nextview...

The design and tech firm.

Release Paper

SALESFORCE SUMMER 19 RELEASE

salesforce platinum consulting partner

Contents

INTRO

Huub Waterval
CEO Nextview

Dear Trailblazer,

Before you lies the very first Release Paper from Nextview. Issue number one!

As Nextview we are celebrating our 10th anniversary this year. We have been active in the Salesforce world since our start in 2009, which makes us already one of the dinosaurs in the market place given the speed at which the partner landscape is developing. However, unlike the dinosaurs we have been able to stay agile, experiment and to pivot. These pivots have over the years proved to be essential to arrive where we are now. A leading Design Thinking & Salesforce Consulting Firm in The Netherlands, ready for the next decade!

Leading does not only mean the highest number of certified consultants or individual certifications. For us, knowledge and experience are more sophisticated ways of leading, which come with the responsibilities such as investing in the talents of our consultants and the development of new competences and by keeping you updated on the latest developments. This way you, as a true trailblazer, can create more value for your organisation and grow with us along the way.

This year Nextview has dedicated all focus to Salesforce & Design Thinking. We have invested in the setup of an industry team to strengthen our knowledge and leverage our experience in (1) Financial Services, (2) Professional Services & Utilities and (3) Manufacturing, High Tech and Consumer Products and Goods. We have also selected four areas of strategic competencies to guide the investments and development of our people being (1) Field Service Lighting, (2) Data & Analytics, (3) Mulesoft and (4) B2B Commerce.

With the largest number of Field Service Lighting implementations in Europe we have already become leading in the field, but given the demand, this is an area where we are doubling down on, resulting in cross-training the majority of our consultants in FSL and B2B Commerce (CloudCraze).

Those who khave known Nextview for a long time, will remember our track record around AI & Data Visualisation. We already had a great team around this topic and it makes me proud to announce that they will become the first Master Navigator in NL (and even Europe) this year. Also with the acquisition of Tableau, we could not have been happier.

Since the Salesforce acquisition of Mulesoft we have made great progress as well, not only have we leveraged our SAP integration knowledge and experience towards Mulesfoft, but we have also signed the very first Mulesoft Partnership as a Salesforce Partner. Our team is fully certified and ready help you with your integration and API challenges!

So, a long story short, if you want to know what to start with tomorrow, read further and learn what we think is important to know about the Salesforce Summer 19 Release!

And don't forget, this is the first issue - keep it, it will be a collectors item.

Best regards,

Huub

SALES CLOUD

Use Einstein's powers to monitor Pardot prospect engagement in Salesforce

Quip for Sales

Wouldn't it be great if you can finally monitor your account plan progress, share it with a lot of other people (maybe even the customer itself) and don't have to use a custom object to get close to this?

Quip is your tool! Not only for account plans of course, Quip will deliver an amazing way of sharing information, co-creation and maintaining flexibility. Best thing? It's now fully integrated in Salesforce. So you can directly access the Quip document or have a template setup within each Salesforce record!

Even collaboration with partners is so much easier this way. You can share your data, without having to give your partners full Salesforce access. Needless to say Salesforce is aiming to make Quip the main collaboration tool out there, and with having it fully integrated on record level, the ease of use for your own Salesforce users is great!
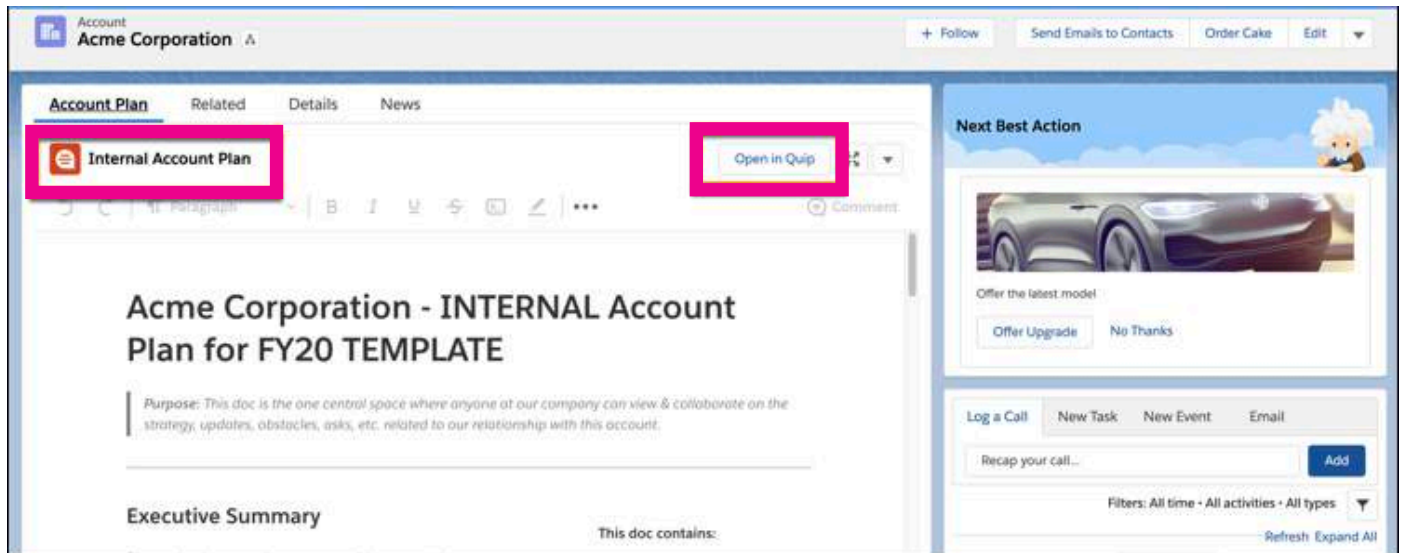

Access Quip documents directly from Salesforce

Monitor prospect engagement with Pardot

Loved the Pardot Engagement component as much as we do? Then there's good news for you! Now you can actively monitor your Pardot Campaign in Salesforce, reviewed by the legendary Einstein.

He will tell you where you are doing great, but also where you could improve your campaign! No longer only for List emails, but now also for your whole marketing journey.

This way Einstein will enable you to be more successful in your marketing efforts, without your company having to put too much of an effort in it yourself. This will allow your marketing department to focus on what's really needed; getting the right content on the right location at the right time.
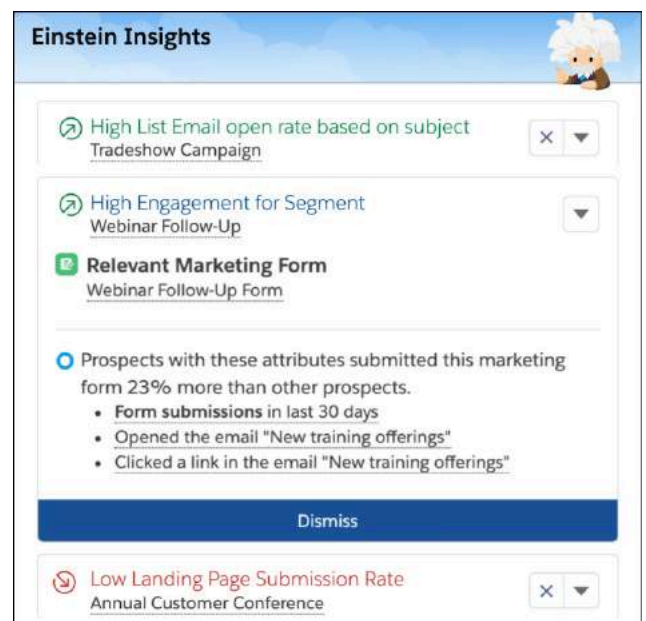
Einstein insights for Pardot prospects

"Having used Quip for quite some time now within Nextview, the latest functionalities definitely help us in using Quip even more efficiently. Being able to go directly to all the record related and relevant content will improve adoption and help collaboration to the next level again."

**Dico Timmerman, Delivery Director and fanatic Quip user**

SALESFORCE PLATFORM

See more with the "Full View" option.

View Records Using Full View

If your users have a strong history in Classic, it can take some time getting used to the Lightning environment after a transition. The Display Density Settings released in Winter'19 already gave users the option to use the Compact Display setting which has a more classic feel to it.

For the users not liking the related list on the right, and who want to have a full record page view, Summer '19 now allows you to use the Full View (1) option which gives this more classic feel. Alternatively, users can choose the Grouped view (2).
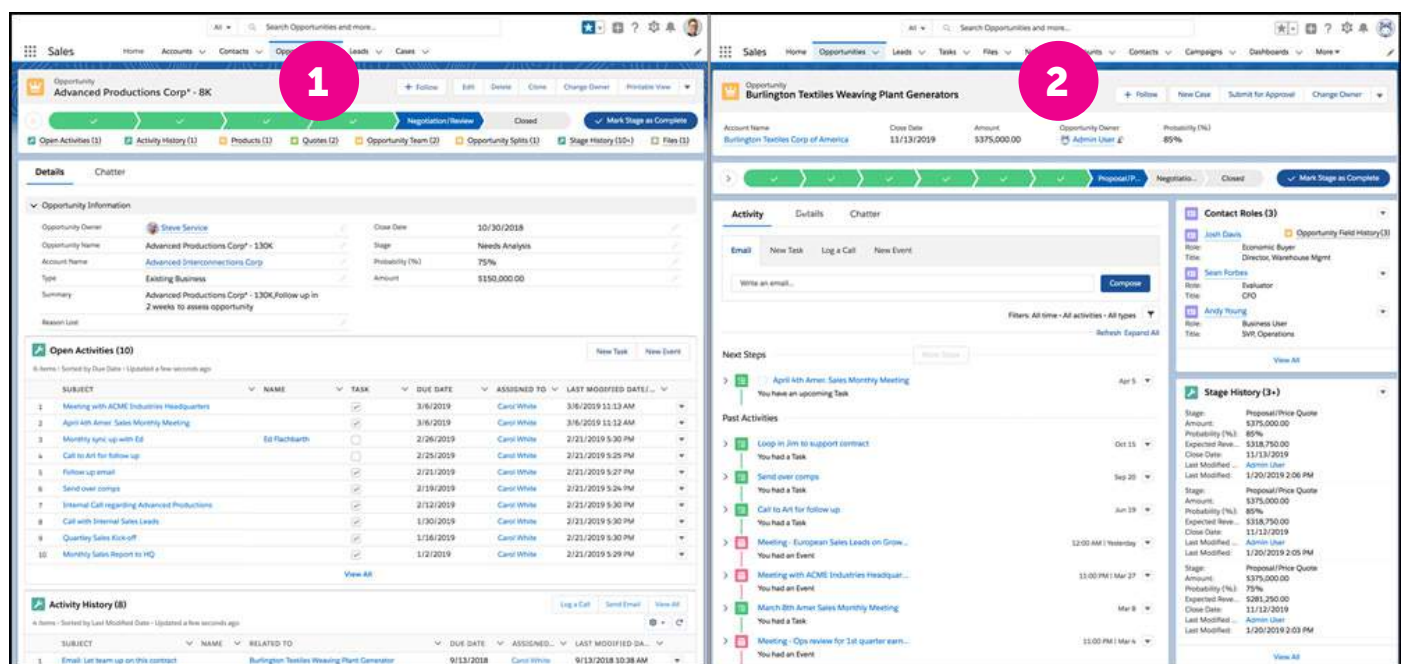
The Full View option and the Grouped View

"This feature will help our Salesforce Classic user base transition more easily to Lightning. Delivering a similar UI as people were used to in Salesforce Classic will make it easier getting used to Lightning as a Salesforce Classic user."

Michael Hardenbol, Senior Technical Architect

A new way of informing users with Notification Builder

With the introduction of Notification Builder you are able to send notifications when important events occur. For example, whenever an Opportunity is Closed/Won with an amount above € 500.000,00, you can send a push notification directly to the Sales Director or Sales team.

You have the option to choose 2 output channels: the Salesforce mobile app or the Bell Icon in the Desktop experience. Or use both output channels at the same time.

This way you no longer have to use the Chatter feed for trigger notifications to your users. The new notification builder will allow you to send out notifications in a more granular way, targeting the correct audience.
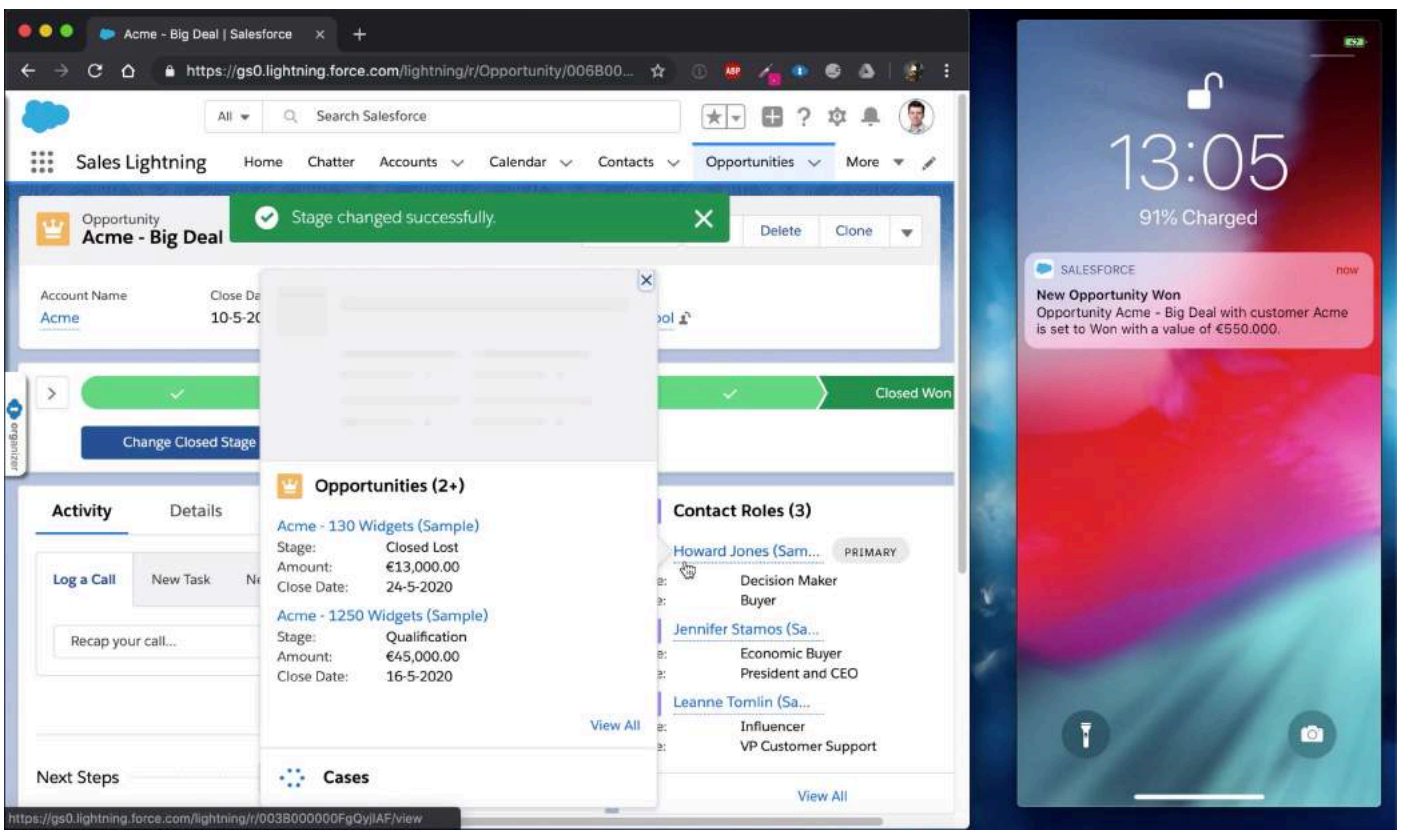
A notification example on a mobile phone

"Notification builder delivered with Summer '19 gives us the ability to deliver notifications to Salesforce Mobile users just like any other app on your phone, allowing for a user friendly and familiar experience for Salesforce Mobile users. I expect a lot of interest from our customers to implement these notifications next to the existing chatter feed notifications."

Nico Verhagen, Practice Manager Salesforce Platform

SALESFORCE EINSTEIN

Einstein is everywhere this summer!

This year, Salesforce Einstein is similar to feeding beetroot to a baby, it is all over the place! And we are smiling because of it. With years of experience in Data, Business Intelligence and Analytics, it is refreshing to see Salesforce approaching the topic not as a separate island of IT and Data departments, but embedding it across all Salesforce products, as close as possible to the business process and users. Let's look into four themes which caught our attention!

Enabling Trust

Perhaps one of the key reasons why companies are struggling to adopt Data and Analytics, is a matter of Trust. On one side we see business users asking questions like "Are you sure the data is correct?", "Did it take reason X into account?" and "How accurate is the prediction?". On the other side we see increased attention in society to address diversity, inclusion and ethics in our Data and in AI. To help out, Salesforce is releasing two key features this summer: Bias Protection and Enhanced model metrics.

When your Data Scientist is building models in Discovery, Einstein will provide a notification when important data for the model may be biased and will allow the user to easily exclude ("protect") it from your model.
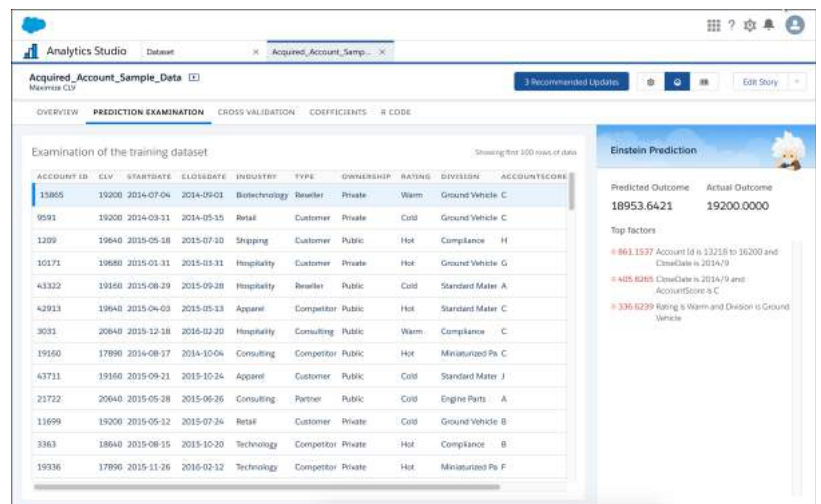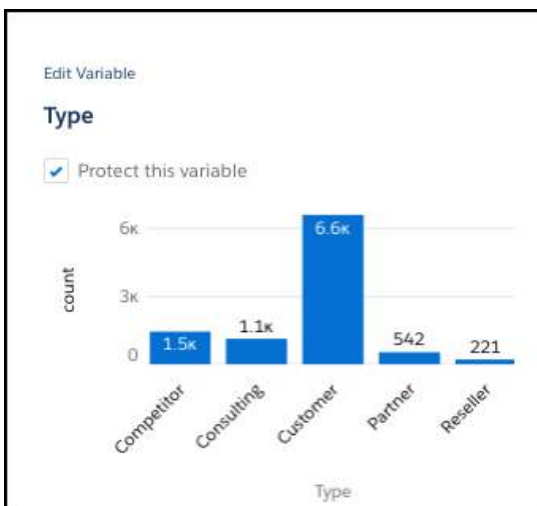
Protect (exclude) variables and examine the prediction dataset

"Trust is key in any data product, whether it is a report or an algorithm. No matter how valuable your data product may be, Trust will determine the adoption and usage of your data product. And without usage, no success."

Luuk Martens, Practice Manager Analytics & AI

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"With these new Einstein Discovery features, Artificial Intelligence becomes more and more accessible for the mass. The unique combination of low code AI, rapid prototyping and the simplicity of applying it to core business processes can help your business become more data driven in an eye wink!"

Jip Koning, Analytics & AI Consultant

Embedding Analytics

Bringing the data and insights to the fingertips of your users is key to becoming a data-driven organisation. Salesforce already provided several "unofficial" components which required some minor coding and integration to get Einstein insights to your page-layouts. As of the Summer '19 release, Salesforce is rolling out several official standard integrations of which we want to highlight 3:

• Display Einstein Discovery Predictions in Lightning Experience Record Pages
• Get Code-Free Predictions on Salesforce Records (Pilot)
• Put Einstein Next Best Action Recommendations at Your Agents' Fingertips

It is now possible to add Einstein Predictions with drag-and-drop functionality to a standard Lightning page and although in Pilot, the writeback procedure for Einstein Prediction scores and models don't require a managed package anymore. The final and perhaps most interesting feature in this set is the integration of a standard integration for the Next Best Action flow-builder. First of all NBA was improved with enhance and generate bulk recommendations, and secondly a standard action to include your Einstein model will now allow you make your recommended actions even smarter!

*Make recommended actions even smarter with Einstein Predictions*

Small to Big Data

Perhaps one of the main concerns when thinking of implementing Artificial Intelligence and Big Data is the question of "Do we have enough data?". We are seeing the following signs Salesforce is addressing this exact question and expect them to take it even further in the next release.

• Gain Insights from Smaller Einstein Analytics Datasets
• Sales Cloud Einstein: Get Ready for Global Models

The first sign is great for organisations who recently implemented one of the Salesforce clouds. There is no need to wait until you have years of data in your system, the basic discovery stories already start displaying insights based on a dataset of only 50 examples (rows), while the more advanced predictions now will only require a minimum of 400 examples.

The second sign is a bit more fundamental to the Sales platform. And although it is not a feature we currently see active anywhere, it hints on what's to come. Rather than training your model only on your data, Salesforce is seemingly looking at global use cases which could be trained on data coming from multiple orgs and perhaps many different companies working together. This way you would be able to leverage pre-trained algorithms based on anonymized global Salesforce data (imagine how much data could be in there!). We are expecting to see more communications about these Global Models moving closer to Dreamforce 2019.
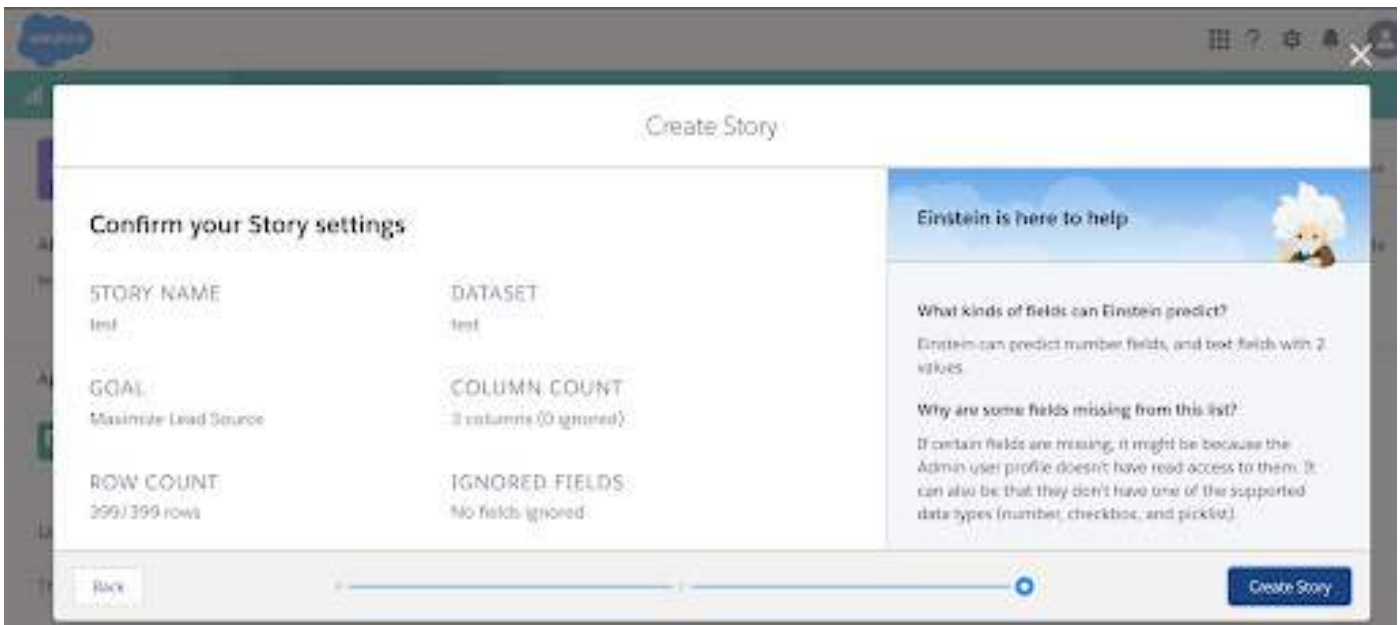
Display insights with Discovery Stories

"Driven by impressive newsworthy examples of Artificial Intelligence, many organisations think Data, Analytics and AI is something for PHD Data scientists or far in the future on their roadmap, but with Salesforce, every organisation is ready to start."

Luuk Martens, Practice Manager Analytics & AI

Einstein for Freemium

As stated before, Einstein is everywhere this summer! Besides use-cases in the Sales & Service cloud we also start seeing more of him in Pardot and Platform. The release notes are full of various minor and medior improvements to these applied AI cases (improved Bot-to-Agent handover, improved forecasting and Campaign Insights), but what grabbed our attention was actually something not mentioned in the Release notes!

Looking at the latest Einstein Cheat-sheet, we are seeing several of those cases being introduced as a freemium within your current license, making the threshold to apply the basics of AI even lower! Examples are the Einstein Activity Capture in Sales Cloud and the Einstein Next Best Action in Service Cloud. This will allow you to quickly test and see how the power of those applied AI use cases can benefit your organisation.

"With these new Einstein Discovery features, Artificial Intelligence becomes more and more accessible for the mass. The unique combination of low code AI, rapid prototyping and the simplicity of applying it to core business processes can help your business become more data driven in an eye wink!"

Jip Koning, Analytics & AI Consultant

SERVICE CLOUD

Add some confetti to your org to celebrate a status change!

More productivity on the road with the updated Field Service Lightning app

As one of the most experienced teams in enabling Field Workers through Field Service Lightning we are particularly excited about the improvements that the Summer '19 release will bring to the Field Service Lightning iOS and Android apps. For example, the FSL app now supports deep linking, allowing you to send your users to specific screens in the FSL app on their smartphone. This is very convenient whenever your users interact with multiple applications while servicing your customers. In case your users would use another application for invoicing, they could be sent right back into the correct screen in the FSL app after finalising.

Another great addition is the option to modify the moment when the field worker receives a notification of a Service Appointment being assigned to them. You can now choose to send these notifications when the appointment is assigned or dispatched. And finally, in the past, Android users were unable of viewing related files in the FSL app. With the Summer '19 release this issue is resolved.

▼ Customization			
Default List View Developer Name		Send appointment notifications on assignment	✓
Future Days in the Date Picker	45	Send appointment notifications on dispatch	☐
Past Days in the Date Picker	45		

Choose when sending notifications of Service Appointments

Meet Chat and Messaging

Salesforce has been growing their offering in engagement tools for Service Cloud over the last few years, adding great channels like Live Agent, LiveMessage, Social Customer Service and more. For us here at Nextview, the difference between Live Agent and LiveMessage was always a bit difficult to explain - since their names are quite similar. Well, meet Chat and Messaging!

Chat is the new name for Live Agent, the tool that allows for customer to start an inbound chat conversation with you. In the Summer '19 release there will be several improvements in chat conferencing, like a clear indicator you can't see certain chat conversations due to permissions and automatically showing older comments when an agent joins the conversation.

Messaging on the other hand is the new name for Live Message, Salesforce's tool to follow up with your customers by sending outbound messages over channels like SMS, Apple Business Chat and Facebook Messenger. With the Summer '19 release, WeChat will be piloted as a new channel. Another valuable addition is Sensitive Data Rules, a functionality that will automatically hide sensitive data shared in chats.

"I'm personally very happy that the Summer '19 release will allow Android users to view related files without switching back to the Salesforce app. This will really help productivity on the road"

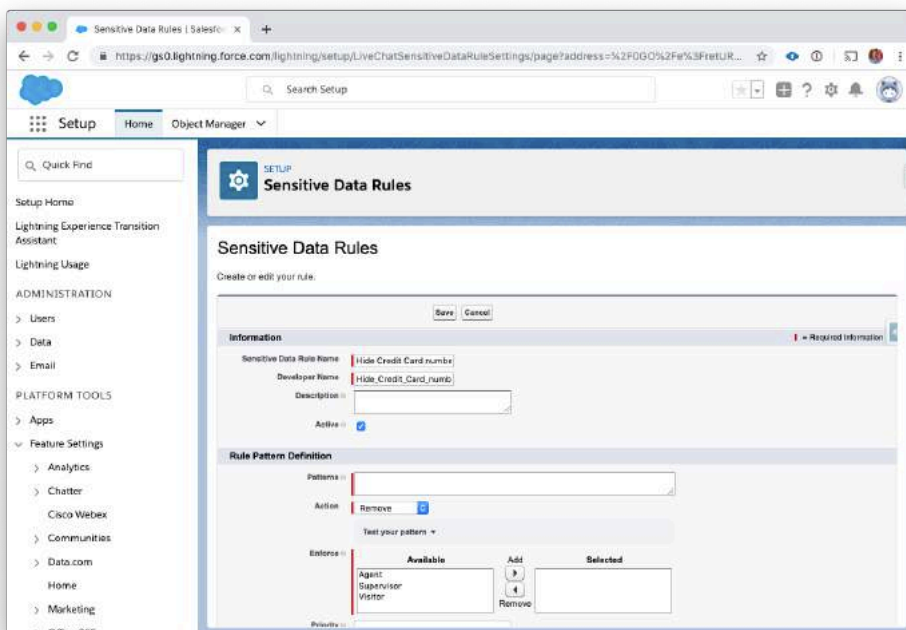**Patrick Gaspersz, Senior Consultant & Field Service Lightning expert**

Confetti in your Org

This functionality is simple but effective, a gimmick really.

It allows a nice celebration on your screen when updating any record's status to a status worth celebrating, like closing a case!
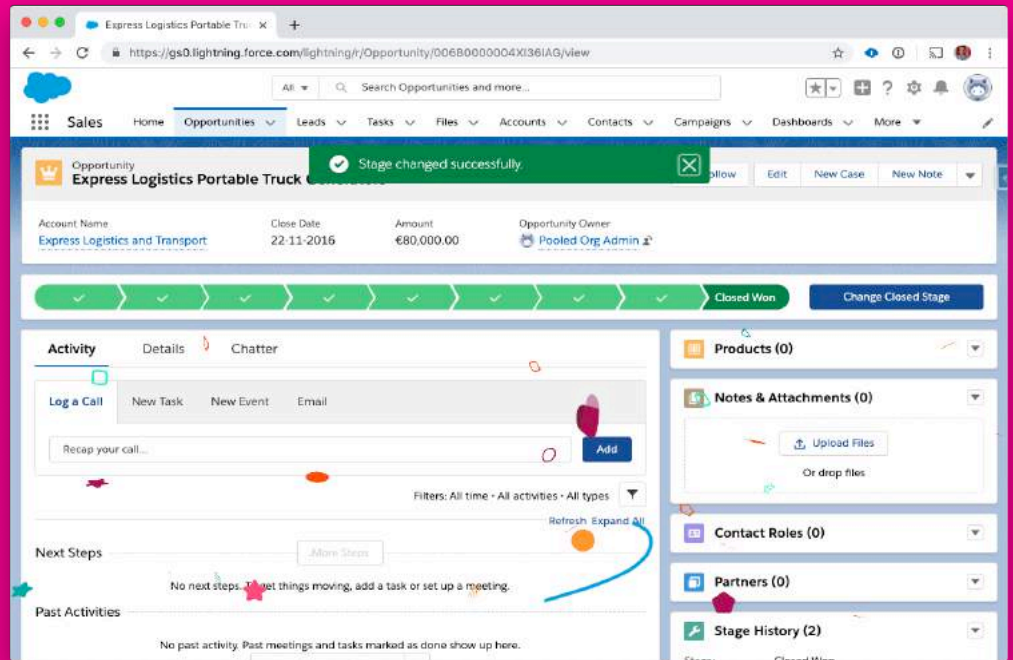
Celebrate with Confetti!

Hide sensitive data in chats with Sensitive Data Rules

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