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The design and tech firm.

Release Paper

SALESFORCE WINTER '21 RELEASE

salesforce platinum consulting partner

Contents

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- Salesforce Einstein for Service
- Human-Centric Service
- Get ready for Servitization
- The future of Field Service Management
- How to use Data & AI to grow your business
- Financial Services Cloud
- Connected Sales & Operations for Manufacturing


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INTRO

Huub Waterval
CEO Nextview

Dear Trailblazer,

Autumn has started and Winter '21 is around the corner! What a year 2020 has been. A year of new challenges and new opportunities for Nextview. We have been working hard for our business during these challenging times and we are proud to say that we have adapted ourselves pretty well to the new normal.

We have mastered how to work best remotely in a team for our clients and have helped them to navigate through these challenging times. Our collaboration with Gartner and Salesforce has delivered many interesting monthly live online-events and we will keep on doing this on a monthly basis. If you have missed them, please check our website to watch our webinars and workshops on demand!

On top of that, we have kept ourselves busy with training to stay up-to-date with all the newest products of Salesforce. We have spent a lot of hours in virtual classrooms and are more motivated than ever to keep learning. Early this September, we as a company even surpassed the milestone of 10.000 badges on trailhead! We make learning a priority in order to acquire all necessary knowledge to remain your number 1 independent Salesforce partner in the Netherlands and Germany. By doing this, we can help your business grow and achieve its objectives better and faster than ever before. Also please watch out for an upcoming press release with some interesting news around Salesforce Einstein!

As a result, we look to grow faster than the market this year, which is extraordinary. We are growing in both the Netherlands and Germany and this is also reflected with our many new hires this year. Our business is growing with talent and expertise from places all over the world. To "Work as friends", also now implies to work with the best!

The Winter '21 release paper will kick-off with Sales Cloud where Niek Bachman highlights new possibilities for appointment scheduling, touches upon the improved mobile forecasting function and explains how to interactively create engaging email templates.

The Salesforce platform and mulesoft team also look to showcase their new features in the Winter '21 release paper. Our platform expert Nico Verhagen will touch upon new topics such as dynamic forms and actions, lightening page performance analysis, the flow builder and more. Our mulesoft expert Sjoerd Santegoets will introduce the new, exciting and upcoming features of Mulesoft.

The Data & Analytics team will touch upon new features in Salesforce Tableau CRM as well as briefly discuss our partnership with Snowflake and Tableau as these become more connected with a variety of data sources.

Our Financial Services Cloud experts, Nicolaij Klepe and Ewa de Vries will touch upon 3 new exciting features including, compliant data sharing, improved UI & UX for financial services client portal community and enhancement in policy components.

What's new in the Winter '21 for Manufacturing Cloud? Intriguing new material! Don't wait and read about the extended core functionality for Sales Agreements and Account Based Forecasting, which is made more flexible through configuration options.

On top of that, our Service Cloud and Field Service Lightning team discuss how Einstein for service gets smarter once again and their support for eight additional languages which are added in the pilot! How exciting!

Last but not least, our Marketing cloud team will touch upon the newest marketing enhancements.

I hope you will enjoy reading our fifth Release Paper. We are more than happy to help improve your business. Feel free to contact us for a virtual cup of coffee or even for a first remote digital engagement.

Happy trailblazing,

Huub

SALES CLOUD

Our top new features in Sales Cloud Winter ‘21

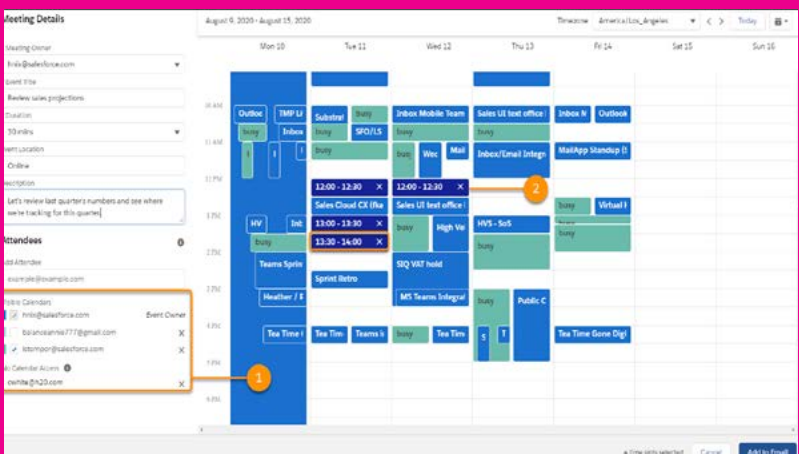
The new way of appointment scheduling!

Trying to find a date for a meeting being in email communications ends up most times in sentences like ‘Let me know when you have time and I will try to schedule an appointment’ or ‘I can offer you the following time slots,....’. It is unproductive and once offered they can be blocked otherwise fast so your availability is not longer up to date.

Salesforce has now released a solution for sales reps users, that improves your customer’s (or clients’s) experience you are searching for an appointment to meet with them and also will save time and the risk of misunderstandings in this process.

When using salesforce inbox you find the functionality in the new icon button ‘Insert Available Times’ at the bottom of the email composer.

Sales Reps can now search and select time slots in their and also other users’ calendar (1) and add these slots to the calendar and email they send to their contact (2). The recipient then just selects the slot that fits most to their schedule and confines it. That’s it! If slots are blocked otherwise they will disappear from the suggested list and no double booking will cause trouble (to be verified).

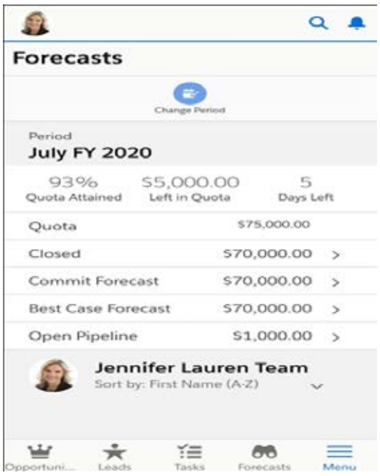


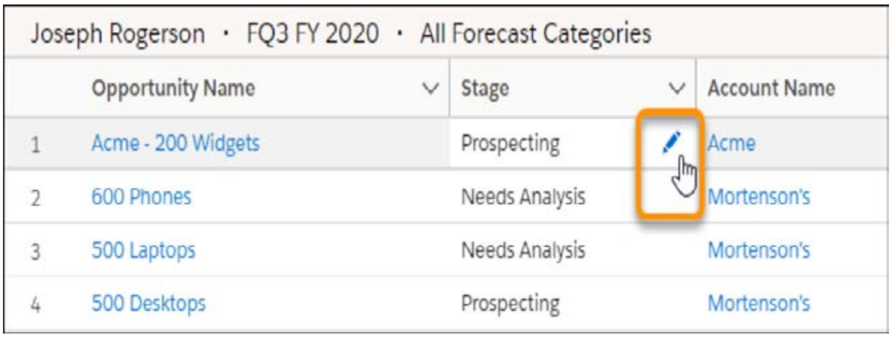
Lightning Experience orgs with Salesforce Inbox and Enhanced Email enabled in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions and users with ‘Use Inbox user permission’, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license will be able to use that function once Winter ‘21 release is available on their Org.

Improved mobile forecasting function

With Winter ‘21 release, mobile forecasting is no longer limited to iOS devices. About 80% of the mobile devices worldwide are operating on Android software. Considering this number Salesforce has now enabled many new users to check the opportunity forecasting numbers while travelling and using their mobile Android devices. The forecasting when used mobile is a read only feature. When it comes to editing the forecasting details users still need to access them via desktop version.

Talking about the edit function for forecasting, Salesforce released an additional new improvement for forecasting users. You can now work with inline editing for the stage field on the forecast page and no longer need to open each single opportunity. The inline editing was already available for some other fields so with the Winter '21 release it is extended also to the 'Stage' field. Just clicking on the pencil next to the stage field opens the inlined edit mode and you can update the stage for each opportunity in your forecast.

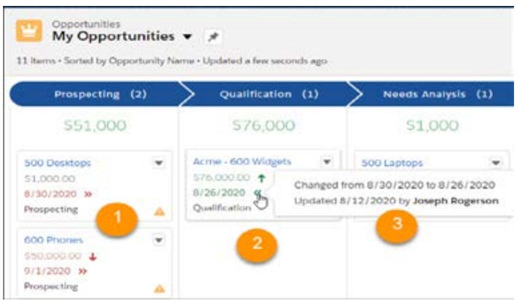


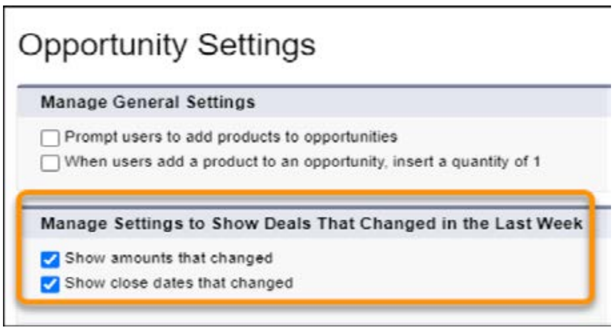


Find Changed Deals at a Glance

In our last Nextview Summer '20 release paper we already highlighted the very appealing Kanban view for Opportunities. It allows user to oversee all Opportunities in a dynamic overview with relevant information like opportunity amount, account name or close date. Listed by stage with an accumulated amount for each stage this is already the preferred overview for many customers. If you are using the Lightning Experience in Unlimited Edition you will now get another new helpful extension to that feature.

Changes to opportunity amounts and close dates now show motion indicators for 7 days. If a user has changed one of them a red text and arrows indicate amounts that decreased and close dates that were pushed out (1) or green text and arrows indicate amounts that increased and close dates that were pulled in (2). Hover over an arrow to see what changed, who changed it, and when (3). This feature is turned off by default, can be activated in the opportunity settings and is available in list view and kanban view.





Having these new indicators you can get even more insights about the healthiness of your opportunity pipeline and see positiv (green text) or negative (red text) trendings of the single opportunities.

Interactively Create Engaging Email Templates

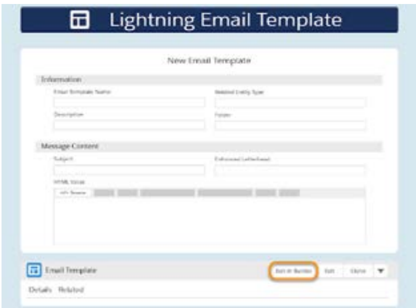
Create email templates faster and more easily with visual tools in Email Template Builder. Instead of adding HTML code, your users can drag elements to create effective email templates. They can compose email templates with a few clicks to place design elements right where they want them.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions, and all editions of Pardot in the Pardot Lightning app. This feature isn't available in Pardot Classic or the standalone Pardot app.

Who: Creating and managing Email Template Builder templates is available to users with the Access Lightning Content Builder or Manage Content Builder permission set. Any user that can send an email can use email template builder templates.

How: Sending professional, appealing emails is essential when communicating with your customers. Using captivating email templates gets you there.

After creating a Lightning email template, users with the correct permission see the Edit in Builder button.



Click **Edit in Builder** to open Email Template Builder.

Choose a component (1) and drag it to the canvas (2). Change the details and style of the component using the properties panel (3).

Your users now can easily create an engaging email template.

Salesforce CPQ and Billing: Product Recommendations, Quote Fields, Asset Lifecycle Management, and Standalone Orders

CPQ is a sales tool for companies to quickly and accurately generate quotes for orders. CPQ applications often work in tandem with CRM platforms, ERP programs, and other business technology, which helps ensure integrated data as well as accuracy. Quotes produced with CPQ software are automated according to a preprogrammed set of rules, ensuring error-free pricing that takes into account quantities, discounts, customizations, optional features of products, multiple revenue types, and incompatibilities.

So what's new in Winter'21?

Salesforce CPQ can now display complementary products when reps are creating a quote, and you can control quote fields dynamically. Salesforce Billing customers can now get insight into what customers have bought, and create standalone orders.

Show complementary products on quotes by using a new product recommendations plugin. Show relevant fields on quotes, depending on the business unit, product, or territory. And sales reps can create add-ons on amendment quotes while avoiding backdated amendments with invalid start dates.

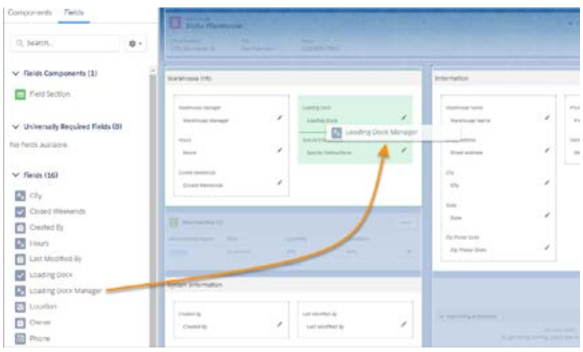
Reps can now get visibility into what customers have bought, using dashboards that show quantity, amount, and monthly recurring revenue throughout an asset's lifecycle. Create orders and order products without ordering them from a CPQ quote. Gather information about financial actions and store it for reporting and ERP integration. And align canceled billing calculations between Salesforce CPQ and Salesforce Billing.

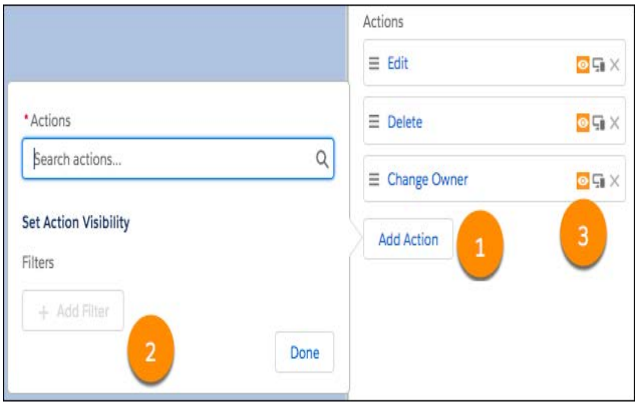
SALESFORCE PLATFORM & MULESOFT

Top new Platform Features in Winter '21.

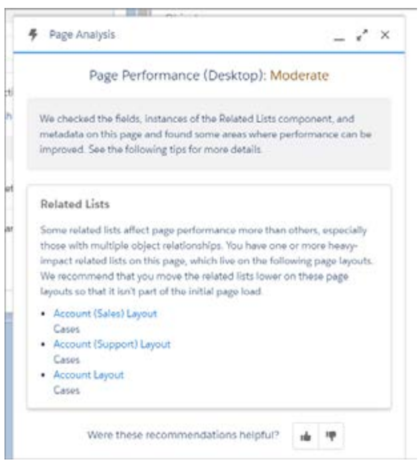
In the Winter '21 Release, there are a lot of helpful changes in the Salesforce Platform that we are looking forward to experiencing! Few of our favourite ones are described below:

1. Dynamic forms and actions: The dynamic forms are now generally available for everyone, giving admins the ability to move fields and field section components in the Lightning Page and create mini page layouts that they can place everywhere within the page. What is more, dynamic actions provide you the ability to assign actions in the Lightning App Builder instead of the Page Layout and set action visibility based on record fields, device types, etc.

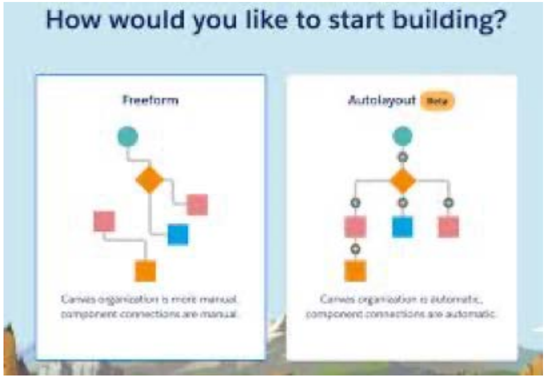




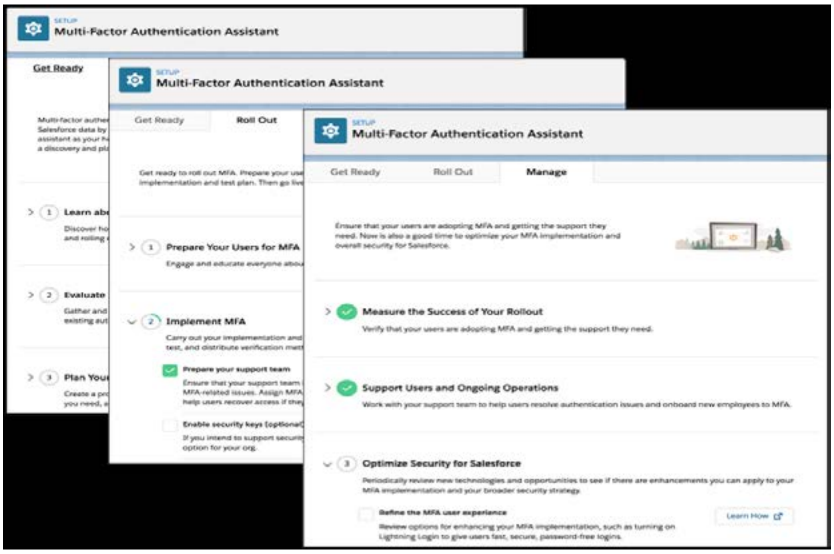
2. Lightning Page Performance Analysis: With this new release feature, developers and admins can take out all the frustration caused by poor page performance, with one click. All they have to do is to click on the Analyze button from the Lightning App Builder toolbar and they can view the assessment of their page's performance.
3. Flow Builder: The Lightning Flow seems to become more and more powerful in every release and provides now more possibilities than ever before. You can now trigger flows to run before a record is deleted without depending on Apex code and debug errors in a Sandbox as another user to catch exceptions based on permissions, sharing, etc. You can also control your automation better by defining entry criteria in Record-Triggered Flows or creating Decision Outcomes that execute when certain Changes are made. Last but not least, you no longer have to go through your flow to locate an error. All you have to do is to simply click on a link and go straight to it!App Builder instead of the Page Layout and set action visibility based on record fields, device types, etc.



4. Visualforce: After the new release update, the instance names from Visualforce and other URLs will be removed, making domains shorter and easier for users to remember. Also, a new attribute “ignoreEditPermissionForRendering” on <apex:inputField> is being introduced, allowing developers to override entity edit permissions for users, even when the underlying permission on the object doesn’t allow edits.



5. Multi-Factor Authentication: The previously known as two-factor authentication is now called multi-factor authentication (MFA) and allows you to add extra protection from potential threats. In addition, a new Multi-Factor Authentication Assistant is available in Salesforce production orgs on a rolling basis between September 18, 2020 and October 17, 2020, to provide you with recommended steps and resources to roll out MFA to your users.
6. Scan a Barcode in a Lightning Web Component (Beta): You can now use the BarcodeScanner API to add barcode scanning to your Lightning web components. When a barcode is successfully scanned, the data that was read from the barcode is returned to the Lightning web component that invoked it. Scanning is performed locally on the mobile device, and doesn’t require a network connection.



Mulesoft Features in Winter ’21

Mulesoft is the Integration and API Platform of Salesforce. Although Mulesoft follows a different release calendar than Salesforce, Mulesoft does regularly release exciting new features.

Connecting Salesforce

Since the takeover of Mulesoft by Salesforce a lot of progress has been made on integration scenarios for the Salesforce solutions. One way in which this shows is by the continuous release of new features in the Salesforce Connector. Recent innovations include support for the most recent API versions, new supported bulk operations, even more possibilities for event-based integration options, and improved logging. This matters as this makes it even more easy to integrate with Salesforce by virtually any means.

Moreover, Mulesoft keeps releasing new accelerators that significantly shorten development cycles. One of the newly released accelerators is the order management integration to Salesforce Commerce Cloud. This includes pre-built integration assets designed to connect product and inventory data from your ERP and PIM directly into Salesforce Commerce Cloud enhancing the overall customer experience in eCommerce scenarios.

Connecting SAP

Mulesoft's SAP integration capabilities have been around for long time. What is different is that recently the SAP connector became officially SAP certified, enabling faster implementations and deployments in SAP solution-based landscape. The certification includes the integration with SAP's latest release S/4HANA.

Connecting the World

The investments in the SAP connector highlights MuleSoft's ambition to continue to provide a market leading connectivity to enable digital transformation with SAP and any other market-leading third-party applications. This is further emphasized by adding lots of new and improved connectors for other applications like AWS, Microsoft, ServiceNow and Liferay. Mulesoft shows that any worries that all investments are aimed at Salesforce integration after the takeover by Salesforce are misplaced. A special mention here for the Braintree connector that unlocks Paypal transactions making it easy to accept payments in mobile apps or websites

Improved Tooling

Besides the connectors the developer tooling is further enhanced as well. Exciting new features include the possibility to collaborate on API specifications with teammates. Not only does this enable collaboration and teamwork, it also further enhances the possibility to have different roles and teams work on design and development of the API throughout the entire lifecycle and in the tool they prefer.

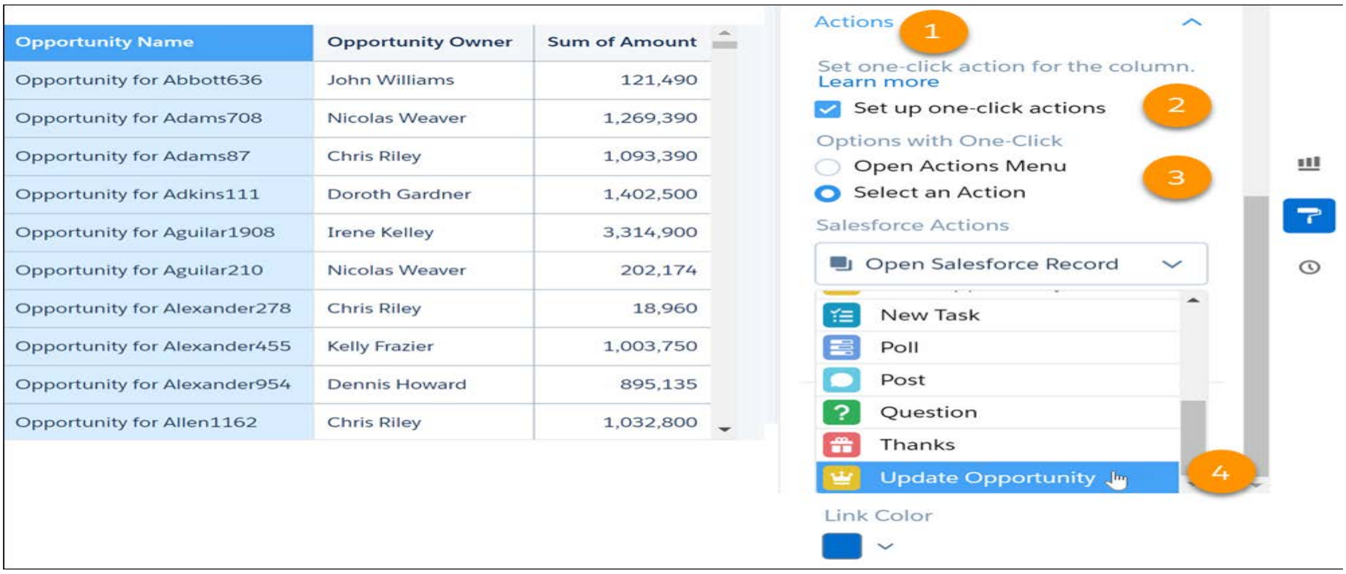
SALESFORCE DATA HUB

Our 5 favorite Tableau CRM trends in Winter ‘21!

We are looking forward to the new Winter 21’ release for Tableau CRM as this update will improve the usability, actionability and customization of Einstein. Salesforce is continuing the strategic trend of moving towards Industry Standards in the Data & Analytics and Business Intelligence space. Next to that, we see Snowflake and Tableau becoming more connected with Salesforce next to a variety of other data sources.

Customizable one-click actions

The time-consuming process of clicking on an account, going to the relevant record and then searching for the new action has been made more efficient by Salesforce. With the new update it has been brought back to a single click directly from the Tableau CRM platform. Actions can be directly employed from the table fields in Lenses and Dashboards. Moreover, the actions that become visible are completely customizable, so you can prioritize the most frequently used actions. This will really speed up working with Tableau CRM.



“This is a very powerful functionality that can significantly improve actionability and user experience. Perform custom actions with a one click - like update opportunity directly from Tableau CRM - is the feature that users were waiting for.”

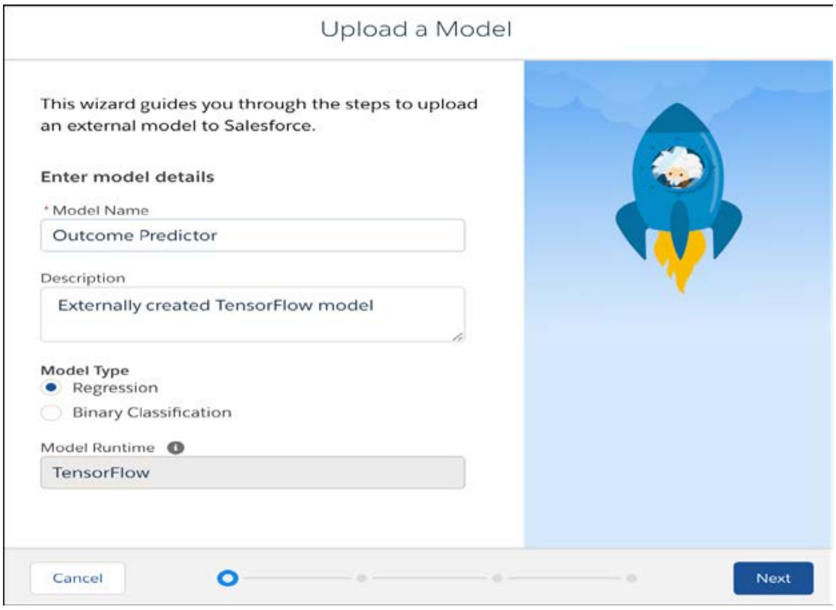
Tatiana Mashliak, Consultant Data & Analytics

Einstein Discovery

Einstein Discovery is a great tool to upgrade your business intelligence and improve your business' performance almost effortlessly. Based on statistical modeling and machine learning, Einstein Discovery identifies and visualises insights found in your business data and is able to support CRM end-users with predictions and suggestions. But what about business challenges that require models which aren't supported yet in Einstein Discovery? Or what about Legacy models or models from other domains that are built and running from other tools?

If your organisation is already working with Data & Analytics for longer, chances are high that developers & data scientists in your organisation already have designed, built and tested statistical modelling in other tools. If your organisation is thinking about getting Tableau CRM & Discovery, there is always this one Data-guy who opposes because the tool doesn't support his favorite but exotic statistical model (or the very popular TenserFlow). Well, good news!

One of the new Salesforce Winter '21 Release features (Beta/Pilot available) in Einstein Discovery allows you to implement a certain type of external model into your Salesforce org. In this feature, your team can use their favourite modeling tools to design, build, test and tune TensorFlow models. In this way, your Salesforce team will be able to provide additional and previously unraveled insights. So dust off those use-cases where Einstein didn't have the right model, and team up with your Analytics partner to innovate! The user-friendly Model Manager wizard guides you through the process. Specify details about the model, variables and outcome your model predicts. Then simply upload the model to your Salesforce org and your users are ready to employ the model's predictions to achieve superior results! We hope this paves the way for more types of external models & tools in future Releases.



N.b. This feature is currently part of a pilot program in Einstein Analytics and is not yet generally available.

"Many data scientists prefer a specific data modelling tool. Now, they will be able to integrate their own prediction models into Einstein Discovery and compare these with the smart models that are already available in Einstein Discovery. The integration of these tailor-made models into the Salesforce platform will lead to more predictive power and subsequently, superior outcomes!"

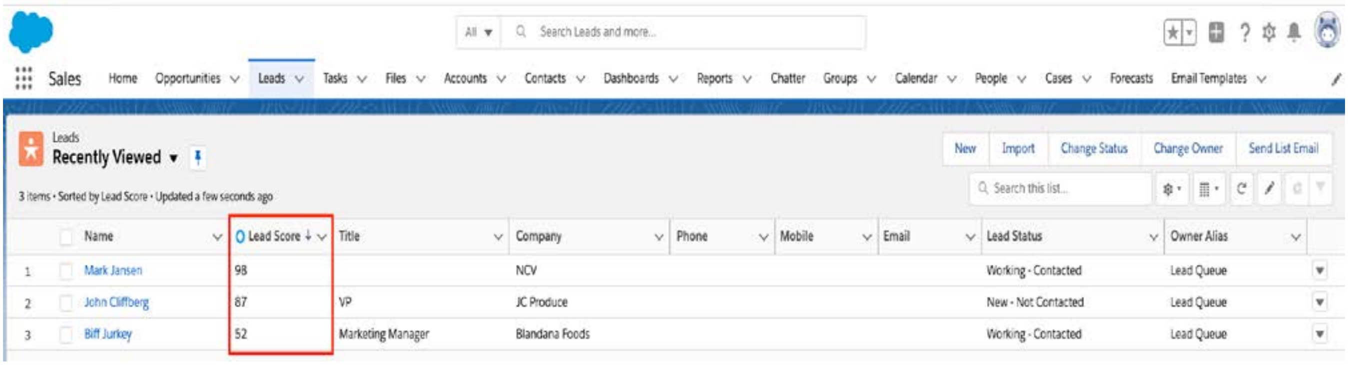
Teun Gilissen, Consultant Data & Analytics

Free Einstein Lead & Opportunity Scoring

Salesforce has made some previously paid features of Einstein available for the whole Salesforce community. Einstein Lead & Opportunity scoring is now available for orgs with and without a Sales Cloud Einstein License. Next to that, they have implemented some minor features to the Einstein Lead and Opportunity Scoring.

Einstein Lead Scoring used to require 1000 new leads and 120 lead conversions to offer lead scoring. Now it uses anonymized aggregated global data to allow orgs without the required data amount to enable Einstein Lead Scoring. When the org has the required data the model will switch from global data to data specific to the org, to allow for more accurate scoring.

In Einstein Opportunity Scoring the scoring model will perform better with accurate data to develop the scoring model. In the new update you can select which opportunities Einstein has to exclude from the data set to increase the accuracy of the scoring model.



"With the release of this update more organizations can use the power of Salesforce Einstein's machine learning capabilities to increase the effectiveness of their Salesforce users!"

Jip Koning - Senior Consultant Data & Analytics

Tableau

Tableau releases four updates per year, we are currently on update 2020.3 so we can expect one more update before the end of the year. These updates are released separately from Salesforce for now but we love seeing that every update Tableau is increasingly becoming more integrated with & in the Salesforce ecosystem.

The huge update on the Tableau relational data model, which we discussed in our previous Release Paper, paved the way for a release with a main theme on the integration of Tableau with Salesforce, but also several cool other external databases and data sources. This is important because Tableau is deployed in a lot of organizations that do not necessarily have Salesforce implemented. Of course Tableau already could integrate with a lot of data, but the integrations are becoming deeper. Notably, and with a hint to our Nextview history in the SAP-space, it is great to see Tableau improved their SAP HANA connector and even offers an official certification for the integration of SAP HANA on Tableau. Changing the Data Model and opening up on integrations also leads to innovations & opportunities of the Tableau "AppExchange" called the "Extension Gallery". Third parties can now include new connectors in the Extension Gallery to facilitate that data transfer between all kind of different data sources, enabling the strong Tableau community to help improve the product.

The last improvement we want to highlight is on Tableau Data Prep. At the core of getting value out of data, is Data Quality. We all know Garbage in = Garbage out. Tableau Prep Builder is a product designed to make the process of preparing your data for analysis simple and intuitive. Data Prep & Engineering is essential to creating fact-based insights and making the right decision. Tableau Prep uses an intuitive visual experience to simplify the process of publishing a dataflow to a database without the use of code or other tools. With the new update Tableau Prep makes it possible to write data directly to an external database. Users can now make the data preparation process more flexible and more integrated with the existing IT infrastructure. Moreover, Tableau Prep could now be used for use cases outside of Data visualization and Dashboarding. It can be used for Data Science and Data Governance as end users can now edit and publish their data directly to a secure database, making sure that there is full control over this protected data.

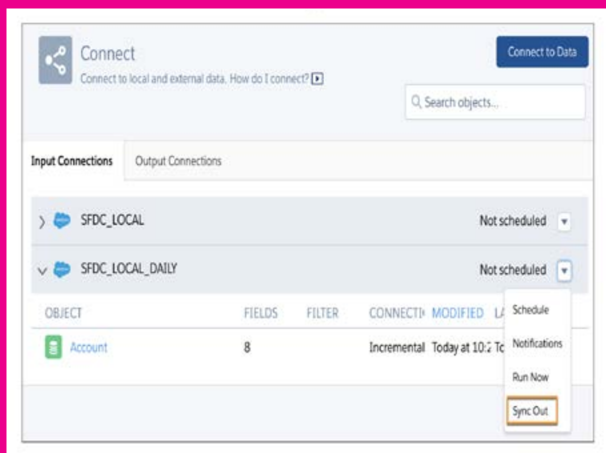
"The analytics team at Nextview has a strong history in SAP before focusing on Salesforce, so the SAP HANA integration combines our expertise of SAP and Tableau perfectly. With these new features now implemented in the Tableau Product Suite, it is exciting to see that Tableau is becoming more useful for Enterprise Analytics in big organizations."

Darren Aletoe, Consultant Data & Analytics

Salesforce bridges the gap between Tableau CRM and Snowflake

Summer 20 release had some new Beta features available between Tableau CRM and Snowflake. These two features, Live Connection and writing from Einstein to Snowflake, are now becoming General Available.

Salesforce & Snowflake are also rolling out new features in beta, our favorite is called "Sync Out". Without any extra setup you can now sync data directly to Snowflake. As soon as an object sync is completed, and sync out enabled, the object data is synced directly to Snowflake as well. This means you can push the data in the same condition as Analytics received it from Salesforce, with no additional processing time. Applications connected to Snowflake will be using the most recent Salesforce data. This new feature will save users a lot of time in setup or manual syncing data as you can be sure that Snowflake data is always up to date.



"We are really excited Salesforce is putting a lot of effort into the Einstein - Snowflake connection as we think Snowflake can be of real value in being your central data hub."

Ralph Knoops - Senior Consultant Data & Analytics

FINANCIAL SERVICES CLOUD

Top new Financial Services Cloud Features in Winter '21!

Financial Service Cloud winter '21 bring us exciting new features:

- Compliant Data Sharing! Advanced data sharing configuration to improve compliance with regulatory requirements is now available for all Financial Services clouds
- Improved UI & UX for Financial Services Client Portal community for users making digitizing the Mortgage Process on Financial Services Cloud much better
- Enhancements in Policy Component (Insurance for Financial Service Cloud)

Mortgage for Financial Services Cloud

Improved UI & UX for Financial Services Client Portal community

With the introduction of the Financial Services Client Portal, Salesforce made the mortgage process easier, more efficient and more transparent for both the borrowers and the loan officers improving the straight through processing experience for all stakeholders involved.

- Use the new community template to build out and brand a self-service Financial Services Client Portal.
- Enhance user experience further by adding three new flow screen components to:shows the most recently updated, non-closed loan application for the user or to lets community users launch the financial services cloud flows as well as shows summary sections for selected mortgage objects based on the Unified Residential Loan Application

If you are using Mortgage for Financial Services Cloud Salesforce has many more new features that you will be happy to discover; for example:

- New Summary View Lightning App Builder Component
- Change Data Capture for Mortgage Object Record
- Analytics for Mortgage App

Insurance for Financial Service Cloud

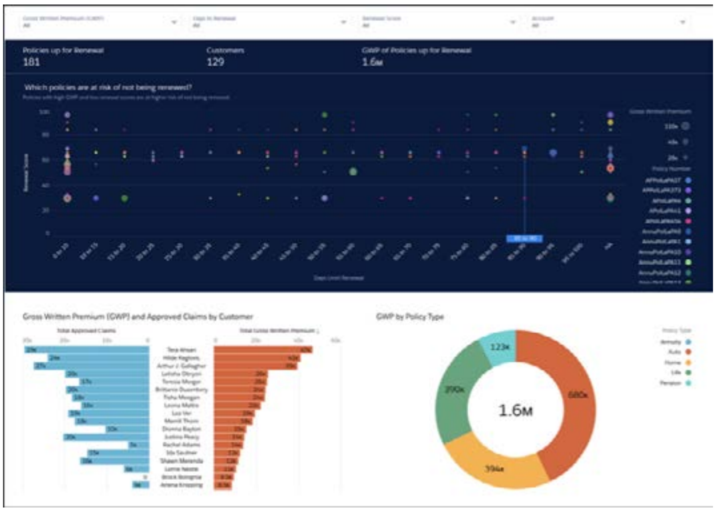
Enhancements in Policy Component

For Financial Service Cloud Insurance users Policy Component lies in the heart of almost every process. That's why it is so important that in the Financial Service Cloud winter '21 release Salesforce has brought us an important enhancement to this feature. We can now:

- Use the Policy Component on the Household page
- Use record type filters to show different sets of policies on different instances of the Policy component
- Add Policy Records Directly from the Policy Component

But there is more that have been added to the Financial Service Cloud Insurance! We can now create account relationships for claim, customer property, business milestone, insurance policy, and person life event records that will help us simplify a partner's access to Insurance records without complex sharing rules.

And last but not least there is a new Einstein Discovery for Insurance Analytics template! You can now make data driven decisions about for example likelihood of policy renewals and predict your clients Insurance needs.



"This release is all about combining the innovations that are happening! Let me give you an example; in the mortgages market customer friendly, efficient and compliant processes seems to be the basis needed for success. With the Winter'21 release the Client Portal community has just made a large step on improving user experience whilst being able to automate processes using the new compliant data sharing capabilities and to top this off; when customers share sensitive information we can now encrypt this data! At individual level they might seem like logical steps; when combined they have a huge impact on giving you the capabilities you need!"

Nikolaj Kiepe, Industry Lead Financial Services at Nextview

Mortgage for Financial Services Cloud

AI predictions for Churn and customer growth!

Use the new Predict apps in Einstein Analytics to increase your Wealth Management capabilities. Powered by Einstein Discovery stories, the new Predict apps create predictions on the churn of your client accounts and the likelihood to grow your account assets.

- Minimize the attrition rate using the power of Einstein Discovery. Use the template to create the app with dashboard visualizations of the predictive risk of account churn
- The Predict Client Churn Risk for Wealth Management Analytics app assists financial advisors to predict customer churn and helps them take timely action to prevent it.
- The Predict Likelihood to Add Assets for Wealth Management Analytics app assists financial advisors to forecast the likelihood of investors adding assets to accounts. The app prescribes actions on how to increase the likelihood using the power of Einstein Discovery. Use the template to create the app with an embedded dashboard visualization of the predictive likelihood to add assets to an account.

"With the Winter '21 release updates Salesforce makes it more and more difficult for the companies in the financial sector to ignore the fact that Financial Service Cloud can bring a significant enhancement to the company's overall performance."

Ewa de Vries - Senior Salesforce Consultant

MANUFACTURING CLOUD

Top new Manufacturing Cloud Features in Winter '21.

There is something to celebrate, Manufacturing Cloud is turning one this year! General available since October 15th 2019 and officially launched at Dreamforce 2019, Manufacturing Cloud is seeing the fourth Salesforce release with Winter '21.

Developed to support and enhance the Sales & Operations Planning (S&OP) process, Manufacturing Cloud is built on the Accounts & Opportunities objects, while extending the existing Sales Cloud forecast functionality for Manufacturing specific purposes.

A quick rundown of the core functionality of Manufacturing Cloud:

- Run rate business in the S&OP forecast. A new object called 'Sales Agreements' is created for this purpose. With schedules for agreed quantities and revenue, the forecast of the run rate business starts to build. By adding the actuals to the Sales Agreements based on the actual order volume, the forecast and realization is monitored closely.
- Account Based forecasting. Sales & Operations Planning and forecasting in Manufacturing is predominately based on Accounts. In Manufacturing Cloud, both the opportunities and the run rate business, through the Sales Agreement, are included in the forecast for the account.
- Collaboration with partners, dealers and resellers. Through the Salesforce Community Cloud, using a Manufacturing specific template, and Salesforce chatter, collaborating in real-time on the Sales Agreements and Forecasts.
- Analytics. Based on Einstein Analytics, standard reports and dashboards for Manufacturing Cloud are available.

So, what's new in Winter'21 for Manufacturing Cloud? The core functionality for Sales Agreements and Account Based Forecasting will be extended and made more flexible through configuration options (explained in more detail below). New functionality is added for Rebate Management (pilot in Winter'21), the use case being to set up, manage and monitor the Rebate Programs.

Rebate Management functionality in Manufacturing consists of:

- Set up, managing and monitoring of Rebate Programs based on Volume, Revenue, Growth and other types incentives with automated payout calculations
- Point in time payout calculations and exposing this to members
- Intelligent rebates; prescriptive and intelligent program & payout performance insights based on Einstein Analytics

The enhancements for Sales Agreements and Account Based Forecasting are:

- Improved flexibility to configure Sales Agreement renewal period based on organizational needs. This used to be fixed 60 days before a renewal could be done, from now on this can be configured to be something that is more suitable to the actual situation.
- Account Opportunity probability can now be included in the Account Based Forecast calculation, providing a more accurate forecast
- The definition of with Accounts to include in the Account Based Forecast can now be based on list views and list view filters, providing more flexibility in the forecast calculation.
- Account Opportunity quantity and revenue schedules can now be included in the forecast calculation (pilot), providing a more accurate forecast.
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- Account Opportunity quantity and revenue schedules can now be included in the forecast calculation (pilot), providing a more accurate forecast.

Salesforce is also sharing the key considerations for Product Innovation. For Manufacturing Cloud this based on four levers:

- The Industry Data Model
- Business Planning
- Channel Management
- Analytics and Insights

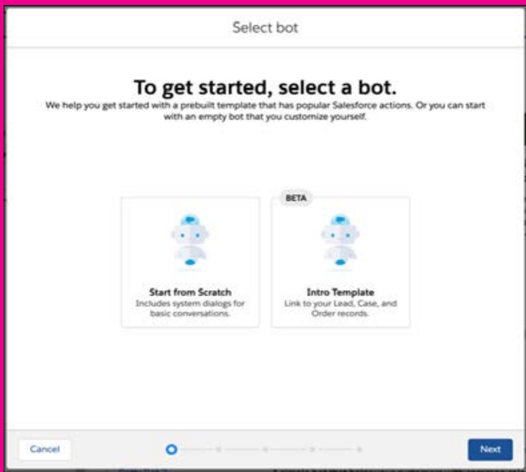
SERVICE CLOUD & FIELD SERVICE LIGHTNING

Top new Service Cloud & FSL Features in Winter '21.

Einstein for Service gets smarter once again

Einstein for Service brings us a lot of AI-powered functionalities that will help Customer Service teams work smarter, by learning from your agents' behaviour and using these learnings for automation.

A great way to scale up your Customer Service case handling capacity and increase case deflection is by setting up an Einstein Bot. This will become a lot easier with the Winter '21 release, as the Guided Setup Flow for Bots has been updated to also facilitate less experienced Bot builders. Builders can choose to create a Bot using a template that includes popular Salesforce actions like creating a case, adding a case comment or looking up an order.



Service Cloud/Guided Setup Bot

Einstein Case Classification is a great way to enhance Case data and automatically qualify cases. Curious to find out what Einstein Case Classification can do for you? The free 'Try Einstein' version of Case Classification now recommends field values directly after case creation, as opposed to every hour. This will give you a better understanding of what this functionality can mean for your business.

In our last Release Paper, we introduced Einstein Reply Recommendations. We are glad to share that with the Winter '21 release, support for eight additional languages was added in pilot: French, Dutch, German, Spanish, Italian, Danish, Swedish, and Turkish.

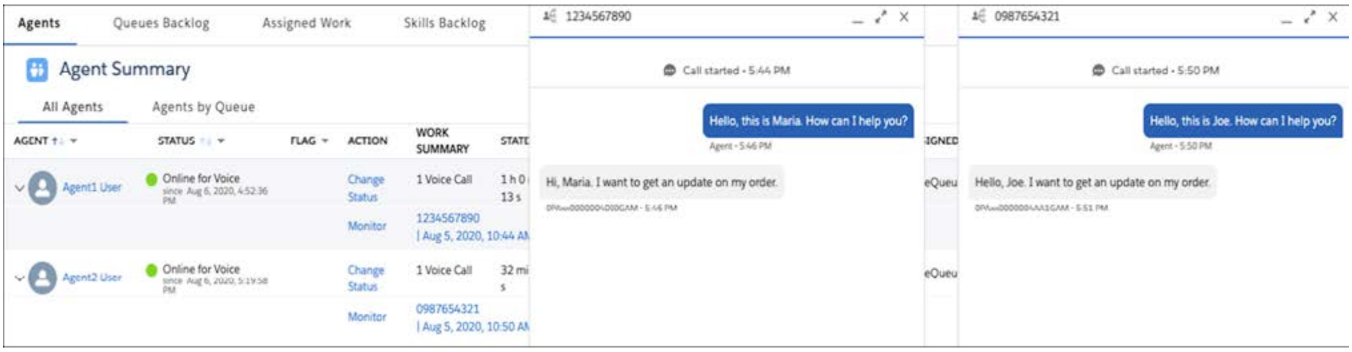
"Using AI solutions for Customer Service shouldn't be aimed at replacing human interactions, instead, it's actually a great tool to add more value to these human interactions and make them more efficient."

Stef van den Oever, Customer Practice Manager

Enhance your omni-channel strategy with Service Cloud's engagement channels

In the last Release Paper we introduced Service Cloud Voice, which is a great way to embed your telephony channels into Service Cloud. The Winter '21 release brings this powerful set of functionalities to Sales Cloud as well! Additionally, this release unleashes the full power of Salesforce's automation tools like Process Builder and Lightning Flow to be used on the Voice Call object, allowing you to configure complex automations whenever Voice Calls are created or edited. On top of that, the Voice Call object now supports Macros and Quick Actions.

Another powerful added functionality is the ability to monitor phone conversations, through their live transcripts, in the Omni-Channel Supervisor. This works similar to monitoring live chat conversations.



Other channels also attain updated functionalities in the Winter '21 release. For instance, Skills-Based routing is now available for Messaging Sessions and Chats, giving you even more capabilities to guide chatting customers to the right agent.

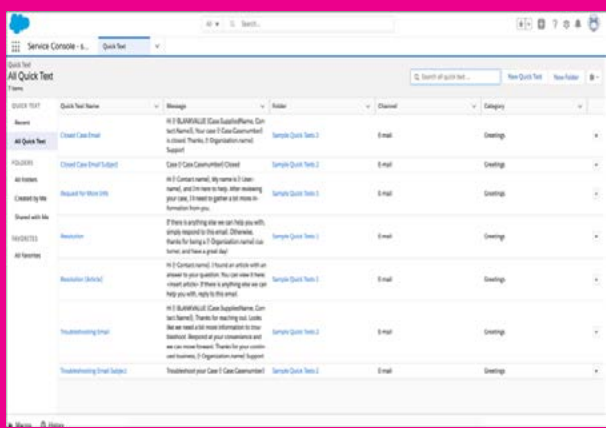
"As Omni-channel is becoming more and more embedded in the complete customer service experience. It's great to see Salesforce is continuously expanding the tool set at hand for agents and supervisors across all channels!"

Frank Visser, Managing Service Cloud Consultant

Boost your service agents' productivity with these new Service Cloud functionalities

One of the challenges we usually encounter during a Service Cloud rollout, is the use of unattractive Reference IDs in email subjects and bodies to ensure a response gets linked to the corresponding case. With the Winter '21 release, outbound email Reference IDs will be nicely hidden in the email header, allowing for an aesthetically pleasing email experience and a more secure way of linking emails to the correct case.

This release also introduces quite some prebuilt content to assist you in effortlessly rolling out functionalities like Lightning Flow, Macros and Quicktext.



Service Cloud/Guided Setup Bot

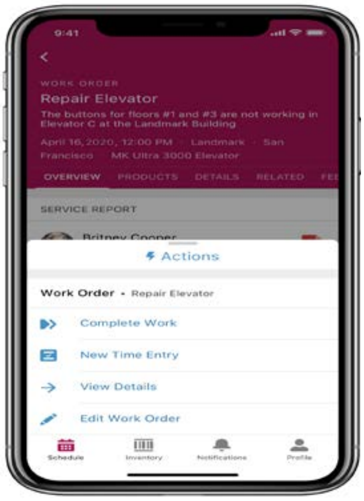
Say goodbye to Field Service Lightning - say hello to Field Service!

The fact that Field Service Lightning is lightning fast no longer needs emphasizing, Salesforce must have thought. From now on, Field Service Lightning will simply be referred to as Field Service. This change will be purely aesthetical, as it will not impact namespaces, developer field names, permission sets or custom permissions.

Now on to the more serious improvements in this release. The Winter '21 release introduces a standard method of storing Product Warranties. Generic Warranties can be linked to Products and Product Families. Furthermore, for specific assets, additional or extended warranties can be registered. This information can be an important driver of your Field Service planning and invoicing.

In the area of planning, travel times can now be calculated more reliably using Street-Level Routing. This method of calculation will also take into account actual speed limits and turn-by-turn data and will become generally available with this release.

Also, the Action Launcher (the heart of field workers productivity) has been redesigned to allow for easier execution of actions during Service Appointments.



"It is great to see that we now have the availability of a native data model to track warranties of equipment owned by customers. Having the ability to record details about standard product warranties and extended asset warranties will help employees throughout the company; from service agents planning an appointment, to mobile workers starting claims for a faulty product. Where we had to custom build this before, it is now available out-of-the-box!"

Jefrey Schmidt, Service Cloud Consultant

SALESFORCE MARKETING CLOUD

Top new Pardot & Marketing Cloud features in Winter '21

Interaction Studio & Sales and Service Cloud

Interaction studio (previously known as Evergage) already allows marketers to personalise every touchpoint in the customer journey on a large scale. Using smart algorithms, Interaction Studio provides personalised interactions like email, SMS, advertising & website pop-ups. This brings marketers endless possibilities to make every touchpoint a conversion winner and, in turn, generates valuable insight into what customers like or dislike about your customer journey.

By adding the intelligence of Einstein to this product, Interaction Studio now gives you the power to combine in-depth behavioral analytics and advanced machine learning with data from existing sources like Sales & Service Cloud. This enables every Sales & Service agent to offer a personalised experience. The integration with Sales & Service Cloud enables you to use your existing Einstein recommendations or Next Best Actions based on even more data, captured by Interaction Studio. To see this in action, please check out the product video from Salesforce via this link.

Distributed Marketing enhancements

Distributed Marketing enables non-marketers to inform customers about new products, upcoming exciting events and to sell at scale. Distributed Marketing gives Sales & Service agents the tools to tailor interactions with customers, by giving them the power of Marketing Cloud. This also enables corporate marketers to build branded templates, journeys and interactions available for use by Sales & Service users. This ensures the use of your corporate communication & marketing strategy at every channel, including your Partner affiliates.

"Marketing Clouds' latest release gives every Marketeer the opportunity to take advantage of the power that Einstein brings to the platform. Especially the new features for combining Einstein & Interaction studio enable marketers to personalise every touchpoint with customers! Besides that, it brings some more structure to the development and configuration of journeys, to make it even easier to use as a product."

Juul Stienen - Marketing Cloud Consultant

Distributed Marketing enhancements

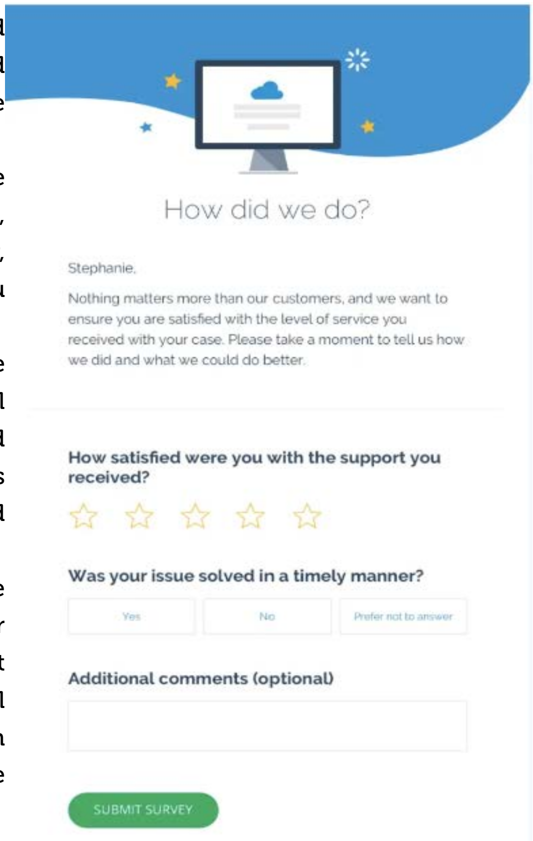
With this release, Distributed Marketing has gained some new features, which will improve your productivity and gives your team more control over the Distributed Marketing process.

1. **Approvals on Bulk sends or Quick sends:** Besides giving business users the power of sending out marketing messages to your customers, you might also want some control over these exchanges. This new functionality allows users to ask for approval on scheduled messages. If the approval is not completed when the scheduled message is due to be sent, it will be cancelled. This secures your control over what a customer receives.
2. **Preview bulk messages:** When scheduling bulk messages for a set of customers, you are now able to preview the message for 100 unique messages including their personalisations. Previously, you were only able to do this for 10 messages, without support for personalised messages.
3. **Distributed Marketing on to Go:** New in this release is the added control of your distributed marketing processes on large format mobile devices, like Tablets. This gives you the ability to send out personalised messages to your customers when you are on the move or not able to use a desktop.

Journey Builder Improvements

This Marketing Cloud release provides some new features and improvements on Journey Builder, to make it even easier to build personalised interactions within your customer journey. Some of the features we would like to highlight are:

1. **Pre-fill interactive e-mail forms:** Some releases ago, Salesforce Marketing Cloud announced Interactive email forms. Through these, customers are now able to fill out forms, for instance a five star review, without leaving their email application. This release also enables you to pre-fill those forms based on your known data.
2. **Transactional Journeys:** This new type of Journey gives you the ability to set up a very small and quick journey for transactional sending. For example: a customer fills out a form on your website and you want to send out a personalised confirmation. Configuring this via the Transactional Sending API, you get immediate sending and near-real-time operational metrics within your journey.
3. **Behavioral Triggers:** This new feature enables you to re-engage customers based on historical actions. For example: A customer added several products to their wishlist in the mobile app, but left the app before adding them to the shopping cart. Using behavioral triggers, you can set up a custom journey which will follow-up on these kinds of actions with the goal of re-engaging, increasing the chances of converting wishlist items into a filled shopping cart.



"Salesforce Journey Builder gives our customers the opportunity to design a complete customer journey with personalised interactions based on Sales & Service data. This enables our customers to scale their marketing efforts very efficiently and build valuable customer relationships."

Stef van den Oever - Practice manager Customer Experience

Lightning Email Builder in Pardot

The creation of Emails in Pardot is redesigned and it has never been so easy. The new Content Builder of Salesforce has also landed in Pardot as the Lightning Email Builder. With this functionality the new Email Builder is user-friendly and gives an end-to-end email experience with the power of the Lightning Platform. Reusable Components and buttons with the Drag-and-Drop Content Builder, use images from CMS and style and personalize the emails without any troubles. A preview, improved testing and resend List Emails, it's all there in the new Winter '21 release of Pardot. The Content Builder is automatically added and can be found in the Salesforce App Launcher. Emails will be records and by editing an email record you will enter the builder.

What comes with the new Email Builder

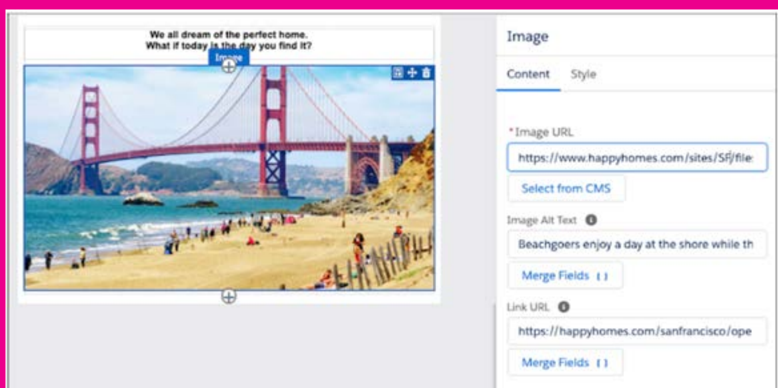
Create components with the Drag-and-Drop functionality. The components are reusable blocks which are already in use for Record Pages, Page Layouts etc. and it's available in Pardot now. Buttons don't have to be hard-coded anymore and can be dragged into the Canvas within one movement. The buttons can be styled by color, size and shape. The use of HTML Tables is over and by filling in the number of columns this can be defined easily (with a maximum of 4).
Mobile becomes more important and emails built with the Email Builder will be responsive for any device. And last, it will be possible to make use of HML to replace the Variable Tags for merging fields and make your emails personal.

Images with Salesforce CMS

You won't have any copy/paste errors anymore when you try to insert any images. In the new release Pardot makes use of the Salesforce CMS and it gives users the power to quickly select images for their Email Templates. CMS images are available in image and HTML components, the rich-text editor, and the background.

Improved Send and Test Experience for Emails

To preview as a Prospect or do a trial run before sending the email, you go to the Email Content record. And when you decide to send the email for real, Salesforce gives marketeers full control. Select a Campaign, Recipient & Suppression lists, Sender Options and Completion Actions all in one go. Emails can be resend and will be visible in the Related tab of the record.

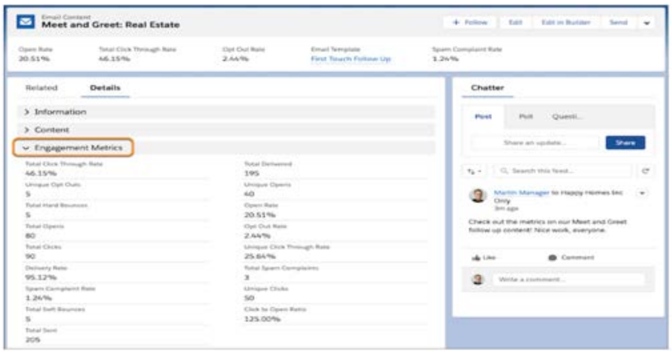


Resend List Emails

No need to clone your emails anymore, it's possible now to resend your List Emails which makes it faster and less sensitive for errors.

Review Aggregate Email Metrics in Lightning

Each Email will exist as a record and Engagement Metrics give an aggregate view on statistics like Open Rates, Unique Opens and Opt Outs. No setup is necessary as it will be shown on the Email Template and Email Content Detail pages.



Analytics and Reporting

Success Milestones for Pardot Einstein Attribution

Pardot Einstein Attribution (Summer '20) combines Campaign Influence with Einstein's AI to assign the influence of Campaigns on Opportunities even more accurately. The creation of Opportunities is used as the default Milestone, Salesforce comes up with a new Success Milestone functionality. It gives your business the opportunity to set a certain Stage as the most important Checkpoint during the Opportunity process, and it will help to track the Campaign Influence even better.

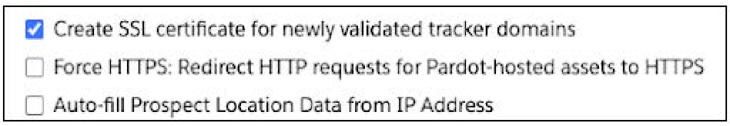
Understand Your Customer with New Campaign Insights

Einstein Campaign Insights helps to show what factors drive Campaign performance and find new audiences. In the new Release trend information about the Prospect's company size will be added and it will help you even more to find engagement patterns with your Campaigns and Assets and to target the right people.

Marketing Assets and Domains

Secure Pardot Tracker Domains automatically

Admins needed to enable SSL certificates manually for all Tracker Domains, but now a new option is there in Pardot to automate this process. Just by enabling this option, SSL Certificates are created automatically.



Use any Tracker Domain to customize Pardot Assets

You can make use of any Tracker Domain to customize the links for Form Handlers, Dynamic Content, Social Posts and Multivariate Landing Page tests. Only emails without templates will be left out of this functionality.

"It's great to see the development in Pardot Einstein Attribution. The feature helped a lot already to solve the gaps left in Campaign Attribution and I believe even more gaps will be filled with Success Milestones. It gives more flexibility in the lifecycle of the Sales process and makes it easier to pinpoint what moment is important to your business".

Jelle Schippers - Salesforce Consultant

B2B COMMERCE LIGHTNING

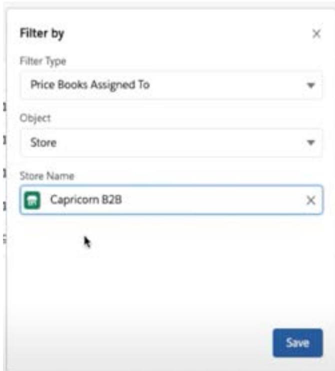
Top new B2B Commerce Lightning features in Winter '21

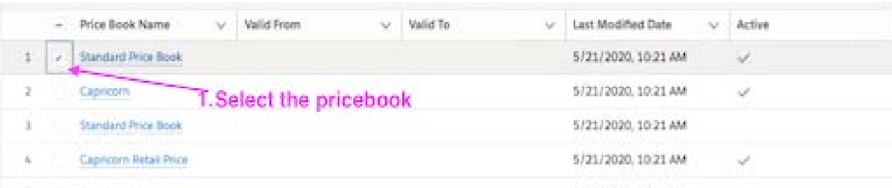
Pricing workspace

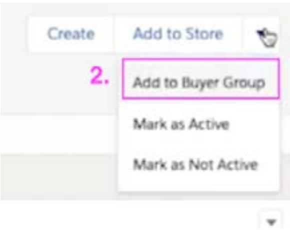
The 'Pricing Workspace' is a centralised hub where Pricing Managers can view Price books and Price Book entries from the same view.

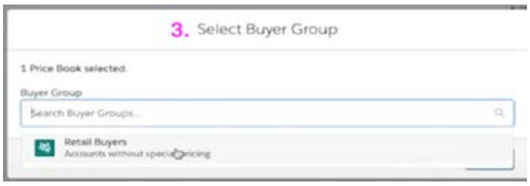
Some of the cool features include:

- Creating filters to find out which Price Book is assigned to a specific B2B Store:
- Adding Price books to Buyer groups in just a few clicks:

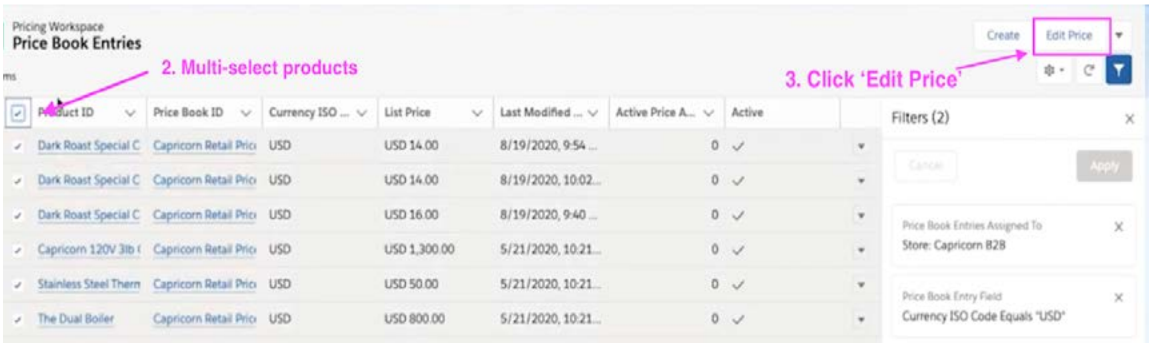








- Mass edit prices based on percentage or amount!

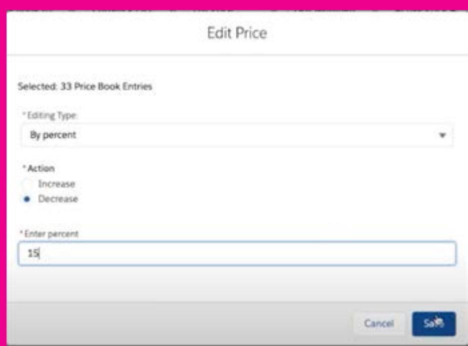


Guest Browsing

The 'Guest Browsing' feature goes pilot with the Winter '21 release. Current B2B Customers should request to be nominated for the pilot and speak with their Customer Success Manager.

Guest browsing offers the following benefits:

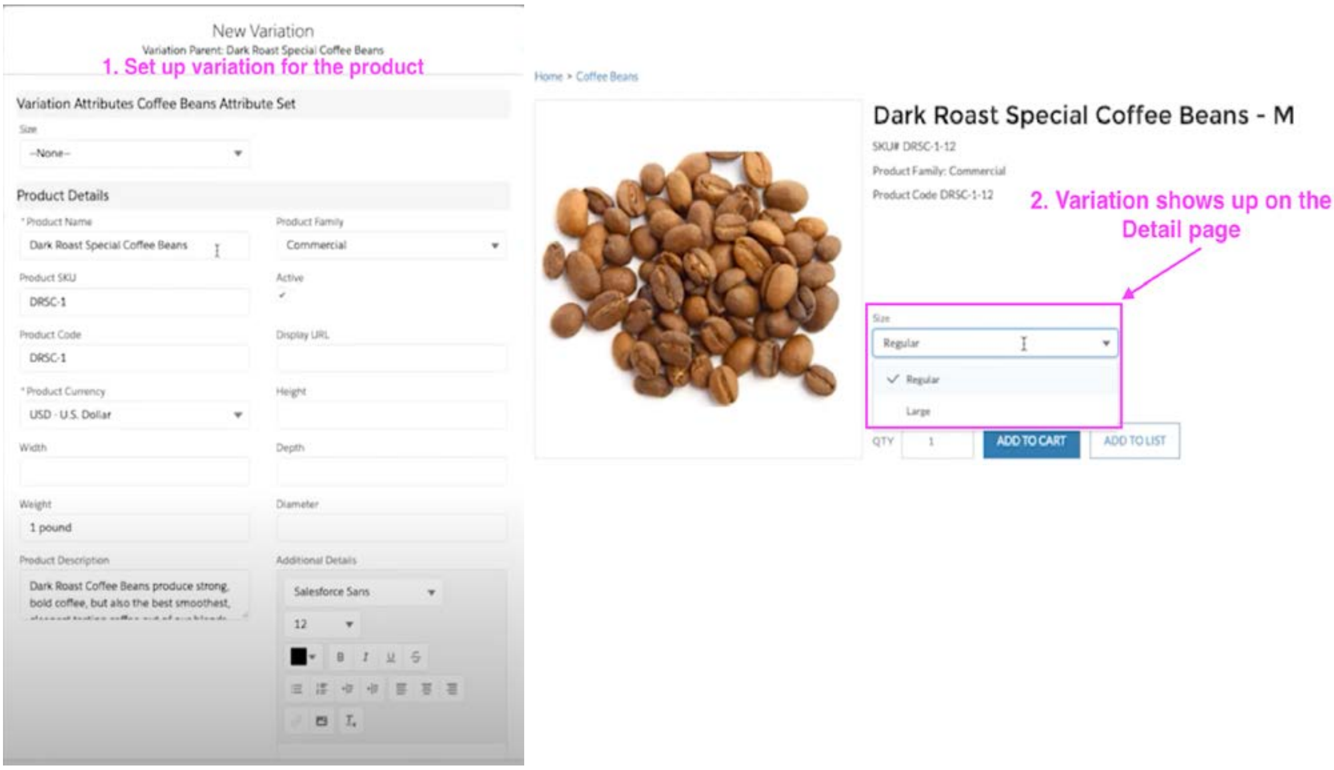
- Customers are able to browse without 'Logging in' making the experience more flexible
- Search engine crawlers are able to index the website increasing the discoverability
- End customers of the company are able to interact directly with the brand



Product Variations

The 'Product Variations' feature goes pilot with the Winter '21 release. Current B2B Customers should request to be nominated for the pilot and speak with their Customer Success Manager.

For instance, a coffee supplier could add variations such as 'Bean Size' and 'Colour' to be shown together on the Product Detail page. This reduces SKU proliferation and ensures buyers have a smoother Customer Experience.



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Upcoming webinar: 27 October at 10:00 hrs: How Salesforce Commerce drives value in a B2B marketplace. Register here!

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