaded comment with a parent comment and a parent post. 2 indicates a threaded comment with two parent comments and a parent post. The UI is limited to these three levels.
- `threadParentId`—ID of the parent comment for a threaded comment.

Comment Capabilities

This response body has one new property.

- `comments`—If a comment has this capability, it has threaded comments.

Comment Page

This response body has these new properties.

- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Chatter REST API URL identifying the previous page, or `null` if there isn't a previous page.

Collaborative Forecasts

Forecasting Ancestors

This new response body replaces Forecasting Manager Ancestors and has these properties.

- `ancestors`—List of parent user nodes.
- `url`—URL endpoint that was accessed.
- `roleId`—Unique identifier of the forecasting user's role attached to this profile.

Forecasting Manager

This response body has these new properties.

- `territory2Id`—Unique identifier of the territory attached to this profile.
- `territory2Name`—Name of the territory attached to this profile.

Forecasting Manager Ancestors

Forecasting Ancestors replaces this response body.

Forecasting My Forecasts

This new response body has these properties.

- `formattedLabel`—For territory-based forecast types, the composite label of the user and the territory. For role-based forecast types, the user's full name.
- `territory2Id`—For territory-based forecast types, the unique identifier of the territory attached to this profile. For role-based forecast types, this property is blank.
- `territory2Name`—For territory-based forecast types, the name of the territory attached to this profile. For role-based forecast types, this property is blank.
- `userId`—Unique identifier of the forecasting user.
- `roleId`—Unique identifier of the forecasting user's role attached to this profile.

Forecasting My Forecasts Collection

This new response body has these properties.

- `forecastManagerList`—For territory-based forecast types, a list of territories that the context user is a forecast manager of. For role-based forecast types, the context user, if the context user is a forecast manager in the role hierarchy.
- `representativeList`—For territory-based forecast types, a list of territories that the context user is assigned to but that have no forecast manager. For role-based forecast types, the context user, if the context user is part of the role hierarchy and not a forecast manager.
- `sharedList`—List of users that have shared their forecasts with the context user. `null` for territory-based forecast types.

- `url`—URL endpoint that was accessed.
- `viewAllForecastsList`—For territory-based forecast types, a list of territories and their respective forecast managers at the top level of the territory hierarchy. For role-based forecast types, a list of users at the top level of the role hierarchy.

Forecasting User

This response body has these new properties.

- `displayLabel`—Label of an entry in the user's dropdown menu on the forecasts page.
- `territoryId`—ID of a territory that's included in the user's dropdown menu on the forecasts page.
- `territoryName`—Name of a territory that's included in the user's dropdown menu on the forecasts page.

Folders

Folder Share Link

This new response body has this property.

- `folderViewUrl`—URL where the folder can be viewed. This value is also called the folder share link.

List Share

List Share

This new response body has these properties.

- `groupId`—ID for the group or role that the list is shared with.
- `label`—Label for the group or role.

List Share Category

This new response body has these properties.

- `imageColor`—Color of the image for the recipient.
- `imageUrl`—URL of the image for the recipient.
- `shareLabel`—Translated label to show in the UI for this category of shares.
- `shareType`—Type of group a list view is shared with.
- `shares`—List of structures for shared groups.
- `shareListComplete`—Indicates whether the shares list contains all available results (`true`) or not (`false`).

List Share Collection

This new response body has these properties.

- `availableListShares`—Share categories that the list can be shared with.
- `currentListShares`—Share categories that the list is shared with.

List Current Share Collection

This new response body has these properties.

- `currentListShares`—List of share categories that the list is currently shared with.

Live Message

Live Message Channel

This new response body has these properties.

- `developerName`—Unique developer name of the channel.
- `id`—ID of the message channel, if it is added to the org.

- `isActive`—Indicates whether the channel is currently active (`true`) or not (`false`).
- `masterLabel`—User friendly name of the channel.
- `messageType`—Type of channel.
- `messagingPlatformKey`—User friendly name of the channel.

Live Message Channels

This new response body has these properties.

- `channels`—Live Message channels.
- `cursor`—Live Message page cursor.

Managed Topics

Managed Topic Collection

This response body has this new property.

- `nextPageUrl`—Chatter REST API URL identifying the next page, or `null` if there isn't a next page.

Next Best Actions (Pilot)

Next Best Action Flow Action

This new response body has these properties.

- `id`—ID of the proposition.
- `name`—Name of the proposition.
- `parameters`—List of parameters to pass to the action.
- `type`—Type of action.

Next Best Action Parameter

This new response body has these properties.

- `name`—Name of the parameter.
- `type`—Type of the parameter.
- `value`—Value of the parameter.

Next Best Action Proposition Recommendation

This new response body has these properties.

- `id`—ID of the proposition.
- `name`—Name of the proposition.
- `type`—Type of target.
- `url`—URL to the proposition.

Next Best Action Recommendation

This new response body has these properties.

- `acceptanceLabel`—Text indicating user acceptance of the recommendation.
- `actionReference`—Reference to the action to perform, for example, launching a flow.
- `description`—Description of the recommendation.
- `id`—ID of the recommended entity.
- `imageUrl`—URL to the asset file to display.
- `name`—Name of the recommended entity.

- `rejectionLabel`—Text indicating user rejection of the recommendation.
- `target`—Target to act on.
- `targetAction`—Action to recommend.
- `url`—URL to the recommended entity.

Next Best Action Recommendation Proposition

This response body was removed.

Proposition

This response body has these new properties.

- `acceptanceLabel`—Text indicating user acceptance of the recommendation.
- `image`—Image to display.
- `rejectionLabel`—Text indicating user rejection of the recommendation.

Social Engagement

Managed Social Account

This new response body has these properties.

- `defaultResponseAccountId`—Default response account to use when replying to posts sent to this account.
- `displayName`—Real name (or user name if real name not available) for this account on the social network.
- `externalPictureUrl`—URL to the account's avatar image.
- `id`—Internal SFDC ID for this managed social account.
- `label`—Label for the social account.
- `profileUrl`—URL to the account's profile.
- `socialNetwork`—Social network that this account belongs to.
- `uniqueName`—Unique name used for distinguishing same name fan pages; acts like a user name for a fan page.
- `username`—Unique user name or handle for this account on the social network.

Managed Social Accounts

This new response body has this property.

- `managedSocialAccounts`—List of managed social accounts that are in the org and assigned to the user.

Managed Social Account Setup

This new response body has these properties.

- `authorizedByUsername`—Authorized-by user name used for displaying authorized name in fan pages.
- `defaultResponseAccountId`—Default response account to use when replying to posts sent to this account.
- `displayName`—Real name (or user name if real name not available) for this account on the social network.
- `externalPictureUrl`—URL to the account's avatar image.
- `id`—Internal SFDC ID for this managed social account.
- `isActive`—Indicates whether the account is considered active (`true`) or not (`false`).
- `isAuthenticated`—Indicates whether the account is authenticated (`true`) or needs to be reauthenticated (`false`).
- `label`—Label for the social account.
- `managedAccountId`—ID for this account in a third-party system (for example, Social Studio).
- `parentProviderUserId`—User ID of the user on the social network if the managed social account is a fan page (for example, a Facebook fan page).

- `profileUrl`—URL to the account's profile.
- `providerUserId`—User ID of the user on the social network, or the Page ID of the page if the managed social account is a fan page.
- `socialNetwork`—Social network that this account belongs to.
- `status`—Status of this managed social account.
- `uniqueName`—Unique name used for distinguishing same name fan pages; acts like a user name for a fan page.
- `username`—Unique user name or handle for this account on the social network.

Managed Social Accounts Setup

This new response body has this property.

- `managedSocialAccounts`—List of managed social account setup entities.

Managed Social Account Setup Authentication

This new response body has this property.

- `oauthJWT`—JSON web token (JWT). This JWT must be in the form field (`tokenString`) when you POST to the OAuth URL. This token expires every 60 seconds, so fetch it on demand.
- `oauthUrl`—OAuth URL. POST to this URL to begin the OAuth process. The response to a POST request is an HTML page.

Social Customer Service Configuration

This new response body has this property.

- `inboundApexHandlerId`—ID of the Apex class that handles inbound social data.
- `isInboundParentPostEnabled`—Indicates whether a social post's parent should be sent to this org.
- `isPackageInstalled`—Indicates whether a Social Customer Service package is installed to this org.
- `isSocialPublishingApprovalEnabled`—Indicates whether some agents require approval before publishing social posts.
- `isTenantConnectionValid`—Indicates whether the tenant connection is valid. This value is `true` if we're able to connect to Social Studio and `false` if you need to reauthenticate to Social Studio using the `setupTenantUrl` response parameter.
- `managedSocialAccountCount`—Current number of social accounts that this org has.
- `managedSocialAccountLimit`—Maximum number of social accounts that this org is allowed to have.
- `runAsUserId`—ID of the context user.
- `setupTenantUrl`—Setup tenant URL used to direct the user's browser to authorize their tenant.
- `tenantType`—Type of tenant in this org (for example, Starter). Null if no tenant is configured.

Terms of Service

This new response body has this property.

- `acceptingUserId`—ID of the user who accepted the terms of service. Specify `null` if not accepted.
- `termsOfServiceUrl`—URL for the terms of service page.

Users

User Detail

For performance reasons, this response body no longer returns the `stamps` property. To get a user's stamps in version 44.0 and later, use SOQL.

User Summary

For performance reasons, this response body no longer returns the `stamps` property. To get a user's stamps in version 44.0 and later, use SOQL.

Reports and Dashboards REST API

These resources have new properties: Analytics Notifications (`/analytics/notifications/notification_ID`), Dashboards (`/analytics/dashboards/`), and Report Types (`/analytics/report-types/`).

To learn more about these changes, see the [Reports and Dashboards REST API Developer Guide](#).

Changed Resources**Analytics Notifications (`/analytics/notifications/notification_ID`)**

The `/analytics/notifications/notification_ID` resource has a new property.

Property	Type	Description
<code>type</code>	String	Type of recipient. For API version 44.0, <code>type</code> is always <code>user</code> . Available in API version 44.0 and later.

Dashboards (`/analytics/dashboards/`)

The `/analytics/dashboards/dashboard_ID/describe/` resource has a new property.

Property	Type	Description
<code>decimalPrecision</code>	Integer	The number of decimal places included in a dashboard metric, chart, or table, 0–5. If -1 or null, Salesforce automatically sets the number of decimal places.

Reports (`/analytics/reports/`)

The `/analytics/reports/report_ID/describe` resource has a new property.

Property	Type	Description
<code>supportsJoinedFormat</code>	Boolean	Based on its report type, specifies whether a report is compatible with joined reports (<code>true</code>) or not (<code>false</code>).

Report Types (`/analytics/report-types/`)

The `/analytics/report-types/` resource has these new properties.

Property	Type	Description
<code>description</code>	String	Optional. A description of the report type.
<code>supportsJoinedFormat</code>	Boolean	Specifies whether a report type is compatible with joined reports (<code>true</code>) or not (<code>false</code>).

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. Now you can allow users to choose how much white space they prefer in their user interface.

IN THIS SECTION:

[Change the Density of the User Interface](#)

Allow users to choose how much white space they prefer in the user interface.

[Other User Interface API Changes](#)

We also made some small but significant changes to User Interface API.

Change the Density of the User Interface

Allow users to choose how much white space they prefer in the user interface.

Where: This preference is exposed in the `density` property in the Theme Representation, which is returned from a GET request to `/ui-api/themes/active`.

- `viewOne`—User interface elements have a lower density on the page, which means they have more white space between them. In Lightning Experience, this setting is called **Comfy**.
- `viewTwo`—User interface elements have a higher density on the page, which means they have the least amount of white space between them. In Lightning Experience, this setting is called **Compact**.

SEE ALSO:

[Change Your View with Display Density Settings](#)

Other User Interface API Changes

We also made some small but significant changes to User Interface API.

Navigation Item Response Body Includes Object Labels

The Navigation Item response body now includes these properties.

- `objectLabel`—Singular label for the object that corresponds to the navigation item.
- `objectLabelPlural`—Plural label for the object that corresponds to the navigation item.

System and User Information Available on Records

The Record Representation now includes these properties.

- `lastModifiedById`—The ID of the user who last updated this record.
- `lastModifiedDate`—The date and time when a user last modified this record. Date and time information is in ISO 8601 format.
- `systemModstamp`—The date and time when a user or an automated process (such as a trigger) last modified this record. Date and time information is in ISO 8601 format.

Record Collection Response Includes Page Tokens

The `/ui-api/records/{recordId}/child-relationships/{relationshipName}` resource now supports a `pageToken` query parameter.

The Record Collection response body now includes these properties.

- `currentPageToken`—Token identifying the current page.

- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.

Lightning Quick Action and Salesforce Classic Publisher JavaScript APIs

Get the available actions for a page and the action's fields with new methods for the `lightning:quickActionAPI` component. Use the 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.

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

How: The following methods are new.

- `getAvailableActions`—Get a list of the available actions on a record page.
- `getAvailableActionFields`—Get a list of the available fields for a specific action on a record page.

SEE ALSO:

[Publisher and Quick Action Developer Guide \(can be outdated or unavailable during release preview\)](#)

Salesforce Console API

More of the Salesforce Console Integration Toolkit JavaScript APIs are available in the Lightning Console JavaScript API. Generate and open console URLs, and set a navigation item to a specific ID.

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

How: The following methods are new in API version 44.0.

`setSelectedNavigationItem()`

Sets the navigation item.

`generateConsoleUrl()`

Generates a URL to a workspace tab and its subtabs.

`openConsoleUrl()`

Opens a URL generated by `generateConsoleUrl()`.

Open CTI API

The `onNavigationChange()` method is now invoked when users create a case record and the new case is viewed in the same tab. The methods to set softphone size in Lightning Experience have higher maximums.

`onNavigationChange()`

The method is now also invoked whenever a console tab is refreshed. Previously, a user would have to click into a different tab then click back into the original to invoke the `onNavigationChange()` method. For example, when you create a new case in a console, that tab is refreshed when you save it. The new case, previously, would not have invoked the method. With this update, the case loaded in that tab will invoke the method. This allows CTI providers to log a call against newly created case records.

setSoftphonePanelHeight ()

The maximum value has been increased to 2560 pixels.

setSoftphonePanelWidth ()

The maximum value has been increased to 1920 pixels.

For more information, see the *Open CTI Developer Guide*.

Custom Metadata Types: Storing Formula Parameters to Consolidate Updates, Editing Records in Memory Within Apex

Reference records of custom metadata types in formula fields to avoid hardcoding and make updates easier. Create and edit custom metadata type records in memory in Apex to make testing easier.

IN THIS SECTION:

[Reference Custom Metadata Types in Advanced Formula Fields](#)

Create a custom metadata type, and reference its records in an advanced formula field. Store parameters for your formula in custom metadata types. If you need to make a change, you can do so in your custom metadata type instead of changing multiple, hard-coded formulas.

[Instantiate Custom Metadata Types in Apex](#)

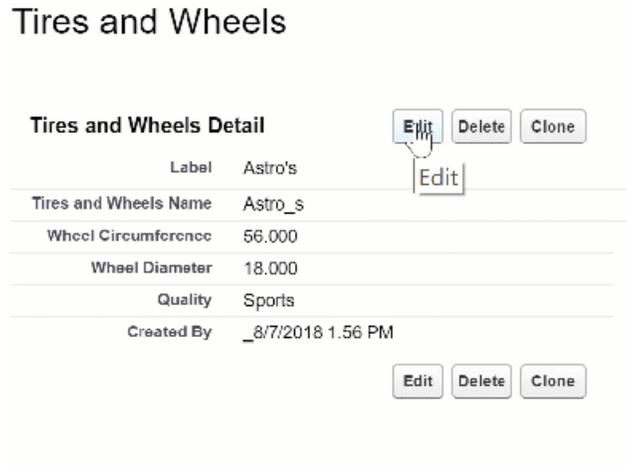
You can now edit custom metadata records in memory within Apex. Previously, custom metadata records queried with SOQL in Apex were immutable. Audit fields (`CreatedDate`, `CreatedBy`, `LastModifiedDate`, `LastModifiedBy`, `SystemModStamp`) and calculated fields remain uneditable. DML operations aren't allowed on custom metadata in Apex or the Partner or Enterprise APIs. DML operations can be done with the Apex Metadata API.

Reference Custom Metadata Types in Advanced Formula Fields

Create a custom metadata type, and reference its records in an advanced formula field. Store parameters for your formula in custom metadata types. If you need to make a change, you can do so in your custom metadata type instead of changing multiple, hard-coded formulas.

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 in installed package types.

Why: Let's say you have several formulas that pertain to wheel sizes. Some formulas perform calculations to confirm that the wheel circumference size is accurate, while others perform vehicle drive-train calculations. If the wheel dimensions for a specific brand change, you can update your custom metadata type rather than the individual formulas.



Instantiate Custom Metadata Types in Apex

You can now edit custom metadata records in memory within Apex. Previously, custom metadata records queried with SOQL in Apex were immutable. Audit fields (`CreatedDate`, `CreatedBy`, `LastModifiedDate`, `LastModifiedBy`, `SystemModStamp`) and calculated fields remain uneditable. DML operations aren't allowed on custom metadata in Apex or the Partner or Enterprise APIs. DML operations can be done with the Apex Metadata API.

Where: This change applies to Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Professional Edition orgs can create, edit, and delete custom metadata records only in installed package types.

How: In this example, the first method is instantiating a custom metadata record, but no records are inserted into memory. The second method retrieves a record, changes it, and returns it to the caller, but the change is not updated in the database.

```
public class CustomMetadataService {

    public CustomMetadataService() {}

    /**
     * This method instantiates a custom metadata record of type MyCustomMetadataType__mdt
     * and sets the DeveloperName to the input String.
     * Note that the record is not inserted into the database,
     * and would not be found by a SOQL query.
     */
    public MyCustomMetadataType__mdt getCustomMetadataRecord(String myName) {
        MyCustomMetadataType__mdt theRecord = new MyCustomMetadataType__mdt();
        theRecord.DeveloperName = myName;
        return theRecord;
    }

    /**
     * This method retrieves a custom metadata record, changes a field, and returns it
     * to the caller. Note that the changed record is not updated in the database.
     */
    public MyCustomMetadataType__mdt getChangedCustomMetadataRecord(String myNewName) {
        MyCustomMetadataType__mdt theRecord = [SELECT Id, DeveloperName from
        MyCustomMetadataType__mdt LIMIT 1];
        theRecord.DeveloperName = myNewName;
    }
}
```

```
        return theRecord;
    }
}
```

SEE ALSO:

[Apex Developer Guide](#)

Salesforce Extensions for VS Code: Development and Live Debugging Simulations for Any Org, and New Apex Test View

In addition to the changes we've made in weekly releases, Salesforce Extensions for VS Code v44 includes some major enhancements. Simulate a live debugging session in any org with Replay Debugger. Connect to sandboxes and production orgs to retrieve and deploy source. And explore a new Apex test view. These features are available when Salesforce Extensions for VS Code v44 is released on October 13, 2018, and some functionality is available sooner.

For information about getting started with Salesforce Extensions for VS Code, see the [Salesforce Extensions for VS Code documentation](#) in the Visual Studio Code Marketplace. To see all the VS Code extensions that Salesforce has published, visit our [publishers page](#) 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:

[Develop Against Any Org in Visual Studio Code \(Beta\)](#)

Connect to any org to retrieve and deploy source from Visual Studio Code. Previously, you could use Salesforce Extensions for VS Code only with scratch orgs. Salesforce Extensions for VS Code is the flagship development environment for customizing Salesforce with code. The ability to connect to and develop against any org enables you to start using Visual Studio Code, even if you don't work exclusively with scratch orgs.

[Debug All Your Orgs for Free with Apex Replay Debugger \(Generally Available\)](#)

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. With this release, we added checkpoints, which provide more information about your variables than debug logs do.

[Explore Your Apex Tests in Visual Studio Code](#)

See your test results at a glance, and jump from those results to your test code in Visual Studio Code. When Apex tests fail, you can jump from the test results straight to the line that contains the failed assert statement. When Apex tests succeed and you want to remind yourself what you were testing, you can jump to the method definitions for those tests. You can also see which test methods are in your test classes from the testing sidebar.

Develop Against Any Org in Visual Studio Code (Beta)

Connect to any org to retrieve and deploy source from Visual Studio Code. Previously, you could use Salesforce Extensions for VS Code only with scratch orgs. Salesforce Extensions for VS Code is the flagship development environment for customizing Salesforce with code. The ability to connect to and develop against any org enables you to start using Visual Studio Code, even if you don't work exclusively with scratch orgs.

Where: This feature applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

 **Note:** As a beta feature, the ability to use VS Code with non-source-tracked orgs 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 functionality in the [Issues section](#) of the `salesforcedx-vscode` repository on GitHub.

When: We expect to make this functionality available and to provide documentation when Salesforce Extensions for VS Code v44 is released on October 13, 2018. For updates, keep an eye on the Salesforce Extensions for VS Code [change log](#).

How: To access the Visual Studio Code command palette, press `Cmd+Shift+P` (macOS) or `Ctrl+Shift+P` (Windows or Linux). Then run these commands as needed.

- To log in to an org and set that org as the default org for your project, run `SFDX: Authorize an Org`.
- To generate a project with a manifest (with a `package.xml` file) to develop against orgs without source tracking (orgs that aren't scratch orgs), run `SFDX: Create Project with Manifest`.

To retrieve source from an org without source tracking (from an org that's not a scratch org), right-click a manifest, a source file, or a directory in the Visual Studio Code explorer. Select **SFDX: Retrieve Source from Org**. Or, right-click a file that's open in the editor, and select **SFDX: Retrieve This Source from Org**.

 **Important:** Retrieving source from an org overwrites your local versions of the source files.

To deploy source to an org without source tracking (to an org that's not a scratch org), right-click a manifest, a source file, or a directory in the Visual Studio Code explorer. Select **SFDX: Deploy Source to Org**. Or, right-click a file that's open in the editor, and select **SFDX: Deploy This Source to Org**.

 **Important:** Deploying source to an org overwrites the metadata in your org with your local versions of the source files.

To delete source from your project and from your non-source-tracked org, right-click a manifest, a source file, or a directory in the Visual Studio Code explorer. Select **SFDX: Delete from Project and Org**. Or, right-click a file that's open in the editor, and select **SFDX: Delete This from Project and Org**.

SEE ALSO:

[GitHub Issue for salesforcedx-vscode: Support for Change Set Based Development](#)

Debug All Your Orgs for Free with Apex Replay Debugger (Generally Available)

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. With this release, we added checkpoints, which provide more information about your variables than debug logs do.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

When: Apex Replay Debugger is generally available when Salesforce Extensions for VS Code v44 is released on October 13, 2018, replacing the beta version that was released in Summer '18.

Who: To view, retain, and delete debug logs and to set checkpoints, 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!

In Salesforce Extensions for VS Code v44, you can set up to five checkpoints to get heap dumps when lines of code run. All local variables, static variables, and trigger context variables have better information at checkpoints. Trigger context variables don't exist in logs and are available only at checkpoint locations.

How: In Visual Studio Code, a checkpoint is a type of breakpoint. Set up and upload your checkpoints, then start an Apex Replay Debugger session. Be sure to start a session soon after uploading the checkpoints, because checkpoints expire after 30 minutes.

1. Set checkpoints on up to five lines in Apex classes or triggers.
 - a. Click the line of code where you want to set the checkpoint.
 - b. Open the command palette (press `Cmd+Shift+P` on macOS or `Ctrl+Shift+P` on Windows or Linux).
 - c. Run *SFDX: Toggle Checkpoint*.

Or, right-click in the gutter to the left of the line numbers, select **Add Conditional Breakpoint > Expression**, and set the expression to *Checkpoint*.

Or, to convert an existing breakpoint into a checkpoint, right-click the breakpoint, and select **Edit Breakpoint > Expression**. Set the expression to *Checkpoint*.

2. To upload your checkpoints to your org so that heap dump information can be collected, open the command palette, and run *SFDX: Update Checkpoints in Org*.
3. Set up an Apex Replay Debugger session, run the code you want to debug, and debug your code. See the [Apex Replay Debugger for Visual Studio Code documentation](#) for more information.

As you step through your code during a debugging session, Apex Replay Debugger provides details about your variables from heap dumps on lines where heap dumps are available. Be sure to debug your code soon after starting the session, because heap dumps expire about a day after you generate them.

You can use this debugger only in your orgs. ISV customer debugging is unavailable in Apex Replay Debugger. To debug customers' orgs, use [ISV Customer Debugger](#).

SEE ALSO:

[Salesforce CLI: Join the Evolution](#)

[Apex Developer Guide: Trigger Context Variables](#)

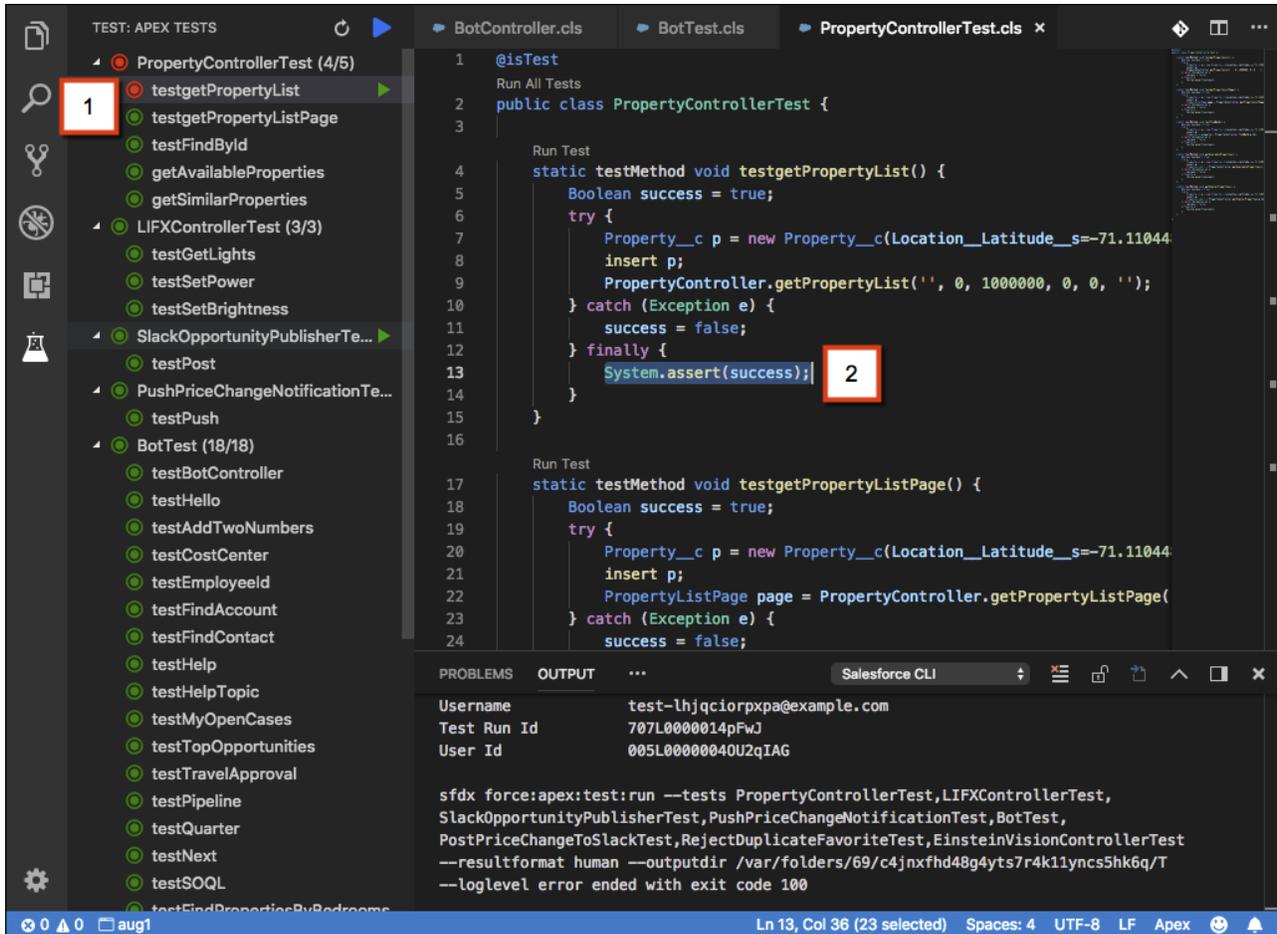
Explore Your Apex Tests in Visual Studio Code

See your test results at a glance, and jump from those results to your test code in Visual Studio Code. When Apex tests fail, you can jump from the test results straight to the line that contains the failed assert statement. When Apex tests succeed and you want to remind yourself what you were testing, you can jump to the method definitions for those tests. You can also see which test methods are in your test classes from the testing sidebar.

Where: This feature applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Enterprise, Performance, Unlimited, Developer, and Database.com editions.

When: We expect to make this functionality available (and to provide documentation) when Salesforce Extensions for VS Code v44 is released on October 13, 2018, or possibly earlier. For updates, keep an eye on the Salesforce Extensions for VS Code [change log](#).

Why: See and run your Apex tests (1), and jump from the test names to the corresponding lines in your code (2).



Salesforce CLI: Join the Evolution

The Salesforce command-line interface (CLI) continues to evolve with more features and commands that support the Salesforce DX development models. Use it 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 v44 is released on October 13, 2018.

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

We release changes to Salesforce CLI regularly. Read the weekly release notes to learn about recent updates for [version 44 of the CLI](#). These commands and parameters have changed in version 44 or during version 43 weekly updates. For more information, see [version 44 of the Salesforce CLI Command Reference](#).

Uninstall the Pre-Release Version of the CLI

If you installed the pre-release version 44 of the CLI, uninstall it, then run the `update` command.

```
sfdx plugins:uninstall salesforcedx
```

```
sfdx update
```

New Commands

These new commands are available in Salesforce CLI v44.

The `force:source:deploy`, `force:source:retrieve`, and `force:source:delete` commands work on sandboxes, Developer Edition orgs, and trial orgs, but not production orgs. For production orgs, continue to use `force:mdapi:deploy` and `force:mdapi:retrieve`.

force:source:delete (beta)

Deletes metadata from a non-source-tracked org, such as a sandbox, and from your local project. You can indicate a comma-delimited list of local paths or of individual metadata components.

force:source:deploy (beta)

Deploys source from your project to a non-source-tracked org. Unlike the `force:source:push` command for scratch orgs (source-tracked orgs), you indicate the specific set of metadata to deploy. This command overwrites all corresponding metadata in the org with the deployed local files.

force:source:retrieve (beta)

Retrieves source from a non-source-tracked org to your project. Unlike the `force:source:pull` command for scratch orgs (source-tracked orgs), with `force:source:retrieve` you indicate the specific set of metadata to retrieve. This command overwrites all local files with the metadata retrieved from the org.

 **Note:** As a beta feature, the non-source-tracked org commands are a preview and aren'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 non-source-tracked org commands in the [Salesforce DX Trailblazer Community](#).

The Scratch Org Snapshot commands are available as part of an invitation-only pilot in late October 2018.

force:org:snapshot:create (pilot)

Creates a snapshot of an existing scratch org to use as a basis for scratch org creations. A snapshot reflects the state of a scratch org when the snapshot is created. It contains scratch org shape information (edition, features, and licenses), installed packages, metadata, and test data.

force:org:snapshot:delete (pilot)

Deletes a snapshot.

force:org:snapshot:get (pilot)

Returns information for a specified snapshot.

force:org:snapshot:list (pilot)

Lists all snapshots associated with a Dev Hub.

 **Note:** We provide Scratch Org Snapshot 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. Scratch Org Snapshot 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. For information on enabling this feature in your org, contact Salesforce.

Changed Commands

The functionality for these commands changed in Salesforce CLI v44.

force:mdapi:convert

This command escapes double quotes when converting from Metadata API format to the source format.

force:package:install, force:package:uninstall

If you run these commands using the package version alias, you must run them from within a Salesforce DX project folder. If you specify the package version ID (which starts with 04t), you can run them outside of a DX project.

force:package:version:list

The output includes a new column that indicates whether the package version is protected by an installation key.

force:source:push

Deployment errors show the project path.

force:source:pull

If a metadata name has special characters (such as forward slashes, backslashes, quotation marks), we encode the file name on the local file system for all operating systems. For example, if you pull a custom profile called `Custom: Marketing Profile`, the colon is encoded in the resulting file name.

```
Custom%3A Marketing Profile.profile-meta.xml
```

If you reference a file name with special characters in `.forceignore`, use the encoded file name.

If you use package version IDs instead of aliases, you can now use 04t package IDs for all `force:package:version` commands instead of a mix of 04t (subscriber package version) and 05i (package version) IDs. However, we strongly recommend using aliases for all `force:package` commands and in the `sfdx-project.json` file.

- The output displays only the 04t IDs for `package:version:create`, `package:version:update`, `package:version:list`, and `package:version:report`.
- You can use either 04t or 05i IDs when running `package:version:update`, `package:version:promote`, or `package:version:report`.
- You can use either 04t or 05i IDs as the ancestor ID in the `sfdx-project.json` file.
- You can view 05i IDs for `package:version:list` and `package:version:report` if you use the `--verbose` parameter.

New Parameters

This command has a new parameter in Salesforce CLI v44.

force:project:create

Use the `--manifest | -x` parameter to generate a default manifest (`package.xml`) for fetching Apex, Visualforce, Lightning components, and static resources.

Changed Parameters

These parameters have changed in Salesforce CLI v44.

force:package:create --path | -r

The `--path | -r` parameter is required. This parameter ignores trailing slashes. For example, the CLI treats both `force-app` and `force-app/` the same.

force:package:version:update

We renamed several parameters to make them consistent with the parameters for `force:package:version:create`.

Previous Parameter	Current Parameter
<code>--name -n</code>	<code>--versionname -a</code>
<code>--description -d</code>	<code>--versiondescription -e</code>
<code>--package2versionid -i</code>	<code>--package -p</code>

Package Version in Salesforce DX Project File

You can indicate a package version with a build number when defining a dependent package in the `sfdx-project.json` file. Previously, you had to indicate the `LATEST` keyword as the build number.

```
"dependencies": [
  {
    "package": "0Hoxxx",
    "versionNumber": "1.1.0.3"
  }
]
```

New Environment Variable

Normally, when you run some CLI commands, a temporary directory with all the metadata is created then deleted upon successful completion of the command. However, retaining these files can be useful for several reasons. You can debug problems that occur during command execution. You can use the generated `package.xml` when running subsequent commands, or as a starting point for creating a manifest that includes all the metadata you care about.

To retain all the metadata in a specified directory path when you run these commands, set the `SFDX_MDAPI_TEMP_DIR` environment variable:

- `force:source:deploy`
- `force:source:retrieve`
- `force:source:delete`
- `force:source:push`
- `force:source:pull`
- `force:source:convert`
- `force:org:create` (if your scratch org definition contains scratch org settings, not org preferences)

Example:

```
SFDX_MDAPI_TEMP_DIR=/users/myName/myDXProject/metadata
```

IN THIS SECTION:

[Build Your Own Salesforce CLI Plug-In to Get Just What You Need \(Generally Available\)](#)

Plug-ins add functionality to Salesforce CLI. Salesforce provides several plug-ins when you install the CLI that provide commands and functionality to meet common needs that customers and partners have. You can also choose to install other plug-ins built by Salesforce and others. But when you have requirements that existing plug-ins don't meet, Salesforce Plug-In Generator simplifies building your own using Node.js.

SEE ALSO:

[Upgrade Flow Files to API Version 44.0 with the Salesforce CLI](#)

Build Your Own Salesforce CLI Plug-In to Get Just What You Need (Generally Available)

Plug-ins add functionality to Salesforce CLI. Salesforce provides several plug-ins when you install the CLI that provide commands and functionality to meet common needs that customers and partners have. You can also choose to install other plug-ins built by Salesforce and others. But when you have requirements that existing plug-ins don't meet, Salesforce Plug-In Generator simplifies building your own using Node.js.

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

When: Salesforce Plug-In Generator is generally available as of December 6, 2018.

How: For information about using Salesforce Plug-In Generator to create your own plug-in, check out the [Salesforce CLI Plug-In Developer Guide](#).

Sandboxes: Asset Files in Full Sandboxes

Asset files are included in full sandbox copies, so you can test your branding images and reproduce the look and feel of your communities.

IN THIS SECTION:

[Include Asset Files in Full Sandbox Tests](#)

Do you test Lightning apps or Community templates in a sandbox? Asset files are now supported in full sandboxes, so you can verify how your branding images are being deployed. You can see how your logo appears in your app, and proof your header and footer images in your Community template. Test changes to your branding imagery before you roll out new logos and other updates.

EDITIONS

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

Include Asset Files in Full Sandbox Tests

Do you test Lightning apps or Community templates in a sandbox? Asset files are now supported in full sandboxes, so you can verify how your branding images are being deployed. You can see how your logo appears in your app, and proof your header and footer images in your Community template. Test changes to your branding imagery before you roll out new logos and other updates.

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

How: Asset files are included in full sandbox copies by default. If you're doing a full copy with a sandbox template, select **Content Body** in the template to copy asset files along with other content entities. Asset files are not supported in Partial copy, Developer, or Developer Pro sandboxes.

Dev Hub: Now Available in Developer Edition and Trial Orgs

You asked for it, and we delivered! Dev Hub is now available in trial orgs and Developer Edition orgs to try out scratch orgs and second-generation packaging.

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

When: You can enable Dev Hub in existing orgs when they are upgraded to Winter '19. You can enable Dev Hub in new trial and Developer Edition orgs starting on October 6, 2018.

Why: You no longer have to sign up for a special Dev Hub trial org that expires in 30 days. Developer Edition orgs don't expire as long as they remain active. In a trial or Developer Edition Dev Hub, you can create up to 6 scratch orgs and package versions per day, with a maximum of 3 active scratch orgs.

 **Note:** Trial orgs expire on their expiration date. Developer Edition orgs that are inactive for 365 days are deactivated.

Use a Developer Edition or trial Dev Hub to practice:

- Using the Salesforce CLI.
- Creating scratch orgs as development and testing environments.
- Creating second-generation package versions.
- Setting up continuous integration using scratch orgs.

When you plan to move forward, enable Dev Hub in your production or business org because:

- You have higher daily limits for scratch orgs and package versions.
- Continuous integration jobs can require a significant amount of scratch orgs.
- Package versions are associated with your Dev Hub org. When a trial or Developer Edition org expires, you lose access to the package versions.

How:

1. Log in as System Administrator to org that you want to use as your Dev Hub.
2. From Setup, enter `Dev Hub` in the Quick Find box and select **Dev Hub**.
3. In the Dev Hub section, click **Enable**.

 **Note:** You can't enable Dev Hub in a Developer Edition org in which you have defined a namespace. You can't define a namespace in a Developer Edition org that has Dev Hub enabled.

SEE ALSO:

[Salesforce Help: Deactivate an Org](#)

Scratch Orgs: More Features and Supported Metadata Types

Designed to be ephemeral and easily recreated, scratch orgs are dedicated and configurable Salesforce environments that you can quickly spin up for many different purposes. They can be your own personal development environment, or you can create headless scratch orgs for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or have a trial Dev Hub org.

For more information, refer to the [Salesforce DX Developer Guide](#).

IN THIS SECTION:

[Configure Scratch Orgs with New Features](#)

We're providing more add-on features for scratch orgs.

[Set Allocations and Limits for Scratch Org Features](#)

Set the limit or add allocations for some scratch org features.

[Consult the Metadata Coverage Report for Source Tracking Support](#)

We discontinued the Expanded Source Tracking beta. The Dev Hub Setup page no longer includes the option to turn on Expanded Source Tracking. Launch the Metadata Coverage report to determine supported metadata for scratch org source tracking purposes. The Metadata Coverage report is the ultimate source of truth for metadata coverage across several channels. These channels include Metadata API, scratch org source tracking, unlocked packages, second-generation managed packages, and classic managed packages.

[Get More Configuration Options with Scratch Org Settings](#)

Have you ever wished that you could spin up a scratch org with a specific org setting only to find out that it wasn't supported? With scratch org settings, you can configure your scratch orgs with any Metadata API setting.

Configure Scratch Orgs with New Features

We're providing more add-on features for scratch orgs.

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

Who: You can create scratch orgs if you turned on Dev Hub in your production org, enabled Dev Hub in a Developer Edition org, or have a trial Dev Hub org.

How: Add the features to your scratch org definition file.

- ChatBot
- Entitlements
- Interaction
- IOT
- Knowledge
- LiveAgent
- LiveMessage
- ProcessBuilder
- SiteForceContributor
- Workflow

See [Scratch Org Configuration Values](#) for the complete list of supported features. For certain features, such as ApexMaxSize and MaxCustomLabels, you can optionally specify a limit.

Set Allocations and Limits for Scratch Org Features

Set the limit or add allocations for some scratch org features.

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

Who: You can create scratch orgs if you turned on Dev Hub in your production org, enabled Dev Hub in a Developer Edition org, or have a trial Dev Hub org.

How: Add the scratch org feature to your scratch org definition file.

Feature Name	Additional Allocation or Limit	Maximum	Notes
AddCustomApps	Allocation	30	Replaces CustomApps
AddCustomTabs	Allocation	30	Replaces CustomTabs
AddHistoryFieldsPerEntity	Allocation	25	
MaxApexCodeSize	Limit	To use a value greater than the default value of 10, contact Salesforce Customer Support.	Measured in millions. Setting this limit to 15 is equal to 15 million characters of code.
MaxCustomLabels	Limit	15	Measured in thousands. Setting the limit to 10 enables the scratch org to have 10,000 custom labels.

Example scratch org definition file:

```
{
  "orgName": "Acme",
  "edition": "Enterprise",
  "features": ["AddCustomApps:25", "MaxCustomLabels:10"]
}
```

Consult the Metadata Coverage Report for Source Tracking Support

We discontinued the Expanded Source Tracking beta. The Dev Hub Setup page no longer includes the option to turn on Expanded Source Tracking. Launch the Metadata Coverage report to determine supported metadata for scratch org source tracking purposes. The Metadata Coverage report is the ultimate source of truth for metadata coverage across several channels. These channels include Metadata API, scratch org source tracking, unlocked packages, second-generation managed packages, and classic managed packages.

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

Who: You can create scratch orgs if you turned on Dev Hub in your production org, enabled Dev Hub in a Developer Edition org, or have a trial Dev Hub org.

How: To access the Metadata Coverage report, go to <https://developer.salesforce.com/docs/metadata-coverage>.

Get More Configuration Options with Scratch Org Settings

Have you ever wished that you could spin up a scratch org with a specific org setting only to find out that it wasn't supported? With scratch org settings, you can configure your scratch orgs with any Metadata API setting.

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

Who: You can create scratch orgs if you turned on Dev Hub in your production org, enabled Dev Hub in a Developer Edition org, or have a trial Dev Hub org.

Why: Scratch org settings are a new format for defining org preferences in the scratch org definition. Because you can use all Metadata API settings, this format is the most comprehensive way to configure a scratch org. If a setting is supported in Metadata API, it's supported in scratch orgs. Settings provide you with fine-grained control: You can define values for all fields for a setting, rather than just enabling or disabling it.

Important: In Winter '19, you can specify scratch org settings or org preferences in your scratch org definition file, but not both. We encourage you to convert org preferences to scratch org settings in your scratch org definition. Scratch org settings provide more settings that aren't currently available as org preferences. We plan to deprecate support for org preferences in Spring '19.

How: Replace `orgPreferences` with `org settings` in the scratch org definition file.

This scratch org definition is configured using org preferences:

```
{
  "orgName": "Acme",
  "edition": "Enterprise",
  "features": ["Communities", "ServiceCloud", "Chatbot"],
  "orgPreferences": {
    "enabled": ["NetworksEnabled", "S1DesktopEnabled", "S1EncryptedStoragePref2"]
  }
}
```

Here's how the same scratch org definition looks after converting to scratch org settings:

Important: Although the settings are upper camel case in the *Metadata API Developer Guide*, be sure to indicate them as lower camel case in the scratch org definition.

```
{
  "orgName": "Acme",
  "edition": "Enterprise",
  "features": ["Communities", "ServiceCloud", "Chatbot"],
  "settings": {
    "orgPreferenceSettings": {
      "networksEnabled": true,
      "s1DesktopEnabled": true,
      "s1EncryptedStoragePref2": false
    },
    "omniChannelSettings": {
      "enableOmniChannel": true
    },
    "caseSettings": {
      "systemUserEmail": "support@acme.com"
    }
  }
}
```

With org preferences, you can only enable or disable the preferences. And you have access to only those settings that were designed to work with scratch orgs. With scratch org settings, you have access to all Metadata API settings, such as `omniChannelSettings` and `caseSettings`, that weren't available as org preferences. And what's really powerful is that you can now configure non-Boolean fields. For information on Metadata API settings and their supported fields, see [Settings](#) in *Metadata API Developer Guide*.

SEE ALSO:

[Salesforce DX Developer Guide: Scratch Org Definition Configuration](#)

Packaging: Unlocked Packages Generally Available

The generally available version has enhanced unlocked packages, including support for patch version numbers, extracting package dependency information, moving metadata between unlocked packages, and managing deprecated metadata.

IN THIS SECTION:

[Patch Version Numbers in Unlocked Packages Are Supported](#)

You can now use patch version numbers for your unlocked package versions. Previously, patch numbers were not supported and always had to be 0.

[Extract Dependency Information for Unlocked Packages](#)

For an installed unlocked package, you can now run a simple SOQL query to extract its dependency information. You can also create a script to automate the installation of unlocked packages with dependencies.

[More Metadata Components Are Hard-Deleted in Unlocked Packages](#)

Many more metadata components are now hard-deleted from the target org when deleted from an unlocked package.

[Enable Migration of Deprecated Metadata in Unlocked Packages](#)

As you start creating more unlocked packages, you might need to refactor your package and move metadata from one unlocked package to another unlocked package. You can now deprecate metadata in an unlocked package, move that metadata to a new package, and then install the new package in your production org. Upon successful installation of the new package, the deprecated metadata becomes associated with the new package. This feature simplifies that process.

[Lock Down Information During Installation of Installation-Key-Protected Unlocked Packages](#)

We are making unlocked packages more secure with this change. An installation key is required as the first step during installation, ensuring that no package information is disclosed until the correct installation key is supplied. Previously, keys were verified only at the end of the package install. Moving verification to the start of the install protects package information, like the name and components, from users who don't possess the key.

[Adopt Instanceless My Domain URL Best Practices](#)

A critical update in Spring '18 removed instance names from My Domain URLs. Update existing plug-in packages to support instanceless URLs before the critical update's auto-activation date. Replace hard-coded references with relative URLs. Going forward, build packages that support both instance and instanceless URLs.

Patch Version Numbers in Unlocked Packages Are Supported

You can now use patch version numbers for your unlocked package versions. Previously, patch numbers were not supported and always had to be 0.

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

 **Note:** This change does not extend to second-generation managed packages.

How: You can use non-zero patch versions while creating package versions. Also, in your sfdx-project.json file, you can include the NEXT or LATEST keyword with a version number in the format major.minor.patch.keyword, where patch is not 0.

 **Example:** Create a package version with patch number 12.

```
sfdx force:package:version:create --package exp-mgr --installationkey test1234
--versionnumber 4.7.12.6
```

Extract Dependency Information for Unlocked Packages

For an installed unlocked package, you can now run a simple SOQL query to extract its dependency information. You can also create a script to automate the installation of unlocked packages with dependencies.

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

Why: The SubscriberPackageVersion Tooling API object now provides dependency information. Using a SOQL query on SubscriberPackageVersion, you can identify the packages on which your unlocked package has a dependency. You can get the (04t) IDs and the correct install order for those packages.



Example: Package B has a dependency on package A. Package D depends on packages B and C. Here's a sample sfdx-project.json that you would have specified while creating a package version. Package D dependencies are noted as packages A, B, and C.

```
{
  "packageDirectories": [
    {
      "path": "pkg-a-workspace",
      "package": "pkgA",
      "versionName": "ver 4.9",
      "versionNumber": "4.9.0.NEXT",
      "default": true
    },
    {
      "path": "pkg-b-workspace",
      "package": "pkgB",
      "versionName": "ver 3.17",
      "versionNumber": "3.17.0.NEXT",
      "default": false,
      "dependencies": [
        {
          "package": "pkgA",
          "versionNumber": "3.3.0.LATEST"
        }
      ]
    },
    {
      "path": "pkg-c-workspace",
      "package": "pkgC",
      "versionName": "ver 2.1",
      "versionNumber": "2.1.0.NEXT",
      "default": false
    },
    {
      "path": "pkg-d-workspace",
      "package": "pkgD",
      "versionName": "ver 1.1",
      "versionNumber": "1.1.0.NEXT",
      "default": false,
      "dependencies": [
        {
          "package": "pkgA",
          "versionNumber": "3.3.0.LATEST"
        },
        {

```

```

        "package": "pkgB",
        "versionNumber": "3.12.0.LATEST"
      },
      {
        "package": "pkgC",
        "versionNumber": "2.1.0.LATEST"
      }
    ]
  },
  "namespace": "",
  "sfdcLoginUrl": "https://login.salesforce.com",
  "sourceApiVersion": "44.0",
  "packageAliases": {
    "pkgA": "0HoB000000080q6KAE",
    "pkgB": "0HoB000000080qBKAU",
    "pkgC": "0HoB000000080qGKAU",
    "pkgD": "0HoB000000080qGKAQ"
  }
}

```

Before installing pkgD (with ID=04txx000000082hAAA), use this SOQL query to determine its dependencies.

```

sfdx force:data:soql:query -u {USERNAME} -t
-q "SELECT Dependencies FROM SubscriberPackageVersion
WHERE Id='04txx000000082hAAA' --json

```

You see this output when you run the query, with the (04t) IDs for pkgA, pkgB, and pkgC in that order.

```

"Dependencies": {"Ids": [
  {"subscriberPackageVersionId": "04txx000000080vAAA"},
  {"subscriberPackageVersionId": "04txx000000082XAAQ"},
  {"subscriberPackageVersionId": "04txx0000000AiGAAU"}]}

```

More Metadata Components Are Hard-Deleted in Unlocked Packages

Many more metadata components are now hard-deleted from the target org when deleted from an unlocked package.

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

Why: When metadata components are deleted from an unlocked package and a new package version is created and installed, they are hard-deleted from the target org. Metadata that is not deleted is deprecated when the package is upgraded. These metadata components are now added to the list of hard-deleted metadata.

- BrandingSet
- EmailServicesFunction
- EmbeddedServiceBranding
- EmbeddedServiceConfig
- EmbeddedServiceLiveAgent
- ExternalServiceRegistration
- FeatureParameterBoolean

- FeatureParameterDate
- FeatureParameterInteger
- HomePageLayout
- InstalledPackage
- IntegrationHubSettings
- IntegrationHubSettingsType
- LicenseDefinition
- LightningComponentBundle
- LightningExperienceTheme
- LiveChatAgentConfig
- LiveChatButton
- LiveChatSensitiveDataRule
- NamedCredential
- NetworkBranding
- PermissionSetGroup
- PermissionSetLicense
- QuickAction
- RemoteSiteSetting
- UserLicense
- WaveApplication
- WaveDashboard
- WaveDataflow
- WaveDataset
- WaveLens
- WaveRecipe
- WaveTemplateBundle
- WaveXmd
- WorkflowFlowAction
- WorkflowTask(Task)

These metadata components are already supported and continue to be hard-deleted from the org when deleted from unlocked packages.

- ApexClass
- ApexComponent
- ApexPage
- ApexTrigger
- AuraDefinitionBundle
- CompactLayout
- CustomPermission
- Dashboard
- Document
- EmailTemplate

- FlexiPage
- Layout
- ListView
- MatchingRule
- PermissionSet
- Profile
- Report
- StaticResource
- WorkflowRule

For a list of all supported metadata, see [Metadata Coverage](#) in the Salesforce DX Developer Guide.

Enable Migration of Deprecated Metadata in Unlocked Packages

As you start creating more unlocked packages, you might need to refactor your package and move metadata from one unlocked package to another unlocked package. You can now deprecate metadata in an unlocked package, move that metadata to a new package, and then install the new package in your production org. Upon successful installation of the new package, the deprecated metadata becomes associated with the new package. This feature simplifies that process.

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

Why: Previously, you had to use the UI to manually remove the installed metadata from the original package because deprecate-upon-upgrade metadata was still associated with the package. You couldn't install a new package containing that metadata without the manual step.

How: For example, to move production metadata from package A to package B:

1. Identify the metadata to be moved from package A to package B.
2. Remove the metadata from package A, create a version, and release the package.
3. Add the metadata to package B, create a version, and release the package.
4. In your production org, upgrade package A.
5. In your production org, install package B.

Your metadata is now a part of package B in your production org.

Lock Down Information During Installation of Installation-Key-Protected Unlocked Packages

We are making unlocked packages more secure with this change. An installation key is required as the first step during installation, ensuring that no package information is disclosed until the correct installation key is supplied. Previously, keys were verified only at the end of the package install. Moving verification to the start of the install protects package information, like the name and components, from users who don't possess the key.

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

When: The installer UI and API changes are effective in the current release. Changes to the Salesforce CLI will be announced in a future release.

SEE ALSO:

[Tooling API New and Changed Objects](#)

Adopt Instanceless My Domain URL Best Practices

A critical update in Spring '18 removed instance names from My Domain URLs. Update existing plug-in packages to support instanceless URLs before the critical update's auto-activation date. Replace hard-coded references with relative URLs. Going forward, build packages that support both instance and instanceless URLs.

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

When: The Remove Instance Names From URLs for Visualforce, Community Builder, Site.com Studio, and Content Files critical update will be activated in all orgs on March 16, 2019.

SEE ALSO:

[Opt Out of Instanceless My Domain URLs](#)

[Salesforce Spring '18 Release Notes: Remove Instance Names from URLs for Visualforce, Community Builder, Site.com Studio, and Content Files \(Critical Update\)](#)

Enterprise Messaging: High-Volume Platform Events (Generally Available), New Lightning Component, and Change Data Capture (Generally Available)

Use events to simplify communication between business systems. This release includes enhancements for High-Volume Platform Events (Generally Available), such as usage-based entitlements and the `empApi` Lightning component, and Change Data Capture (Generally Available).

IN THIS SECTION:

[Scale Your Event-Based Apps with High-Volume Platform Events \(Generally Available\)](#)

Use high-volume platform events to publish and process millions of events efficiently. This feature was offered in the last release as a pilot. We made enhancements for this release.

[Receive Streaming Events in Your Lightning Component](#)

Turn your custom Lightning component into a streaming event listener by embedding the `lightning:empApi` component. You can subscribe to any type of event channel. The events that you can receive include platform events, PushTopic events, generic events, and Change Data Capture events.

[Keep Your External Data Up to Date with Change Data Capture \(Generally Available\)](#)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes change events, which represent changes to Salesforce records. Changes include creating a record, updating a record, deleting a record, and undeleting a record.

Scale Your Event-Based Apps with High-Volume Platform Events (Generally Available)

Use high-volume platform events to publish and process millions of events efficiently. This feature was offered in the last release as a pilot. We made enhancements for this release.

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

When: High-Volume Platform Events is generally available as of January 15, 2019.

Why: Choose the platform event type that suits your business needs. For applications that receive several million events per day, you can now create high-volume platform events. We recommend that you choose high-volume platform events because they offer better scalability than standard 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.

High-volume platform events are published asynchronously so that the system can process high loads of events efficiently. The publishing call places the publish request in a queue. The event message might not be published immediately after the call returns, but it is published when system resources are available. High-volume events are stored for up to three days, and stored events can be replayed.

Usage-Based Event Entitlements

Each Salesforce edition provides a default allocation for the number of high-volume events delivered to CometD clients. The default allocation is enforced daily to ensure fair sharing of resources in the multitenant environment and to protect the service.

You can purchase an add-on license to increase your daily CometD event delivery allocation. With the add-on license, the CometD event delivery allocation depends on your monthly entitlement and scales with it. With the add-on, you can exceed the daily-equivalent allocation of the monthly entitlement by a certain amount for a 24-hour period. Event overages are calculated for a calendar month, starting with the first day of the month or your contract start date.

Monitor your high-volume event delivery usage and entitlement with the `limits` REST API resource.

The usage-based entitlements don't apply to subscribers that don't use CometD, including Apex triggers, processes, and flows.

Receive Streaming Events in Your Lightning Component

Turn your custom Lightning component into a streaming event listener by embedding the `lightning:empApi` component. You can subscribe to any type of event channel. The events that you can receive include platform events, PushTopic events, generic events, and Change Data Capture events.

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

How: The component uses a shared CometD-based Streaming API connection, enabling you to run multiple streaming apps in the browser. Previously, you could run only one app in Salesforce that used a CometD-based streaming connection.

Keep Your External Data Up to Date with Change Data Capture (Generally Available)

Receive near-real-time changes of Salesforce records, and synchronize corresponding records in an external data store. Change Data Capture publishes change events, which represent changes to Salesforce records. Changes include creating a record, updating a record, deleting a record, and undeleting a record.

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

When: Change Data Capture is generally available as of January 15, 2019.

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 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.

Change events are based on platform events and share some of their characteristics. For example, you can replay a stream of past events that are stored for up to three days. Also, change events share the usage-based entitlements for CometD event delivery with high-volume platform events.

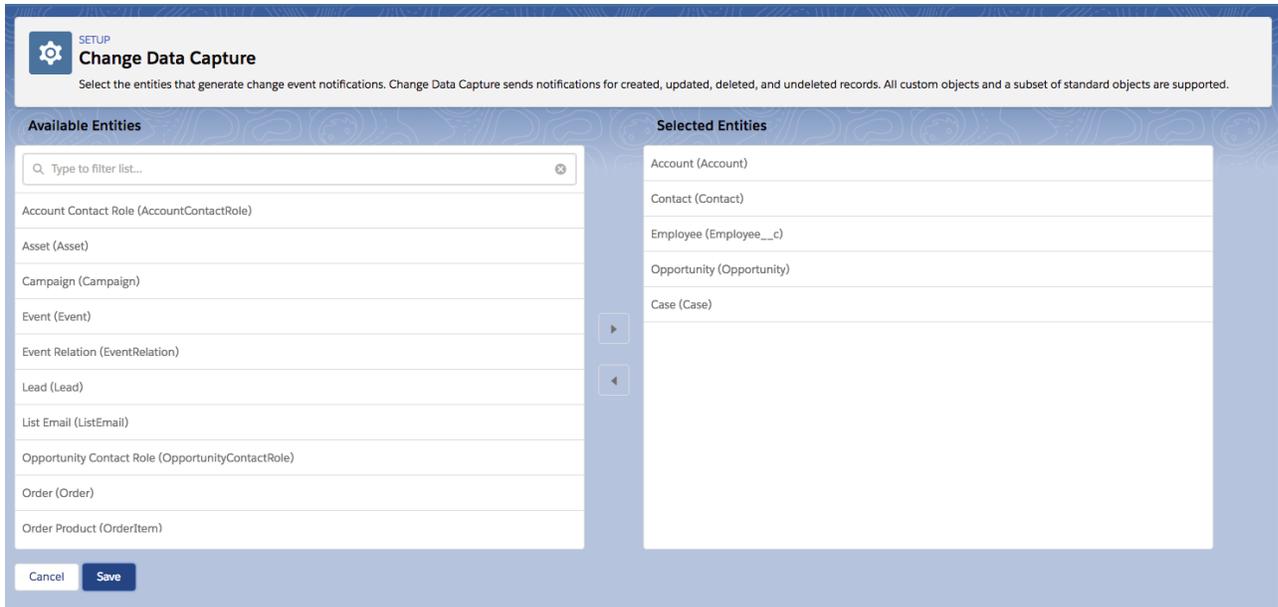
Change events are available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for from the new Change Data Capture page in Setup. The following standard objects support change events.

- Account (including Person Account)
- AccountContactRole
- Asset
- Campaign
- Case
- Contact
- ContractLineItem
- Entitlement
- Event
- EventRelation
- Lead
- ListEmail
- LiveChatTranscript
- Opportunity
- OpportunityContactRole
- Order
- OrderItem
- Product2
- Quote
- QuoteLineItem
- ServiceContract
- Task
- TaskRelation
- User (including partner users)

For this release, we made these enhancements.

Select Objects for Change Notifications

To receive notifications for record changes, select the custom objects and supported standard objects that you are interested in. From Setup, enter *Change Data Capture* in the Quick Find box, and click **Change Data Capture**.



Shield Platform Encryption Support

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).

Change events are stored in a separate data store in Salesforce for up to three days. Before being stored, they're encrypted and require you to create an Event Bus tenant secret. To enable encryption and delivery of change events, first create an Event Bus tenant secret in the Key Management page in Setup. Then, in the Encryption Policy page, select **Encrypt and deliver Change Data Capture events**.

Granular User Permissions

Previously, only the View All Data permission was enforced to subscribe to change events. In this release, the required permission depends on the channel subscribed to. If you subscribe to a specific object channel, you only need the View All permission for that object to receive change events. The View All Users permission is enforced to receive User record changes.

SHA-256 Hash Used in Data Differences

The SHA-256 hash is included in updated large text fields for which the data differences are sent. Previously, an MD5 hash was computed, but it is less robust than the SHA-256 cryptographic hash. The hash value enables you to check that the reconstructed value from the unified diff matches the original value.

New Format for the `changeOrigin` Header Field Value

The `changeOrigin` field value now includes the name and version of the Salesforce API used for the call, in addition to the client ID (if available). The format of the `changeOrigin` field is:

```
com/salesforce/api/<API_Name>/<API_Version>;client=<Client_ID>
```

The `changeOrigin` field is empty if the originator of the request is not the API (the Salesforce UI).

SEE ALSO:

[Record Encrypted Data with Change Data Capture](#)

Marketing: Multiple Business Units in Distributed Marketing and Customized Links in Facebook Posts with Social Studio

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.

- [October 2018 Release](#)
- [August 2018 Release](#)
- [June 2018 Release](#)
- [April 2018 Release](#)

SEE ALSO:

[Marketing Cloud Overview](#)

[Marketing Cloud: Earlier Release Notes](#)

[Salesforce Marketing Cloud Facebook Page](#)

Critical Updates

This release includes a new critical update for email security. And we're retiring the critical update that enforces stricter content security policy for Lightning components.

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 Winter '19.

Add a Namespace Prefix to `pageReference.state` Properties and Query Parameters

This critical update addresses an issue with naming conflicts between package components. A namespace prefix distinguishes your package and its contents from other developers' packages. Namespace prefixes prevent conflicts between components on the state or query parameter name. Query parameters and `pageReference.state` properties must have namespace prefixes. If they don't have namespace prefixes, the critical update removes them from the org's URLs. This critical update is automatically enabled in Summer '19 on May 17, 2019.

Open Hyperlinks in Formula Fields Correctly

This critical update addresses an issue opening hyperlinks in formula fields. If you have formula fields that contain a `HYPERLINK` function, Lightning Experience currently ignores the target value when attempting to open the link. This critical update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This critical update is automatically enabled in Summer '19 on May 17, 2019.

Improve Security for Sites and Communities by Restricting Record Access for Guest Users

To address potential security vulnerabilities, we applied a critical update to Salesforce sites and communities on October 5, 2018. This update removed default record access for guest users so that they can no longer create, read, update, or delete Salesforce records. You can give guest users access to your Salesforce records by editing your object permissions.

Improve Email Security with Redesigned DKIM Keys

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to mess around with public and private keys. Instead, Salesforce publishes the TXT record containing your public key to DNS. We also added automatic key rotation to reduce the risk of your keys becoming compromised by a third party. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys.

Retired Critical Updates

The "Enable Stricter Content Security Policy for Lightning Components" critical update has been replaced by an org setting. For more information, see [Stricter Content Security Policy \(CSP\) Changed from a Critical Update to an Org Setting](#).

Help and Training

We added Trailhead trails, modules, and projects, and instructional videos. We also added a new implementation guide for Salesforce Engage and updated our Trust and Compliance documentation.

IN THIS SECTION:

[Explore Features with Trailhead](#)

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. 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.

[Introducing the Salesforce Engage Implementation Guide](#)

With Salesforce Engage, marketing can share content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.

Explore Features with Trailhead

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. 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 trails, modules, and projects.

New Trails

[Campaign Basics](#)

Learn how to get the most out of Salesforce Campaigns to maximize your marketing effectiveness.

Customize Your Community

Learn how to optimize and personalize your community with high-impact customizations.

New Modules

AppExchange Checkout

Learn how Checkout helps you manage online payments and monitor sales for your solutions.

Health Cloud for Payers

Learn how to deliver fantastic member experiences with Health Cloud for Payers.

Lightning Knowledge Basics

Learn how to use Lightning Knowledge to create a knowledge base for better customer service.

Financial Services Cloud Release Readiness

Learn about the Salesforce release cycle and how to prepare your org for a new release.

Service Cloud Agent Productivity

Learn how to help your agents work faster and more efficiently in the Service Console.

Web Chat Basics

Learn how to set up a simple-to-use web chat channel using Snap-ins Chat in Lightning Experience.

Analytics App Design

Learn the principles of app design and how to use them to build beautiful Analytics apps.

Lightning Dialer

Learn how Lightning Dialer can make sales teams more efficient and productive.

Advanced Territory Management

Learn advanced skills for managing territories, including performance considerations.

New Projects

Build an Einstein Bot

Learn how to build an Einstein Bot that can help customers with simple questions.

Share CRM Data with Your Partners

Learn how to use Salesforce settings to share CRM data securely with partners.

Personalize the Community Experience with Audience Targeting

Build a customer account portal that's personalized for different audiences.

Quick Start: Einstein Analytics

Get to know Einstein Analytics by building and sharing a data exploration app.

Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new  [Who Sees What in Communities](#) series shows how to share data securely with external users, through portals and communities.

- The new [Connecting to Salesforce in Gmail](#) video provides an overview of the features available in Lightning for Gmail and Inbox Beta for Gmail. The features include adding records, managing tasks, logging email, and the productivity features available in Inbox Beta for Gmail.
- We updated the [Forecast Accurately with Collaborative Forecasts in Lightning Experience](#) video to include new features such as territory forecasts, forecast sharing, and breadcrumbs.
- The [Get to Know the Einstein Analytics Dashboard Widgets](#) video was updated to reflect enhancements and new features.
- The [Use Steps to Build Analytics Dashboard Widgets](#) video was updated to reflect enhancements and new features.
- The [Get Quick Answers from Your Data with Conversational Exploration](#) video was updated to reflect enhancements and new features.

Review Trust and Compliance Documentation

We made seasonal updates to the Salesforce Trust and Compliance Documents.

Infrastructure and Sub-Processors

These 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, Einstein Discovery, Work.com, Financial Services Cloud, Health Cloud, Salesforce CPQ and Salesforce Billing

- **Services Covered:** Updated to include Einstein Discovery for Customers provisioned on or after October 16.
- **Customer Data Processing:** Updated information
- **Content Delivery Networks:** Added details for Communities CDN feature.

B2B Commerce

- Updated to reflect new B2B Commerce branding
- **Customer Data Processing:** Added additional location information for sub-processors
- **Content Delivery Networks:** Added CDN for Community Cloud feature

Commerce Cloud

- **Customer Data Processing:** Updated information to include mailing address for salesforce.com, inc.
- **Content Delivery Networks:** Updated to reflect description of CloudFront uses

Data.com

- **Customer Data Processing:** Updated information

Einstein Discovery Classic

- **Services Covered:** Updated to reflect infrastructure change for new Customers on or after October 16, 2018

“Einstein” (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Services Covered:** Updated to reflect new Einstein Analytics Plus and Einstein Prediction Services
- **Customer Data Processing:** Updated information

Heroku

- **Customer Data Processing:** Updated information
- Updated to use defined terms consistently

Desk.com, Einstein Discovery, LiveMessage, Quip, and SalesforceIQ CRM Services

- **Customer Data Processing:** Updated information

IoT Cloud

- **Customer Data Processing:** Updated information

Marketing Cloud

- **Scope:** Updated to include Interaction Studio. Updated to reflect branding changes.
- **Customer Data Processing:** Updated information to include mailing address for salesforce.com, inc. Updated to remove Data Intensity, LLC as a sub-processor and to add Heroku, Inc. as a sub-processor for Interaction Studio.

Pardot

- **Customer Data Processing:** Updated information

Salesforce DMP

- **Infrastructure - Customer Data Storage:** Updates to reflect branding changes.
- **Customer Data Processing:** Revised list of non-storage processors of Customer Data (1) to include mailing address for salesforce.com, inc., and (2) to list Amazon Web Services, Inc.
- **Content Delivery Networks:** Added section defining Content Delivery Networks (CDNs) and listing current CDN Fastly, Inc.

Notices and Licenses

These changes have been made in the **Notices and Licenses Documentation**.

Salesforce

- **Services Covered:** Updated scope of Services Covered.
- **Service Cloud Snap-ins for Mobile:** This section was added to provide information on third party functionality and terms.
- **Account Intelligence:** Account Intelligence feature no longer subject to the Twitter terms of service.

B2B Commerce:

- Updated to reflect new B2B Commerce branding

Einstein Analytics

- **Services Covered:** Updated scope of Services Covered.

Einstein Discovery Classic

- **Services Covered:** Updated scope of Services Covered.

“Einstein” (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Services Covered:** Updated scope of Services Covered.
- **Inbox:** Added Google Places API as Non-SFDC Application
- **Inbox:** Updated language on Gmail and Microsoft Outlook/Exchange as Non-SFDC Applications

Heroku

- **Quota & Limits:** This section was added to provide information on hard/soft limits and the use of login credentials.

Marketing Cloud

- **Services Covered:** Updated to reflect branding changes.
- **Advertising Studio:** Updated to reflect third party terms associated with use of Onboarding Partners.
- **Interaction Studio:** Updated to reflect terms associated with Interaction Studio.

- **Social Studio - Third Party Notices:** Terms Applicable to Public Sector Use: Updated to reflect new Pass Through Terms from Twitter.

Pardot

- **Third Party Notices:** Updated to reflect third party terms associated with use of Citrix GoToMeeting/GoToWebinar services.

Salesforce DMP

- **Use of Third-Party Data:** Clarified the scope of the prohibition on a customer's export of Third-Party Data from the Salesforce DMP Services.

Security, Privacy, and Architecture

These 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

- **Services Covered:** Updated scope of Services Covered.
- **Audits and Certifications:** Removed exceptions for IOT Explorer.

B2B Commerce:

- Updated to reflect new B2B Commerce branding
- Audits & Certifications: Removed reference to TLS 1.1 requirement

Commerce Cloud

- **Security Controls:** Updated to reflect additional controls
- **Physical Security:** Updated to clarify access controls systems
- **Return of Customer Data:** Updated to clarify the return of customer data for environments with different Order End Dates
- **Deletion of Customer Data:** Clarified that certain data is retained for Analytics purposes
- **Analytics:** Clarified how certain Customer Data and Customer website data is used

Einstein Discovery Classic

- **Services Covered:** Updated to reflect infrastructure change for new Customers on or after October 16, 2018

“Einstein” (Sales Cloud Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language Services, and Einstein Bots)

- **Services Covered:** Updated to reflect new Einstein Analytics Plus and Einstein Prediction Services
- **Analytics:** Added language regarding the use of aggregated information that does not identify customers or individuals.

Heroku

- **Audits and Certifications:** Added information on ISO 27001/27017/27018 certification and Service Organization Control report. Updated to clarify the applicability of the Payment Card Industry Data Security Standard.
- **Quota & Limits:** This section was added to provide information on hard/soft limits and the use of login credentials.

Desk.com, Einstein Discovery, LiveMessage, Quip, and SalesforceIQ CRM Services

- **Services Covered:** Updated scope of Services Covered.

Marketing Cloud

- **Services Covered:** Added information related to Interaction Studio. Updated to reflect branding changes.
- **Third Party Functionality:** Removed processing by AWS for publicly available content for Social Studio.
- **Audits and Certifications:** Added EU-US Privacy Shield certification.

- **Security Controls:** Updated security controls.
- **Security Policies and Procedures:** Updated to clarify data maintained for log entries.
- **Physical Security:** Updated to clarify security available in marketing cloud data centers
- **Deletion of Customer Data:** Updated to clarify deletion process for Social Studio.

Salesforce DMP

- **Audits and Certifications:** Updated to specify request process for SOC 2 reports.
- **Third-Party Functionality:** Revised Third-Party Functionality section to state scope of third-party providers' activities.
- **Return of Customer Data:** For clarity, revised to state that the data available for export is subject to the customer's lookback window in the associated Order Form.

Deletion of Customer Data: Revised Deletion of Customer Data section to state that the total deletion timeline is 90 days from deprovisioning.

Introducing the Salesforce Engage Implementation Guide

With Salesforce Engage, marketing can share content with sales to boost your company's selling power. Sales reps can use marketing-approved email templates to contact prospects at the right moment and track the effectiveness of the messages in Salesforce.

Check out the new [Salesforce Engage Implementation Guide](#), which walks you through setting up and provisioning Salesforce Engage to your users.

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.