nextview...

Salesforce **Release Paper**

# Spring | 2022

# Salesforce **Release Paper** Spring '22



Introduction
**Huub Waterval**
CEO Nextview

**Huub Waterval**
CEO Nextview

# Dear Trailblazer,

**With Spring almost around the corner, we look forward to another promising year. We continue to keep growing in both the Netherlands and Germany and kicked 2022 right off with a lot of new joiners. Some of our colleagues even hit the 10 year mark at Nextview! Proud of such loyalty and the steps we're taking, we are happy to share the most recent updates from Salesforce with you.**

In this seventh Release Paper, we have gathered the most interesting new functionalities from the latest Salesforce release. It comes at an exciting time. We have become Slack Service Partner in Europe, which allows us to further align people and processes for an even more excellent customer, partner and user experience. In the meantime, we continue to celebrate our current partnerships with Salesforce, MuleSoft and Tableau.

As a Certified B Corporation, we believe in taking responsibility for our company, our people and the planet. We like doing the good stuff, like battling litter with Maas Cleanup or raising money (no less than € 36.000,- last year!) for the Vick Brownhuis. We are proud of being announced a Great Place to Work in

the Netherlands for the fifth time on a row and to be voted top employer in Germany in the small and midsize enterprises sector by FOCUS-BUSINESS.

For now, we hope you feel inspired by all the new Salesforce possibilities we have listed for you. Feel free to contact us for a (virtual) cup of coffee or a first remote digital engagement in case you have any questions. We are more than happy to help improve your business.

Happy trailblazing,
On behalf of all your friends at Nextview Consulting,

**Huub Waterval**
**CEO Nextview Consulting**

Read on →

**Ana Kelly Campos**
Senior Salesforce
Consultant

# Sales Cloud

The Spring '22 Sales Cloud release brings functionalities that give sales teams a better overview of their sales pipeline, revenue and forecast. From ready-to-use calculated fields to a range of embedded dashboards, the enhancements of this release make it easy to visualize metrics on performance and points of attention. Opportunities insights and activity information in Pipeline Inspection, as well as highlighted changes in Forecast, are also among the main features of this release.

**Chapter topics**

> Core Sales Features

> Pipeline Inspection

> Revenue Intelligence

Read on →

"The new Sales Cloud features make it easier for sales teams to know where to put their efforts. With Pipeline Inspection AI-driven insights and calculated fields in Forecasts, sales managers and reps can easily see which metrics can mostly impact their results and where they should focus to reach their quota."

Read on →

## Core Sales Features

The Spring '22 release optimizes Forecasts by providing two calculated fields: Gap to Quote and Pipeline Coverage. While Gap to Quota gives a quick view on how close the sales team is to achieving their quota, Pipeline Coverage shows the ratio of opportunities in the pipeline compared to how much quota is needed.

In Forecast Settings you can enable these fields to be shown by default as columns in Forecasts.

Another improvement in Forecasts is the possibility to visualize changes in the forecast. The option Show Changes in Last 7 Days has been added to Display Settings. When selected, it will highlight increased and decreased amounts in the Forecast in the last 7 days.

Forecast Types creation has also been simplified and now can be done directly from Forecast Settings. Additionally, a filter for selecting Record Types is added to the Forecast Type setup flow.

In addition, this release improves territory management assignment rules by allowing users to exclude accounts from them. This is helpful, for example, when specific accounts need to maintain their original assignment even after an assignment rule is run. This is possible by adding a list of records you want to exclude from territory assignment rules to the Territory2ObjectExclusion object.

## Pipeline Inspection

The enhancements in the Pipeline Inspection help sales teams get a better understanding of their opportunities by using AI-driven insights. Sales teams can visualize information about opportunity metrics, insights that can influence a deal's likelihood of closing and other insights about the opportunity itself or its related account. This is all displayed in a side panel without leaving the current view in the Pipeline Inspection.

Another nice feature is the ability to visualize a summary of related activities to an opportunity in the Pipeline Inspection, including the total number of activities and a breakdown by type. The Activity tab will also show upcoming activity, next step and recent activities and it is possible to take action (such as sending an email) right from the tab. Additionally, it is possible now to edit multiple opportunity fields inline while reviewing the pipeline. When hovering over the field a pencil will appear if the field is editable. Besides, opportunities in the Pipeline Inspection can now be filtered by territory, territory team and opportunity team.

Pipeline Inspection is included at no cost in Performance and Unlimited editions. It is also included with Revenue Intelligence, which is available for an extra cost in Enterprise edition.

## Revenue Intelligence

Revenue Intelligence combines Tableau CRM dashboards and analytics with Pipeline Inspection to create an easy to visualize pipeline flow chart. The Spring '22 release includes three dashboards. The Overview dashboard shows the most critical information regarding your revenue performance, such as team statistics, quota attainment and on-track or off-track metrics, opportunities needing attention, opportunity changes and top opportunities. The Team Performance dashboard can present multiple metrics such as the sales leader, average win rate, open pipeline and activities completed. The Sales Performance dashboard displays how sales are trending over time with metrics such as Sales, Closed Opportunities and Average Days to Close.

Furthermore, you can now see changes to opportunities in different categories from the Flow tab. It is possible to filter opportunities considered in the chart by close date and user and also to select the period which you want to be displayed.
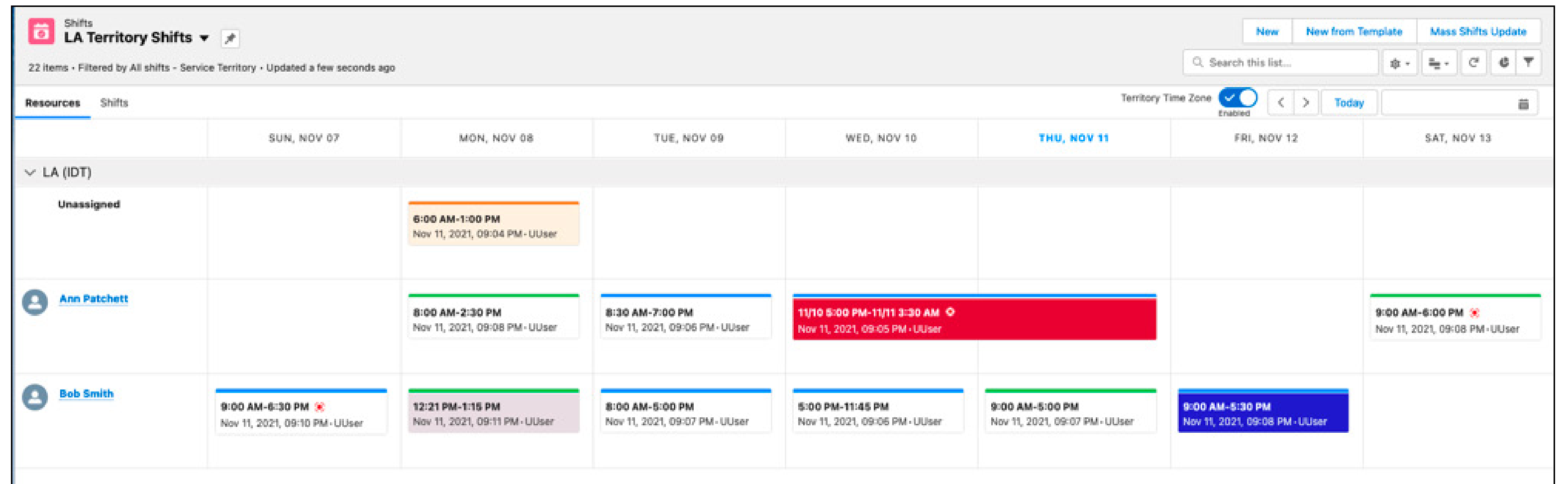


**Read on** →

**Aleksandr Shumilovskyi**
Salesforce Consultant

# B2B Commerce Lightning

This Spring '22 release brings more exciting enhancements to Promotions. You can make use of new types of promotions, offer coupons, fixed discounts and have more product promotions with an increased limit. Salesforce Administrators will be delighted with the changes that have been implemented to Add Product Workflow. The number of clicks is reduced and the setup of new products is now consolidated in only one screen. Apart from that, you can add media to the products in bulk with a new way of importing images with CSV files. Let's take a look!

**Chapter topics**

> Promotions for B2B Store

> Add Product Workflow
   Improvement

> Import Products and Images

Read on →

"After Salesforce launched B2B Commerce on Lightning in the Summer of 2020', it's exciting to see how this product keeps on growing and enables companies to create exceptional ecommerce experiences for their business customers."

**Read on** →

## Promotions for B2B Store

This new release launches various changes regarding the promotions you can offer the buyers in your online store. Now, they can redeem coupons connected to a manual promotion with discount, qualifier and segment rules that you define.

Additionally, you can now offer fixed discounts on B2B Store Products. Previously only percentage adjustments were available, but now you can define what is best for your clients: for example 15% or 150$ off. Even more powerful is the fact that you can choose to deduct a fixed amount from either the unit or line item total.

Developers will definitely like the possibility to access Commerce Promotions API with Apex, because they can integrate promotions with their customizations more easily.

## Add Product Workflow Improvement

With the new Add Product Workflow, products can be added faster and in an even more efficient way. Previously you had to navigate to a different tab and add related records such as a price book and price once you created a product. Take a look at the image for a preview of what the 'Add Product' screen in the Spring '22 release looks like.

## Import Products and Images

The Winter '22 release brought the ability to bulk import products and related records at a global level, not for a specific store. The Spring '22 release now allows importing products for a specific B2B Store, which is a quite handy feature if you make use of more than one store and don't want specific products to appear in some of them.

Along with this, you will be able to import images and use them as the Product List Image or add them (up to 8 images) to the product detail page. No need to add them manually though: the CSV file for importing includes a new Media column where your image URL can be specified.

On top of that, the Product Workspace offers a new column: List Image, which displays any Product Image that is added.

| | | List Image | Product Name | | Product SKU | | Product Class | | Product Descript... | | Active | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | ☐ | | The Elite (Sample) | | | | Simple | | The Elite espresso ma... | | ✓ | ▾ |
| 2 | ☐ | | Testa Rossa Coffee Mac | | | | Simple | | The Testa Rossa Milk ... | | ✓ | ▾ |
| 3 | ☐ | | Capricorn I Group Espre | | | | Simple | | The Capricorn I group ... | | ✓ | ▾ |
| 4 | ☐ | | EspresSmart Espresso N | | | | Simple | | The future of espresso... | | ✓ | ▾ |
| 5 | ☐ | | The Infuser (Sample) | | | | Simple | | The Infuser delivers o... | | ✓ | ▾ |
| 6 | ☐ | | Bella Chrome Coffee Ma | | | | Simple | | The ultimate in coffee ... | | ✓ | ▾ |
| 7 | ☐ | | Medium Roast Coffee (S | | | | Simple | | Grown in Colombia's ri... | | ✓ | ▾ |
| 8 | ☐ | | Costa Rican Decaf Roas | | | | Simple | | A water processed de... | | ✓ | ▾ |
| 9 | ☐ | | Dark Roast Whole Bean | | | | Simple | | 2.5 lbs of dark roasted... | | ✓ | ▾ |

Back to chapters

**Kelvin Vrede**
Salesforce
Consultant

# Pardot

Let's be honest, 2021 was again a year in which the pandemic dominated. Fortunately Salesforce did not sit on their hands. In this part of the Spring '22 release we will highlight new features and functionalities regarding Pardot's enhanced landing page experience.

**Chapter topics**

> Customizing Form Styles

> Building Faster with Page Layouts and Breadcrumbs

> Reducing Email Fatigue
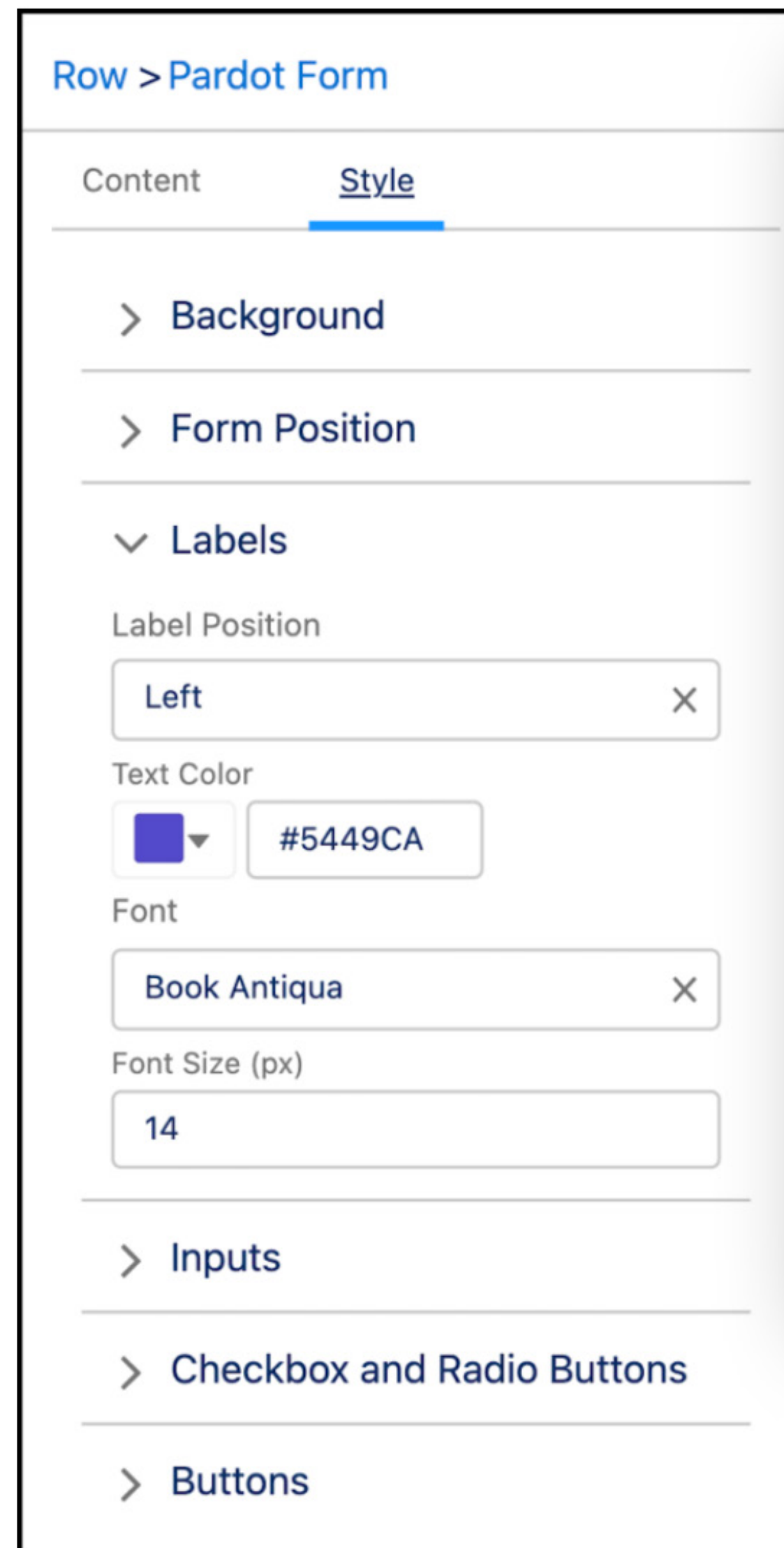
Read on →

"The new Pardot features and functionalities are not many. Nevertheless they will make the everyday tasks and life of an administrator or marketer a lot easier."

Back to chapters

## Customizing Form Styles

Customizing Pardot Form Styles in the Enhanced Landing Page Builder is a new addition to Pardot. You can now apply colors, fonts, margins, and more to a Pardot form. When editing the values in the Style tab, your changes appear on the canvas. How precisely? Simply drag in a Pardot Form component, then click the Style tab to access a variety of styling options.
This change goes for all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

Row > Pardot Form

Content | Style

> Background

> Form Position

∨ Labels

Label Position

Left ✕

Text Color

▪ ▾ #5449CA

Font

Book Antiqua ✕

Font Size (px)

14

> Inputs

> Checkbox and Radio Buttons

> Buttons

## Building Faster with Page Layouts and Breadcrumbs

New prebuilt layouts, available in the enhanced landing page builder, make it possible to build faster with page layouts and breadcrumbs. Dragging in rows and columns only takes a matter of seconds now. Also, the new breadcrumbs make it easy to edit rows. Breadcrumbs appear at the top of your editing panes to help navigate to a row and to easily add and style columns.

Now, how does this work? Upon opening an enhanced landing page, you can select a layout in two ways. Firstly (1), drag a layout from the component pane, or secondly (2) click '+' on the canvas and then (3) search or select the component you want to add. These changes apply to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.



Read on →
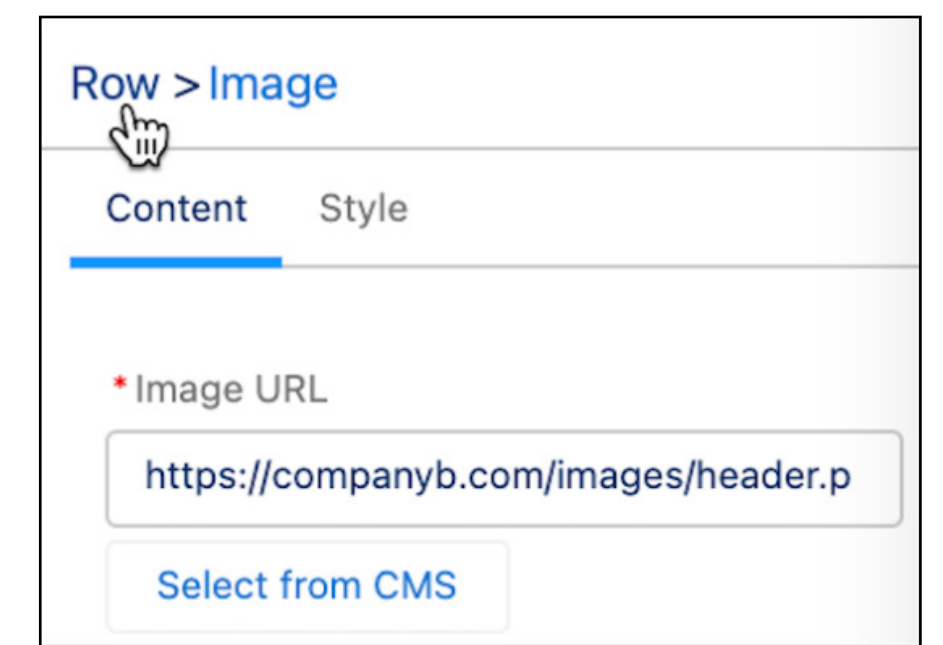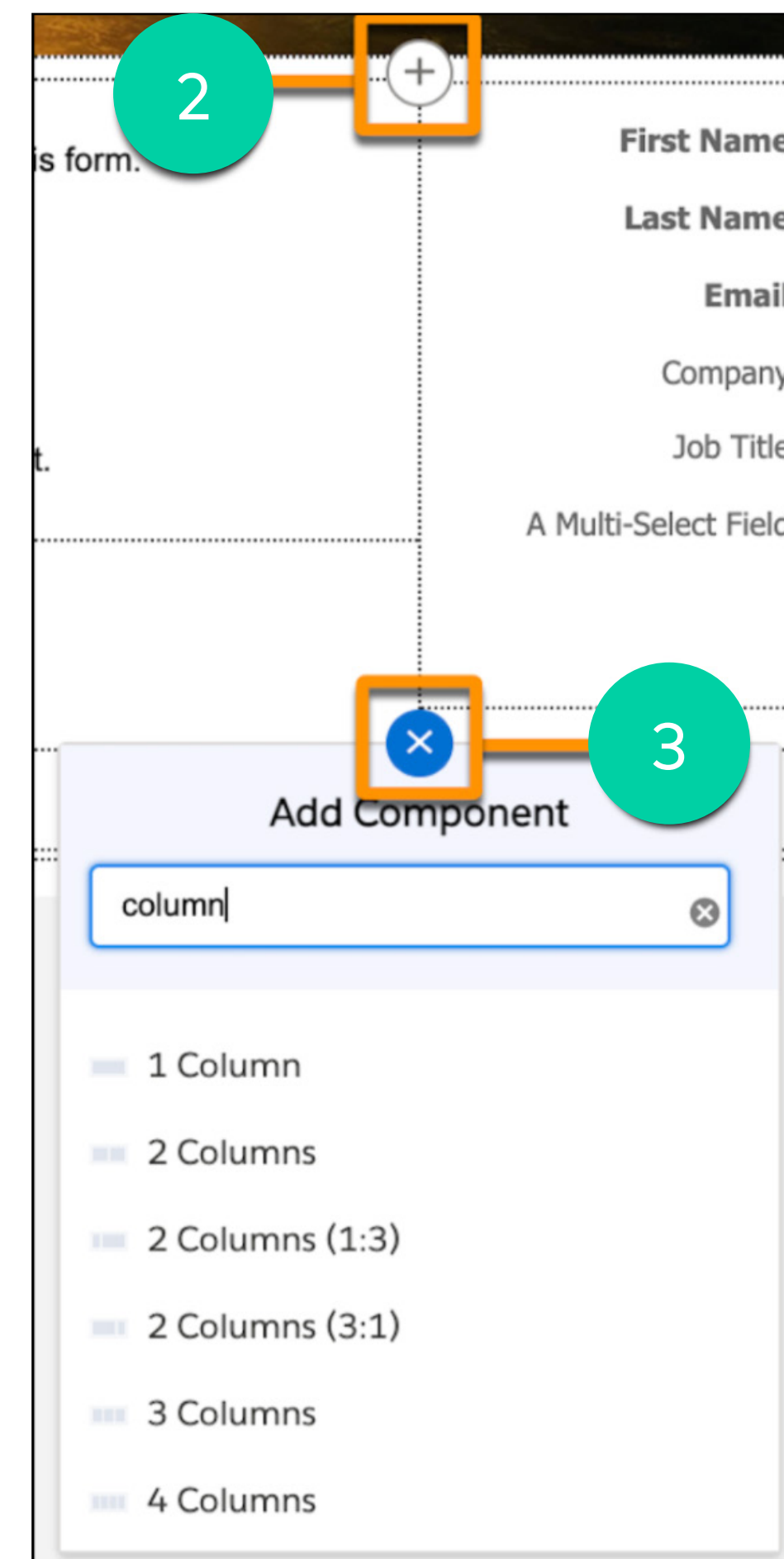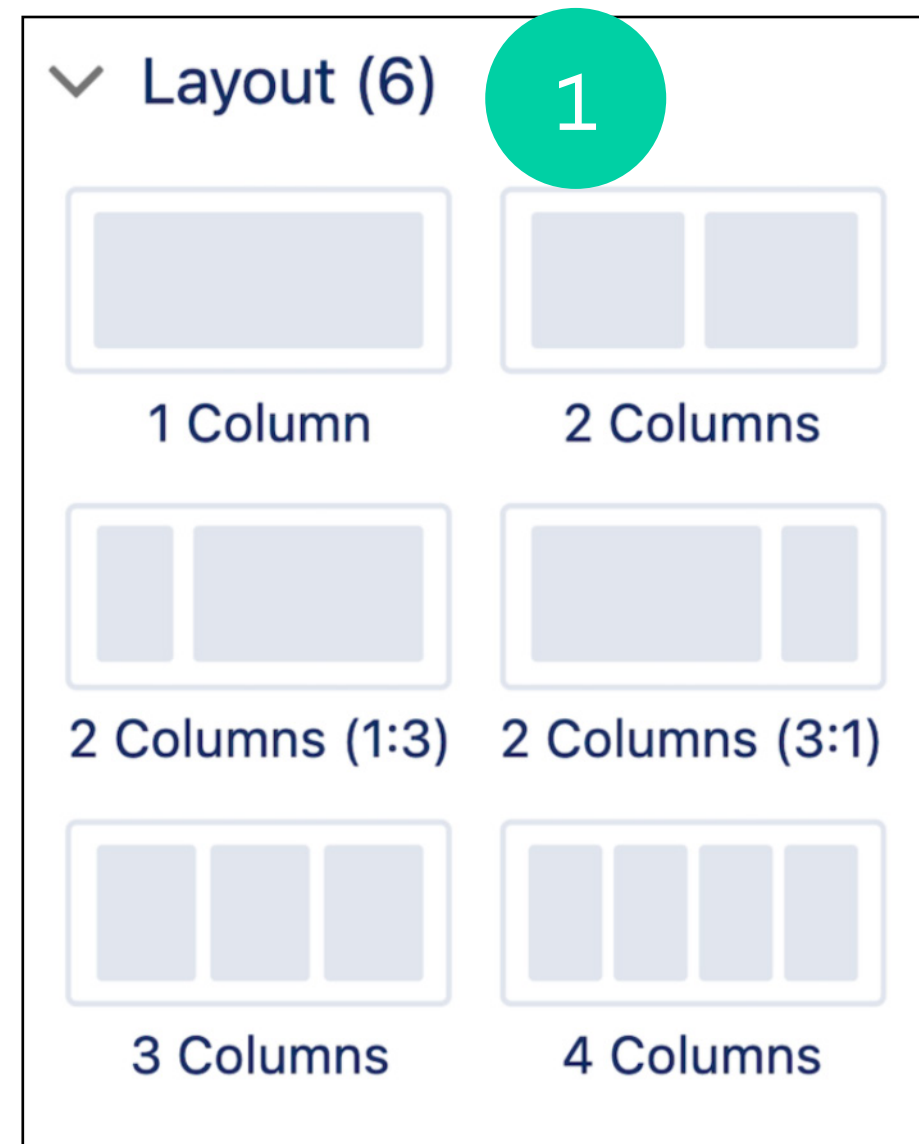
## Reducing Email Fatigue

Ever received too many emails from a vendor about their product offerings or yet another special deal? Imagine prospects who are weary of your emails: they start to ignore your messages, delete them, unsubscribe or - even worse - they send your emails to their spam folder. To mitigate the risk that you are sending too many emails to your customers, Pardot has a new feature to reduce this so-called email fatigue.

Your rescue hero is called Einstein Engagement Frequency, which scans individual customer engagement behaviors to predict the optimal sending frequency for marketing emails. The frequency category is stored in a prospect field and can be used to filter prospect lists or as criteria in Engagement Studio. Einstein Engagement Frequency can be enabled in Marketing Setup.

However, this only works when adequate data is detected. The model is typically trained within 72 hours. After frequency categories appear on prospect records, you can select the field as criteria to create dynamic lists or Engagement Studio rules. This change applies to Pardot Advanced and Premium editions with Salesforce Professional, Enterprise, or Unlimited editions.

### Briefcase Builder

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Create Briefcase | Select Data | Add Assignments | Select Apps | Activate Briefcase or Save for Later |
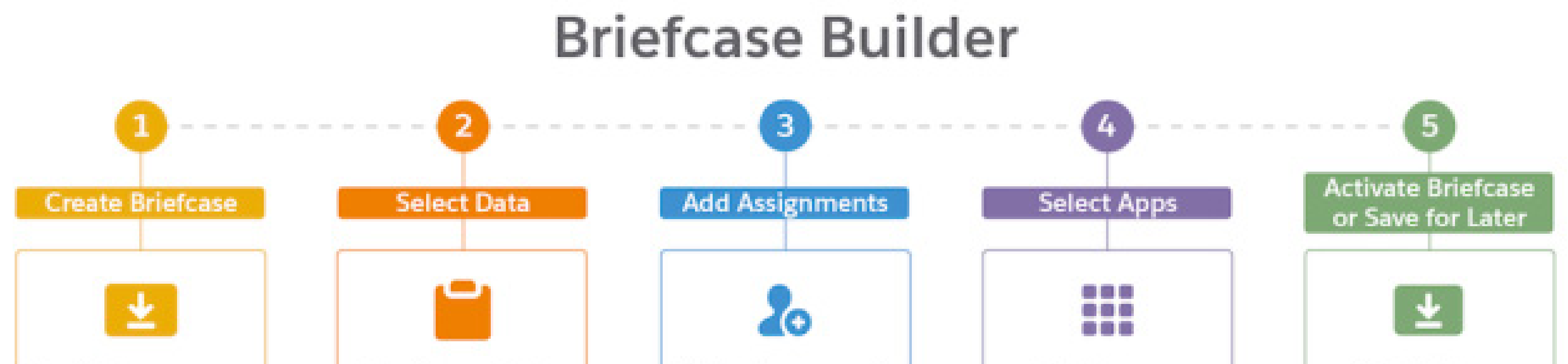
**Sjoerd Santegoets**
Solution Architect

# MuleSoft

**MuleSoft is the Integration and API Platform of Salesforce. While already being recognized as the only integrated solution for API management and Enterprise Integration, MuleSoft is further extending its reach. It's tapping into new communities with MuleSoft Composer, allowing business to connect apps and data. In addition, it is centralizing API management across the entire landscape by releasing the Universal API Management. This, combined with MuleSoft's continuous investment in new and improved connectors and accelerators, confirms MuleSoft's ambition to help you innovate faster with reusable and secure APIs and integrations.**

## Chapter topics

> Universal API Management

> MuleSoft Composer

> New and Improved Connectors

Mulesoft

"By extending its reach to new APIs, non-developer communities and new applications MuleSoft is delivering on its promise to enable faster innovation with reusable & secure APIs and integrations. "

Read on →

## Universal API Management

While MuleSoft already offered state-of-the-art API Management capabilities directly integrated with its Anypoint Platform, the new Universal API Management takes this one step further. With this solution additional design options are added (AsyncAPI and GraphQL) and the solution opens up to API's built on other platforms. This truly creates a single source of truth for all enterprise APIs, simplifies the management & governance of APIs across the entire landscape, and improves the reliability and monitoring of all APIs.

## MuleSoft Composer

While the Universal API Management extends its reach to other platforms, MuleSoft Composer increases its reach to non-developer communities by offering a tool with the ease of use and accessibility that allows non-developers to set up an integration without compromising on scalability, reusability and security. These integrations can be based on standard connectors (like Salesforce, Slack, Netsuite,

Workday, Jira and ServiceNow to name a few) but can also be based on integration assets provided by a MuleSoft developer. This not only takes away a potential bottleneck in integration development, but can also spur innovation as non-developers can quickly test and validate new ideas that require integration.

## New and Improved Connectors

Connecting to any application and system is MuleSoft's bread and butter which is why MuleSoft is continuously rolling out new and enhanced connectors and accelerators. Recent highlights include connectors around:
- Tableau for visualizing and analyzing data
- Mailchimp for managing and executing marketing campaigns
- Webshop integrations on Shopify
- Microsoft Dynamics 365 Business Central for ERP functionality

These connectors make it easier to integrate with these systems and reduce the time-to-market & TCO of your integrations.
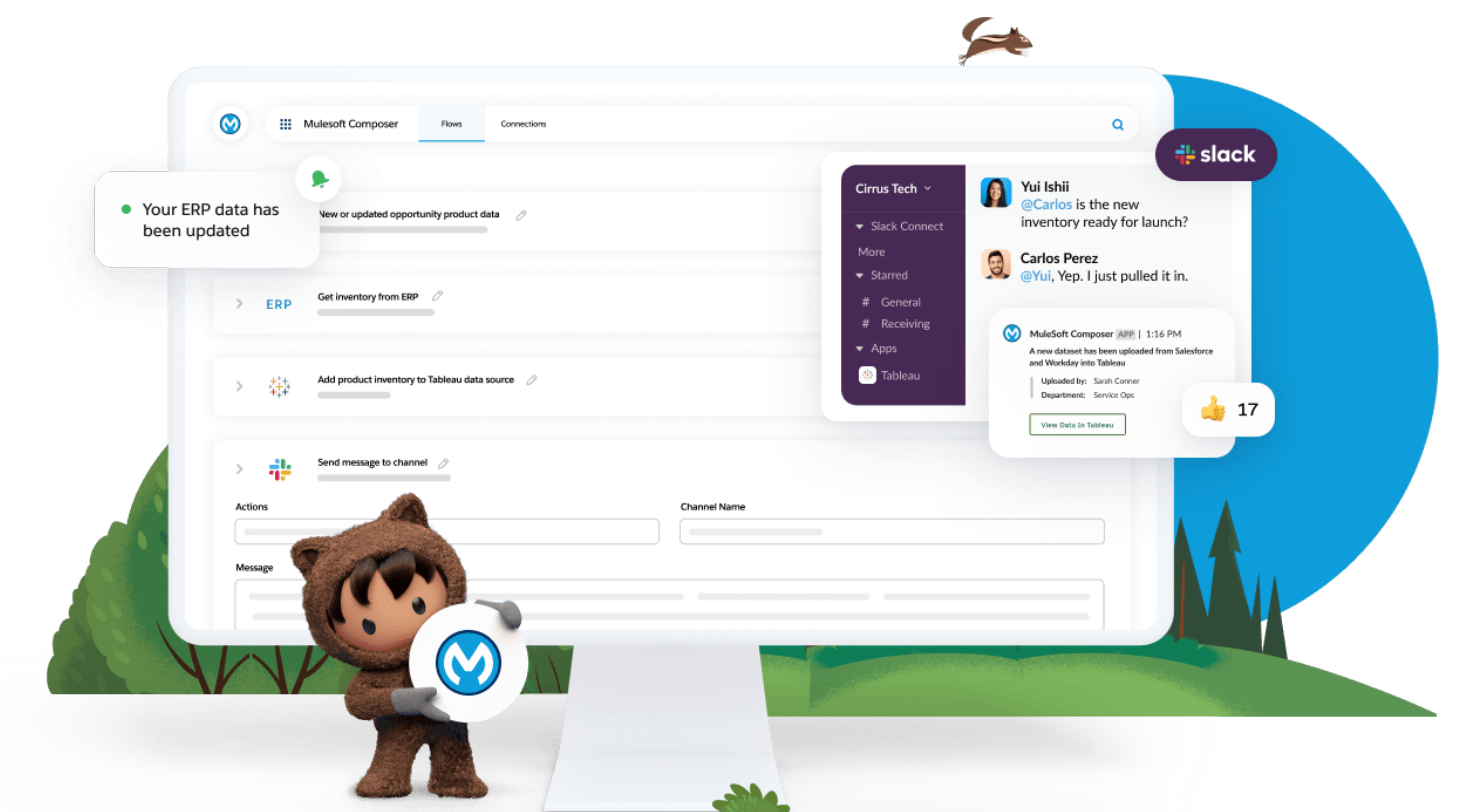
Read on →

**Chara Paschilidi**
Senior Salesforce
Consultant

**Ernst-Jan de Waardt**
Salesforce Solution
Architect

# Salesforce Platform

**With the Spring '22 release, Salesforce emphasis  the importance of Multi-factor authentication by making it mandatory for some common use cases. And quite a lot of improvements are introduced to the Flows. So let's dig into all of this!**

## Chapter topics

> Multi Factor Authentication (MFA)

> Flow Trigger Explorer

> Navigation Buttons in Screen Flow

> Convert Workflows to Flow (Beta)

> Flow Orchestrator GA

> Inline Edit Reports Update

   Multiple fields (Beta)

Read on →

## MFA

Starting February 1st, 2022, customers are contractually required to use multi-factor authentication (MFA) when accessing Salesforce products. To satisfy this requirement, you can turn on MFA directly in Salesforce or you can use your single sign-on (SSO) provider's MFA service. Salesforce MFA is available at no extra cost.

Requiring MFA is a logical choice to make sure company data is protected as good as possible. Some key takeaways are:

- Salesforce can not actually check if a company's SSO uses MFA but of course it's strongly recommended to do so, since SSO will give access to even more information than Salesforce alone.
- Integration users are not included in this requirement but we suggest to use a better mechanism than username / password for authentication
- Best practice for admins is to have an (additional) direct login to Salesforce with the Salesforce MFA in case of an issue with the companies' SSO

**The Spring release has some great new Flow improvements that bring business value to end users. Moreover, it can replace even more functionality currently handled by Apex Triggers. That means it requires less work to maintain.**

## Flow Trigger Explorer

How many times did you have to solve issues caused by several flows running on the same object and interfering with each other? The truth is that, although salesforce admins always try to follow the best practices, sometimes it is inevitable to have several flows running in your organisation on the same object. What Flow Trigger Explorer offers in the next release is a place where you can visualise all your record triggered flows. All you need to do is select an object and a trigger and you can see all the flows that run when a record for that object is created, updated, or deleted. Debugging is way easier this way!
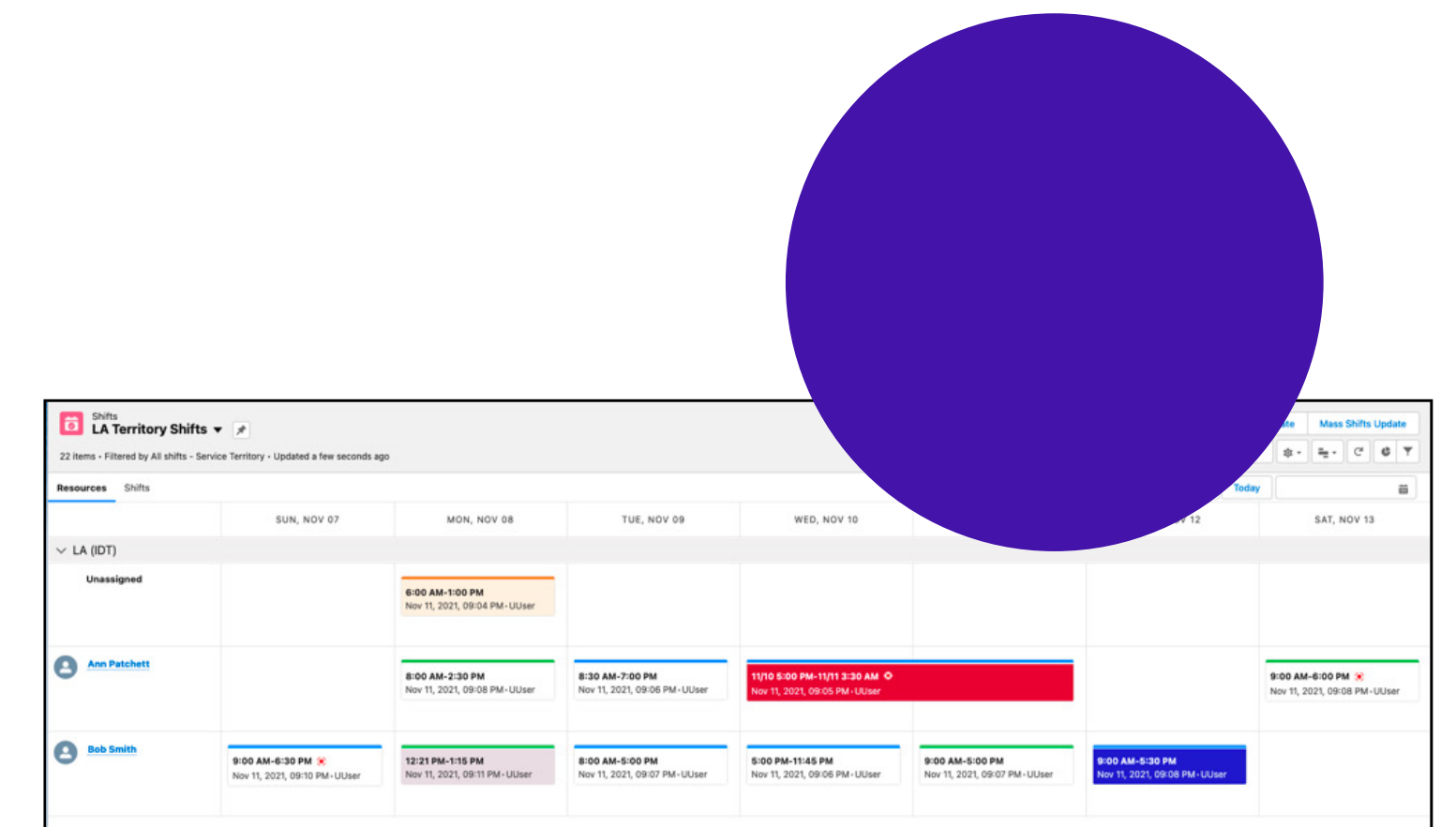
Read on →

## Navigation Buttons in Screen Flow

Did you ever have to create a screen flow where the standard "Previous", "Pause", "Next", and "Finish" button labels were just not enough? Well, you now can provide more meaningful guidance to your flow users by customising those labels as well as providing their translations in the Translation Workbench. This was already in beta during the previous release and is now generally available.
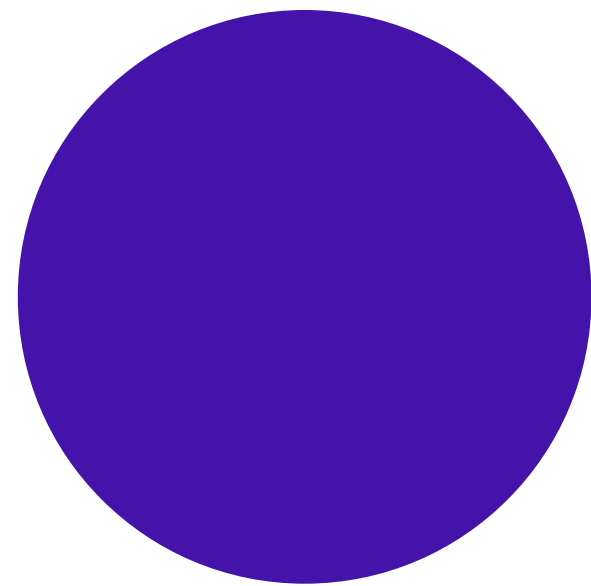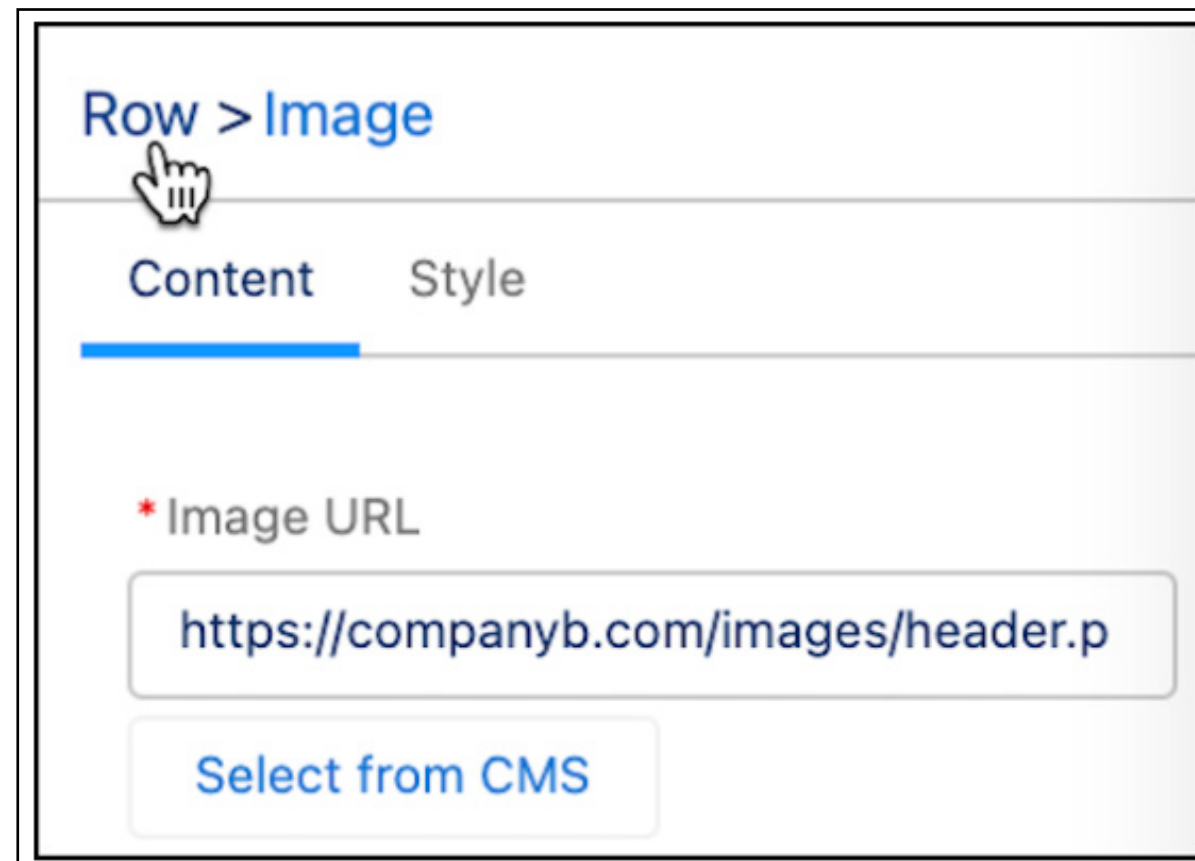
## Convert Workflows to Flow (Beta)

As you know, Salesforce will retire workflow rules at some point. Therefore it is recommended to move workflow rules to Flow. Flow offers a lot more functionalities and gives better control over the order in which actions get executed. Moreover, it helps admins to keep a better overview if automations are in less separate places.

With this release Salesforce offers a way to convert current workflows to Flows automatically, including advice on the best setting of Flow to use (e.g. before or after save).

This automation can save admins a lot of time and helps avoid mistakes! At the same time combining several flows on one object to support a certain business process can not be done by Salesforce. There are still plenty of challenges for the administrator responsible for automations.
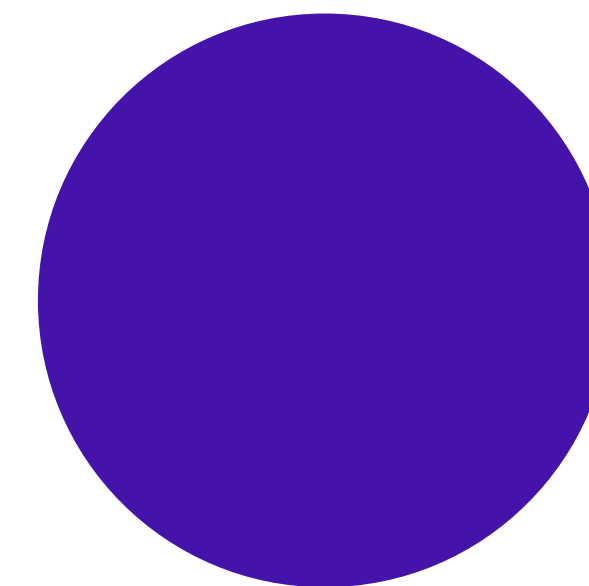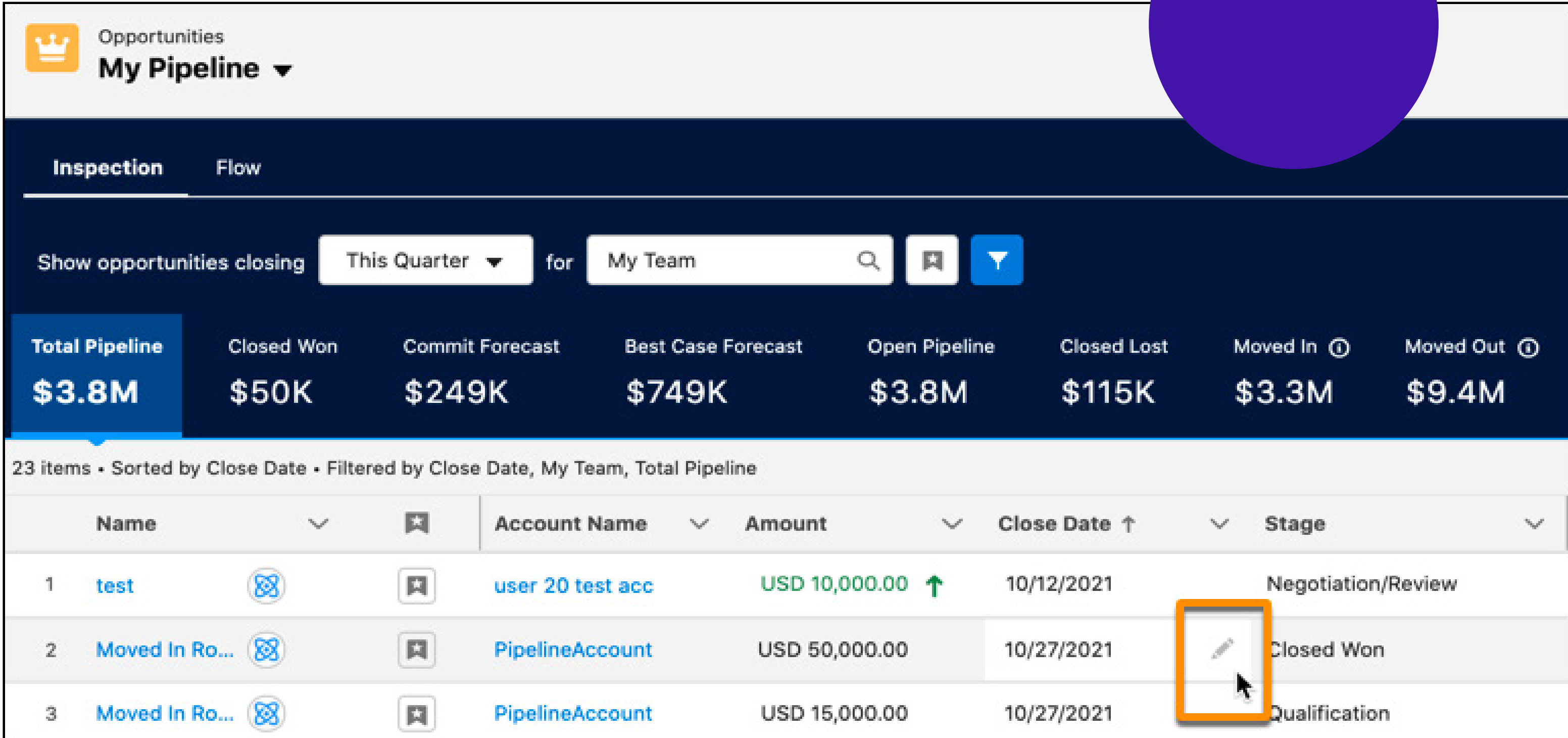
## Flow Orchestrator GA

In the Spring release, the Salesforce Orchestrator, which was already introduced (beta) in the previous release, is finally generally available and with new enhancements. You can build complex business processes involving different people in your organisation over multiple stages with multiple flows. You can also display the orchestrated work items to assignees on relevant record pages. With the new enhancements, you now can assign interactive steps to Groups or Queues and display and reassign work items with the use of Orchestrator Work Guide Lightning App Builder component. You can also view all the orchestration runs and their status, as well as cancelling a running orchestration, and if needed from the orchestration, run list views or trigger your orchestration through custom code.

Debugging is a lot easier, because you can now see all the in-progress and failed orchestrations in the Details pane on the canvas in Flow Builder.

Note that additional licences are required for this functionality.

## Inline Edit Reports Update Multiple fields (Beta)

In the past few releases functionality has been added to edit data directly in a report. When the source data for a report gets out of date, it's not necessary to go back to the original object record to update the information. With inline editing, certain types of text, numeric and checkbox fields can be updated without leaving the Report Run page. For example, Sales reps can run an opportunity report and review and update the opportunity amounts in one place without first opening the individual report or - even worse - exporting and importing data. In the Spring release it is possible to edit multiple records inline on the report run page at the same time.



**Briefcase Builder**

| 1 Create Briefcase | 2 Select Data | 3 Add Assignments | 4 Select Apps | 5 Activate Briefcase or Save for Later |
|---|---|---|---|---|
| Give briefcase a name and description | Specify records for offline viewing | Designate users and groups to receive offline data based on the contents of the briefcase | Select some applications to associate with your briefcase | Make briefcase available immediately or save and activate later |

**Read on** →

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**Tatiana Mashiliak**
Analytics
Consultant

**Rocco Maraschiello**
Analytics
Consultant

**Teun Gilissen**
Data & Analytics
Consultant

**Ralph Knoops**
Data & Analytics
Consultant

# Salesforce Data Hub

We are more than happy to announce the Salesforce Spring '22 Release Notes for the Salesforce Data Hub. This release contains many features that not only have the potential to improve your analytics solutions, but also focus on bringing this into your existing workflow in a better way. Read along to learn more about the most promising features for Tableau, Tableau CRM, Einstein Discovery, and Snowflake.

**Chapter topics**

> Tableau

> Tableau CRM

> Einstein Discovery

> Snowflake

Read on →

## Tableau

**Ask Data and Slack integration**
Last year, Tableau launched Tableau for Slack to get data-driven alerts, mentions and sharing activity in your workflow. As of this release, artificial intelligence (AI) will be part of the workflow too. Use @ask-data to ask questions using natural language without leaving Slack! You can search all your dashboard and all data sources directly in Slack and get clear answers visualized, ready to be shared with anyone. But this isn't everything! You can also use it to run AI powered predictive analytics on your data, using Einstein Discovery for Tableau.

**"Using Slack to get questions answered and visualized is a powerful tool in your workflow. There is no need to access separate dashboards to get those answers anymore. You can simply use Slack and share it directly with your colleagues, external partners or customers."**

Back to chapters

## Make your dashboard eye-catching with new Repeater Widgets

With the latest release, Tableau CRM got a new type of widget - the Repeater Widget - that has a lot of advantages. It looks attractive in the dashboard, is user-friendly and can save significant development time. The widget can be created in several clicks by grouping your data and projecting the required charts and metrics just one time. Once you're finished, you're able to see the whole picture in one glance per group whilst scrolling through the list.

For instance, if you would like to project revenue per industry and location, there is no need to create separate widgets anymore. The repeater widget creates a scrolling list. In this way any type of group can be viewed and compared such as sales teams or products categories.

## Resize Table Columns and Wrap Text to Fit Content

Say goodbye to limited column resizing options in explorer and dashboard tables! You can now adjust a column width by dragging its right border. Make use of text wrapping for column headers and cells to make scanning table content even easier! The text wrapping option for cells replaces the Number of Lines per Row menu in the table properties panel.

To resize a column, hover over the column header's right edge for the resize cursor to appear. Drag the column border until the content fits how you like it. Keep in mind that if you resize columns in an explorer lens or a dashboard in edit mode, you can save your changes. However, changes made in the dashboard view or preview mode aren't preserved. To control text flow, enable Wrap text in the Header and Cell sections of the table properties panel. Text wrapping is enabled by default for new tables.

"Repeater widgets have so much potential for the analytics dashboards when users want to explore the leaderboard, compare locations between each other or just view all important KPIs in one glance for the group they are interested in."

Read on →

## Change ownership of the record directly in Tableau CRM

One of the most powerful features of Tableau CRM is the ability to take actions directly from the dashboards. Within the new release we got a new functionality of the actions - changing ownership of Account or Opportunity records. It's a great improvement that helps reorganize the sales team without leaving your favorite TCRM dashboard.

**"It's great to see how Tableau CRM actions improve each release! These new features improve TCRM adoption and decrease time spent on administration tasks."**

## Einstein Discovery

### Improve Dataset Distributions with Class Weights

In many Einstein Discovery use cases, you try to predict a so-called binary outcome. These are yes/no questions with either a true or false outcome. For instance, you want to understand whether a lead is likely to convert, an opportunity will be won, or whether a customer is going to churn. In many of these use cases, you will find one of the two possible outcomes to be overrepresented. Let's say you want to predict customer churn. Your training set consists of 1000 rows out of which 48 churned and 952 didn't churn. This results in an imbalanced dataset which cannot be used to generate a reliable story.
With the Improve Dataset Distributions with Class Weights feature, it is now possible to create more balanced input for your story in Einstein Discovery itself! You can find fields with an imbalance distribution in the Story Settings. If you select the field, its distribution is shown. Here you can choose what action you want

to take in this field. You can decide to ignore the alert, or to apply class weights. Select Apply class weights to start the process of undersampling and oversampling in the background. Update your story to save your changes. You now have a more balanced and accurate representation of your data and an improved model accuracy.
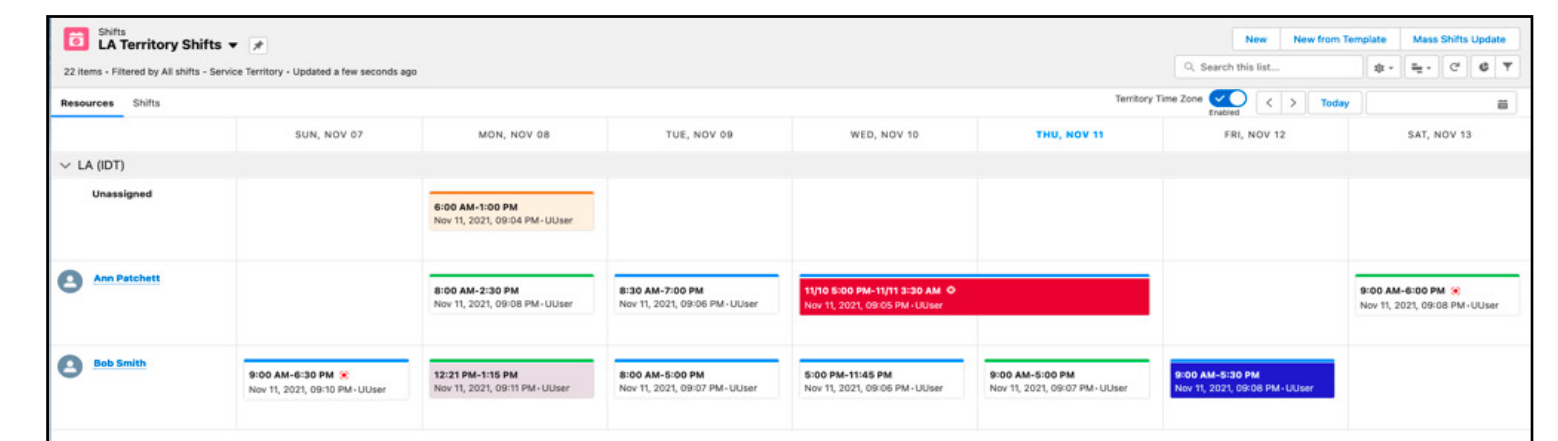


**"It is very common for a binary field to be imbalanced. However, most of the time we cannot change this in the real world. With Einstein Discovery we can deal with this issue within the Salesforce ecosystem. Clicks only, no coding skills required!"**

Read on →

## Snowflake

One of Snowflake's unique features is the Snowflake Data Marketplace. This feature already exists for a while but we would like to highlight its capabilities and possibilities once again. Because we think this is really something you can benefit: you can use it for creating faster insights, which results in making better decisions.

### Snowflake Data Marketplace

Adding third party data to your own datasets can really help in getting new insights and make better decisions. For instance, you can add third-party Financial Account data via the Snowflake Marketplace. Adding this data to Salesforce can enrich your Customer360 and can be highly valuable in improving risk assessment. Snowflake is investing heavily in adding new datasets to the Marketplace. Every month new datasets are released.
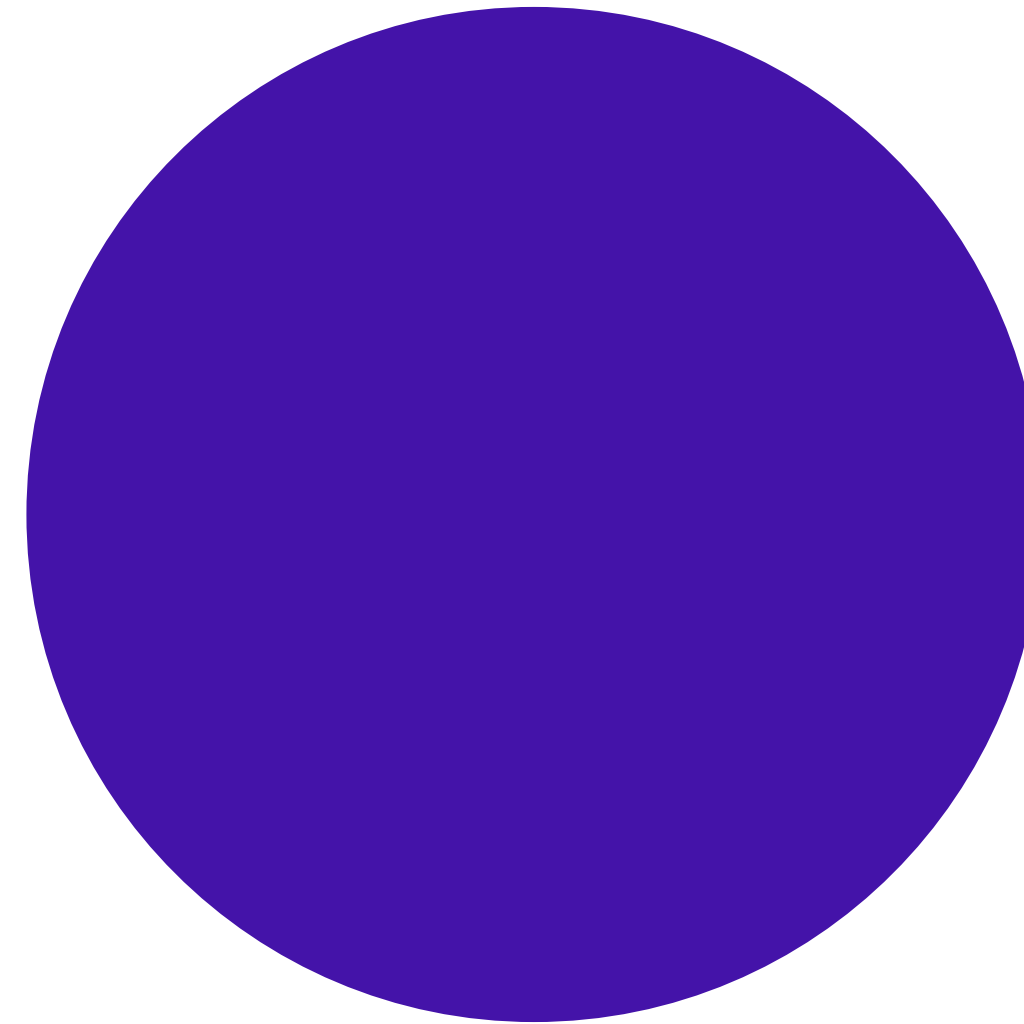
Incorporating data from the Snowflake Marketplace into your Snowflake datasets is very easy.
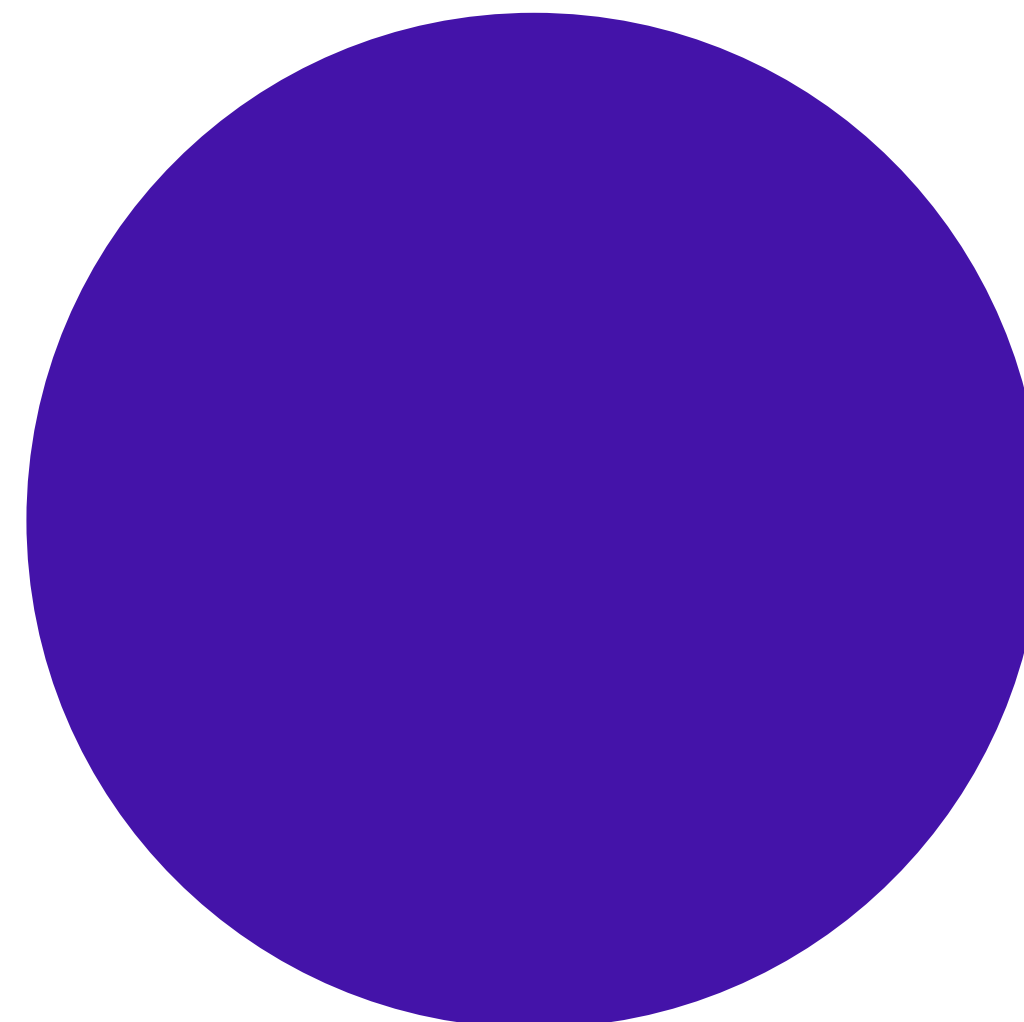
"Using data via the Snowflake Data Marketplace is a real game changer for your business. It's hasslefree. The data is easy to maintain, quick to acquire and it delivers new insights very fast."

Read on →

# Financial Services Cloud

**Chara Paschalidi**
Senior Salesforce
Consultant

**Gelske Blok**
Salesforce
Consultant
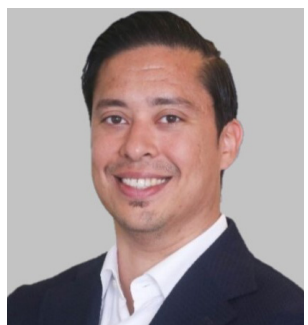
**Iskander Egberts**
Salesforce
Consultant

**Nikolaj Kiepe**
Industry Lead
Financial Services

**The Spring release of Financial Services Cloud brings a host of new functionalities to help Financial Services providers in a time where continuous technological innovation has become the norm to remain relevant. Features such as Interest Tags or Record Alerts provide improved ways to develop relationships with clients by tracking their interests and notifying them when critical changes require action. Most notable in this release is the Financial Deal Parties component that helps you track relevant details surrounding a financial deal. We will highlight these features in further detail together with a selection of other enhancements that are introduced in this release.**

## Chapter topics

> Interaction Summaries

> Interest Tags

> Financial Deal Management

> Record Alerts

> Residential Loan Application
  Access

Read on →

Back to chapters

## Interaction Summaries

Interaction Summaries is a feature that allows you to capture notes in a structured way. In the Spring release the new Account Interactions component is extended not only to the Account, Financial Deal and Opportunity object but also to any object record page, including custom objects. What is more, you can get a better insight on the key contacts of an Account, the users they interacted with, the past account interactions and the total number of interactions. When you select a contact (1) on the component, as shown in the picture below, you can see details about interactions with that contact, as well as the users interacting with this contact on the Interacting Users tab (2). You also have the option to override user's access privileges so that everybody can see the total number of interactions and all interacting users in the component.
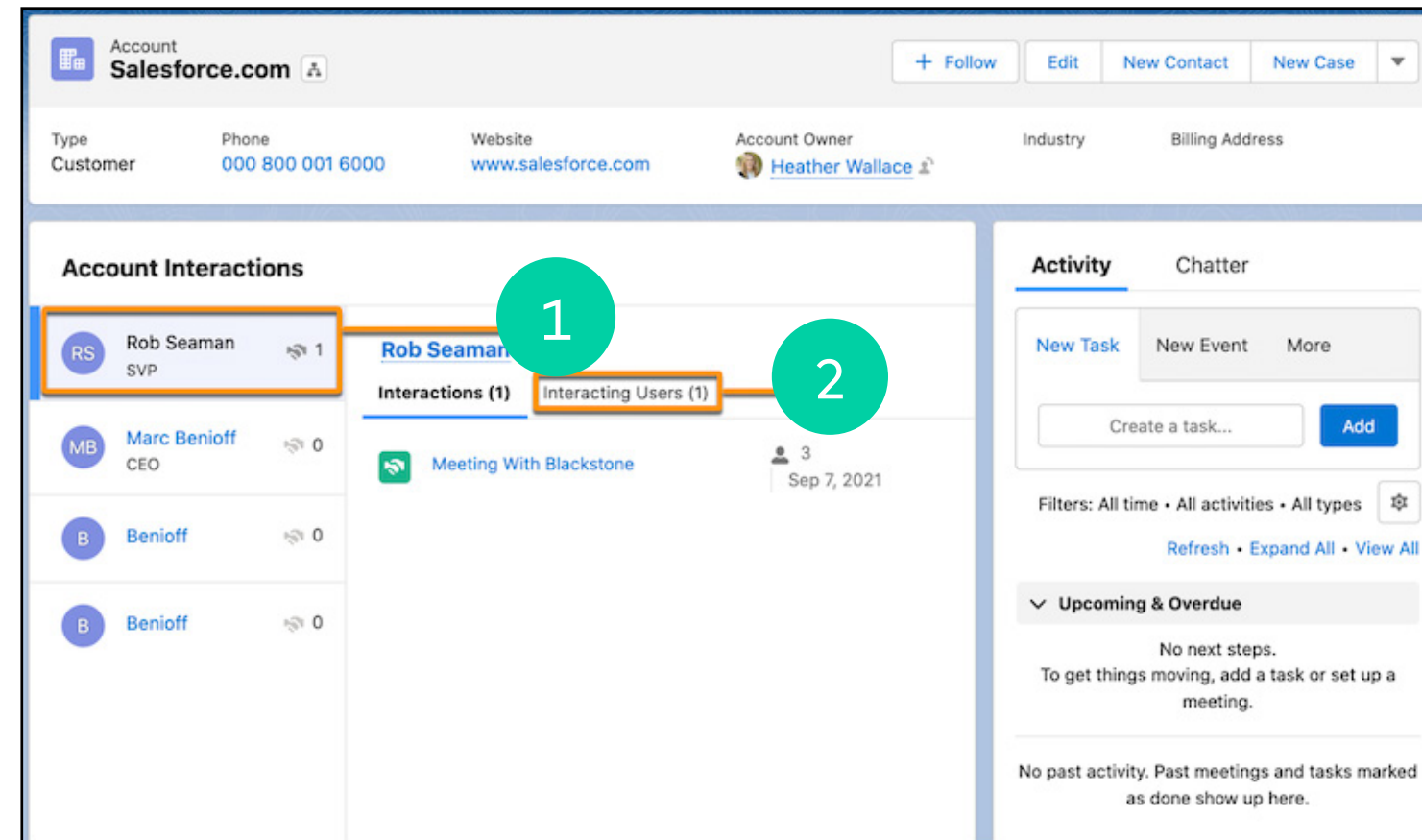


## Interest Tags

You can now add tags about your clients' interests in order to help your users achieve more personalized conversations and build deeper relationships with their clients. All you need to do is to turn on Topics for the objects you want to add Interest Tags to and select the objects that you want to show the Interest Tag component on.
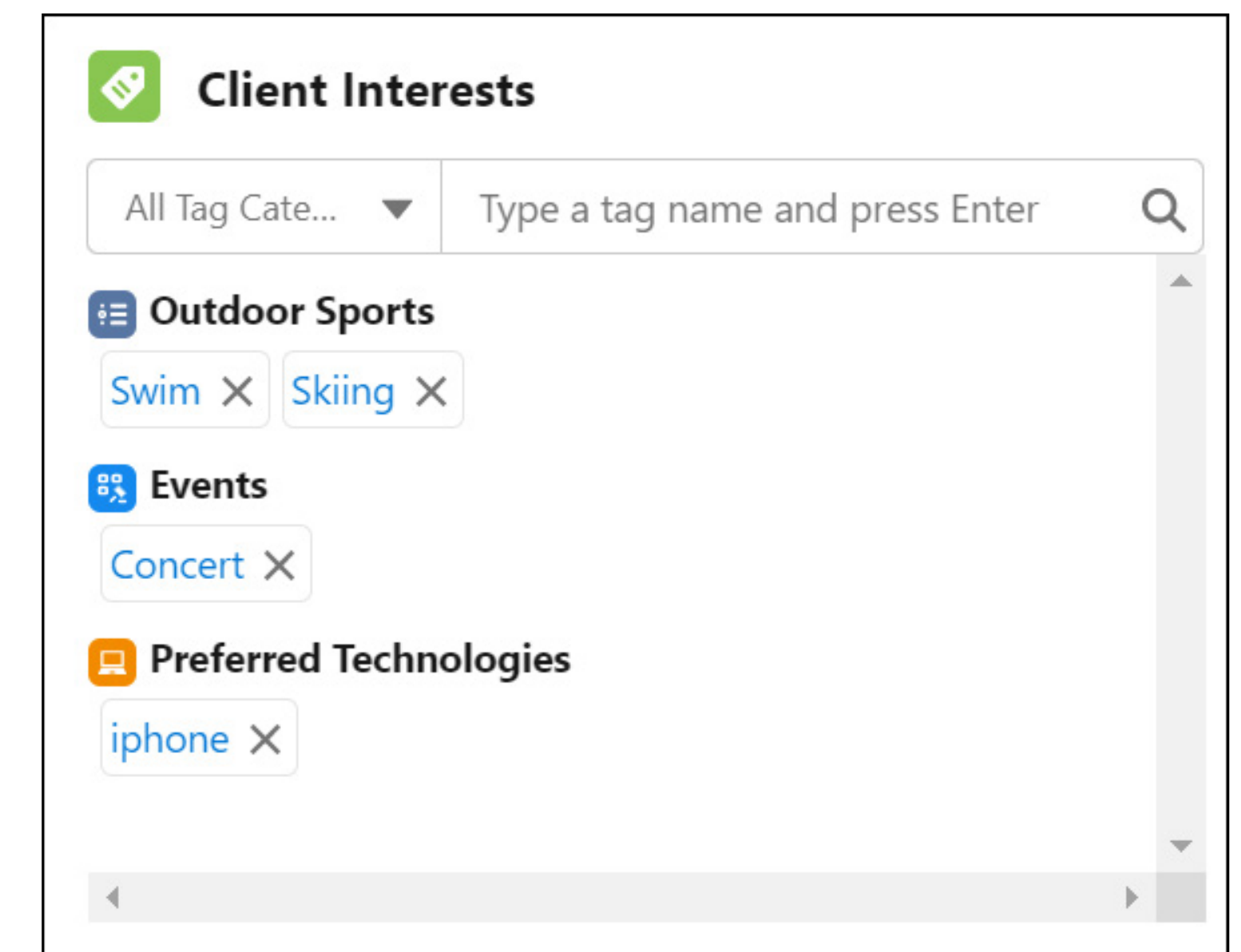
"Understanding their clients is paramount for Financial Services providers to remain their relevance and the features introduced in the Spring release show that Financial Services Cloud continuously expands its ability to help them doing so."

## Financial Deal Management



The most interesting enhancement of the Sprint '22 release in Financial Services Cloud is the new Financial Deal Parties component. You can now help your users track more details about bids and assets of a financial deal such as date, amount and round of a bid or type of an asset. In addition, they can also see who is involved in the financial deal, the roles, the parties, and other interaction details. You can achieve that by adding the Financial Deal Bids and Financial Assets related list to the Financial Deal record.

## Record Alerts
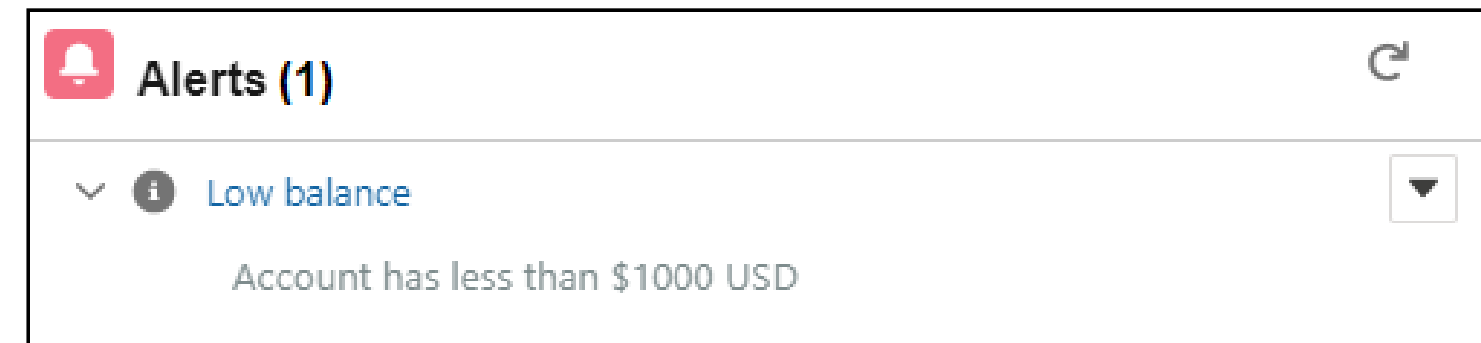


Stay on top of your game with Record Alerts. These will alert your Relationship Managers or your Contact Center Agents when changes in client records require action. For example, if an agent sees a low balance alert on the financial account that funds direct withdrawals, the agent can notify the client to transfer funds and avoid overdrafts. Record Alerts will help you to stay on top of your client servicing and will allow you to proactively take actions or reach out to your client - something your clients will certainly appreciate!

## Residential Loan Application Access

Whether your users can access and edit Residential Loan Applications is usually tied to their access to the Account object. However, sometimes you might want to allow only certain groups, like Relationship Managers, to edit accounts, but want Loan Officers or others working on Residential Loan Applications to be able to edit applications. You can now open up edit access to Residential Loan Applications for users with read-only access to Accounts! Just go to Mortgage Settings in the Setup to enable this.

**Actions Plans: More standard fields, printable view, sharing of templates, filter by status**
For those of you who are using Action Plans to coordinate repetitive tasks such as customer onboarding and KYC/CDD automations there's more possible out of the box! There are 8 new standard and customizable fields possible which is a lot more then the standard few that were

Read on →

allowed at the beginning of 2021. Sharing, changing owens, filtering and cleaning templates is also made a lot easier!
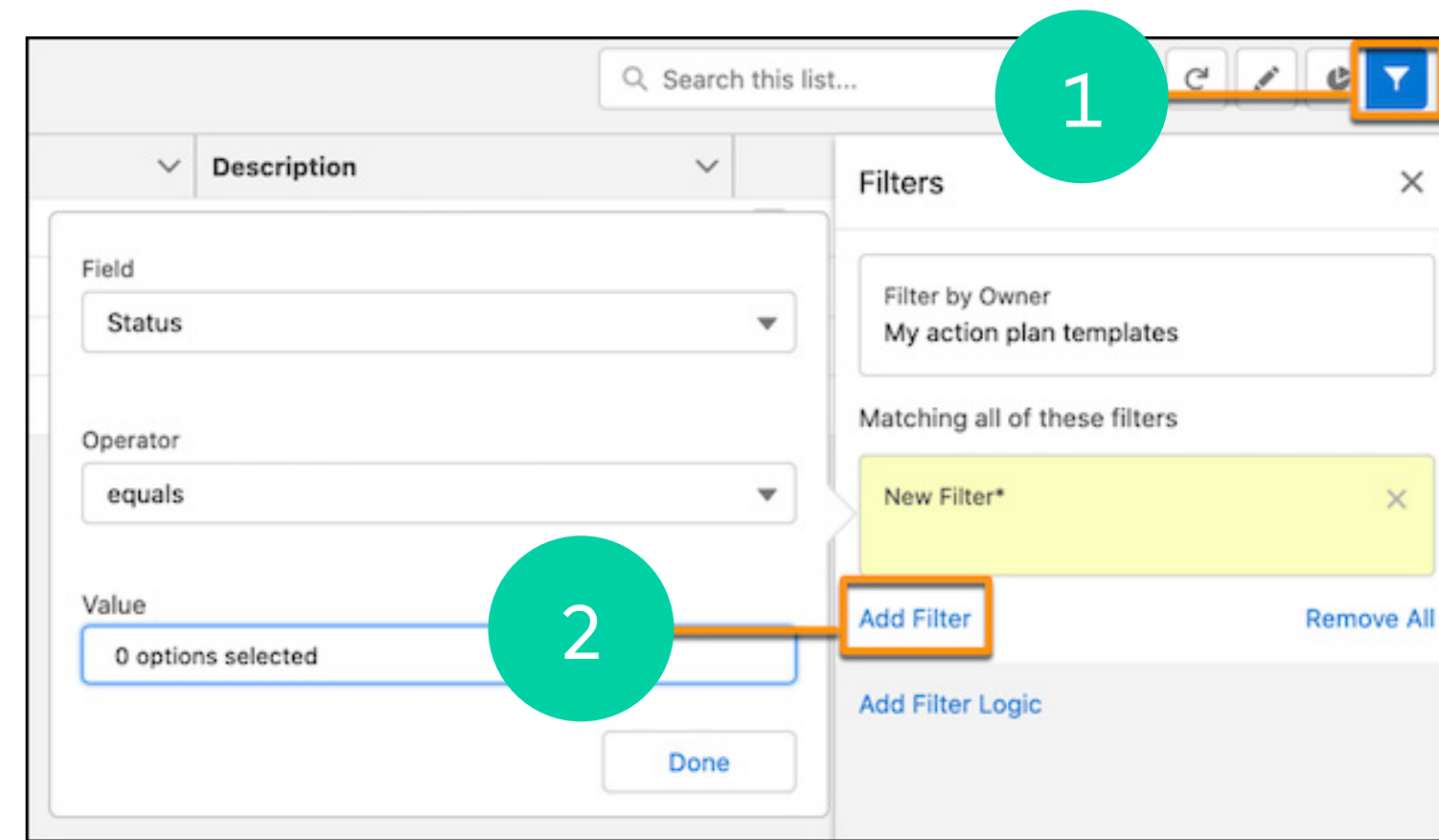


## Specific for Insurance: Improve your Combined Ratio's with Enhanced Claims and Policy Analytics app!

With the Insurance Claims and Policy Analytics app you get actionable insights that help you effectively manage claims and policies, ensure customer satisfaction, and grow your business. Analyze your team's current and historical performance to better manage workloads and improve team performance. Track product performance based on key metrics for policies, quotes, and commissions. This is part of Tableau CRM Analytics studio and shows the real power of an integrated Salesforce Platform strategy paying off!



## Time saver!: Update Data Processing Engine Definitions with Ease!

When you update source object nodes or remove fields in a definition, you're notified about the dependent nodes where the objects and fields are referenced. You can navigate along the reference path for each dependent node, and then remove the required references. Previously, you had to manually look through each node to find and remove a reference.
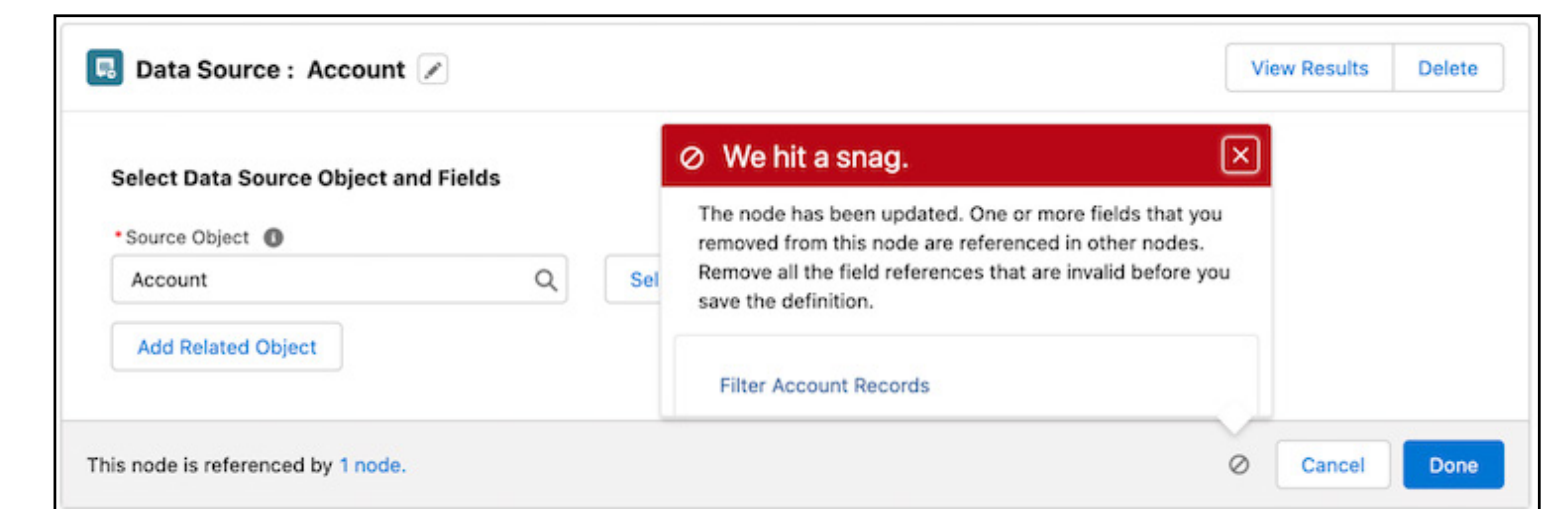


Read on →

**Tatiana Mashliak**
Domain Lead
Data & Analytics
in Manufacturing

**Paul van Alst**
Domain Lead
Marketing & Sales
in Manufacturing

**Frank Visser**
Domain Lead
(Field) Service in
Manufacturing

**Ernst Jan de Waardt**
Domain Lead
Salesforce Platform
in Manufacturing

**Dico Timmermann**
Industry Lead of
Manufacturing

# Manufacturing

With the continued verticalization and focus on Industries by Salesforce, Nextview is dedicating a part of the Release papers specifically to Industries. This chapter is about one of the focus Industries within Nextview, Manufacturing.

Where in previous Release Papers this chapter was about Salesforce Manufacturing Cloud, it is now extended to all the relevant parts of the Salesforce Products for Marketing (Pardot), Sales (B2B Commerce, CPQ), Service (SFS, Service Cloud), Data & Analytics (Tableau CRM) and Platform & Mulesoft.

In this chapter you will find some interesting features of the Spring release for Manufacturing, for example in Field Service around Shift Management and in Tableau CRM around handling missing data using Einstein Discovery. Although not part of the Spring release, the announcement and GA of Manufacturing Cloud Service is a major one. In the next Release Paper we will also provide insights in the features and functions of this great new addition to the Manufacturing cloud suite of products.

Read on →

# Marketing & Sales

### Data restrictions regarding Salesforce CPQ

If you are working with Salesforce CPQ, be aware that Salesforce brings security to the next level. In 2021 new objects and field permissions were introduced. Users have two ways to access these new permissions: via the standard permissions or the custom ones.

With the Spring release the new requirements are enforced by Salesforce. If you are not ready, you can request help

### Performance Improvements via new technologies

The new Web Components V1 technology will be improved again and boost performance at Lightning Experience, Salesforce Classic and the Salesforce mobile app. We recommend to check features mentioned in the help file mentioned below: via Salesforce CPQ Support.

"The browser improvements built with the V1 technology have strong effect on the configurator and calculator features which make the daily work smoother."

"The Spring release contains new features within Field Service Lightning that will support users within the manufacturing industry in their daily operations. Shift planning has never been so easy."

# Field Service Lightning

### Save Time with Mass Shift Updates

As a shift manager you can now update shifts in bulk with just a few clicks. Simply create a background task that assigns agents, updates shift statuses or does both in a batch of shifts.
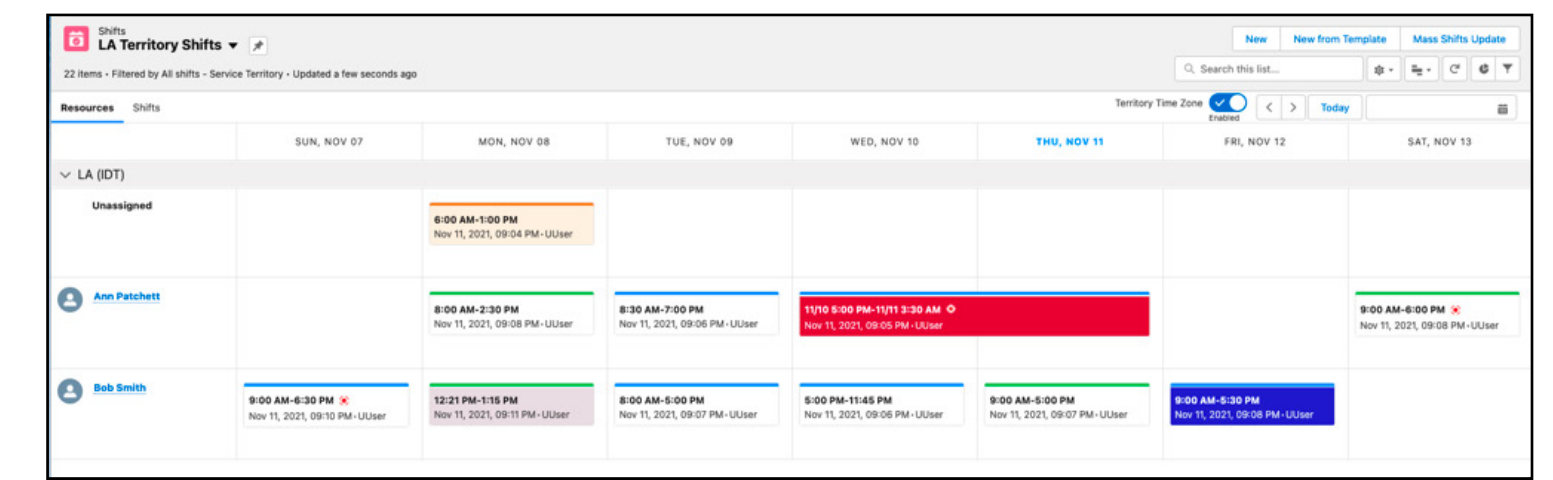


### Differentiate Shifts using Colors

When creating shifts you can now assign background colors to represent different shift types. As a shift manager you can now also add background colors to shift templates. Color-coded shifts are created in a snap! The newly created background colors will appear in the shift calendar and the dispatcher console Gantt.

Read on →

## Briefcase Builder for Field Service Mobile (Beta)

The new Briefcase Builder tool helps you select and share records offline with mobile workers (Salesforce Field Service mobile app for iOS and Android). As an admin you can configure briefcases with the most relevant data for your mobile workforce.
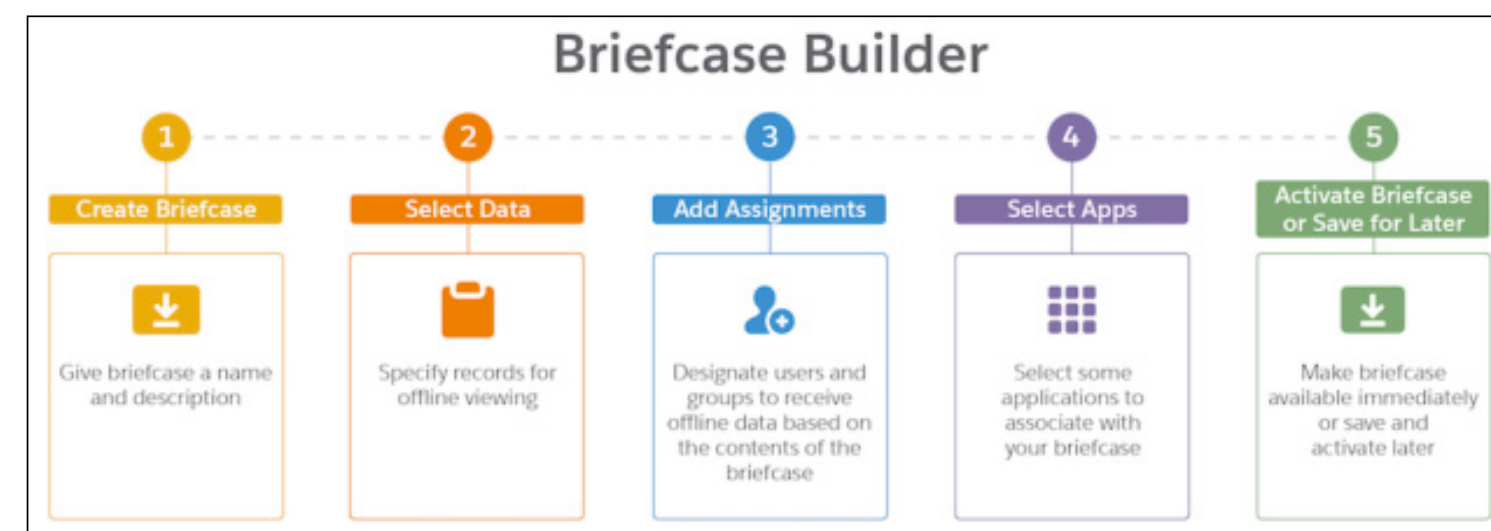


**"New release gives users of Tableau CRM advanced customization that are frequently manufacturing specific. Also, Einstein Discovery again is improving story setup allowing you to predict sales even more accurately."**

# Tableau CRM

### Lightning pages in Tableau CRM dashboard

Tableau CRM users in the Manufacturing industry often use more than one data visualization tool to explore data and make analyses. Now TCRM dashboard can be enriched with custom Lightning Page Components such as chart or widget, or even Tableau visualization. That means all the required information is projected directly in one dashboard and creates a connection between TCRM data and custom extensions.
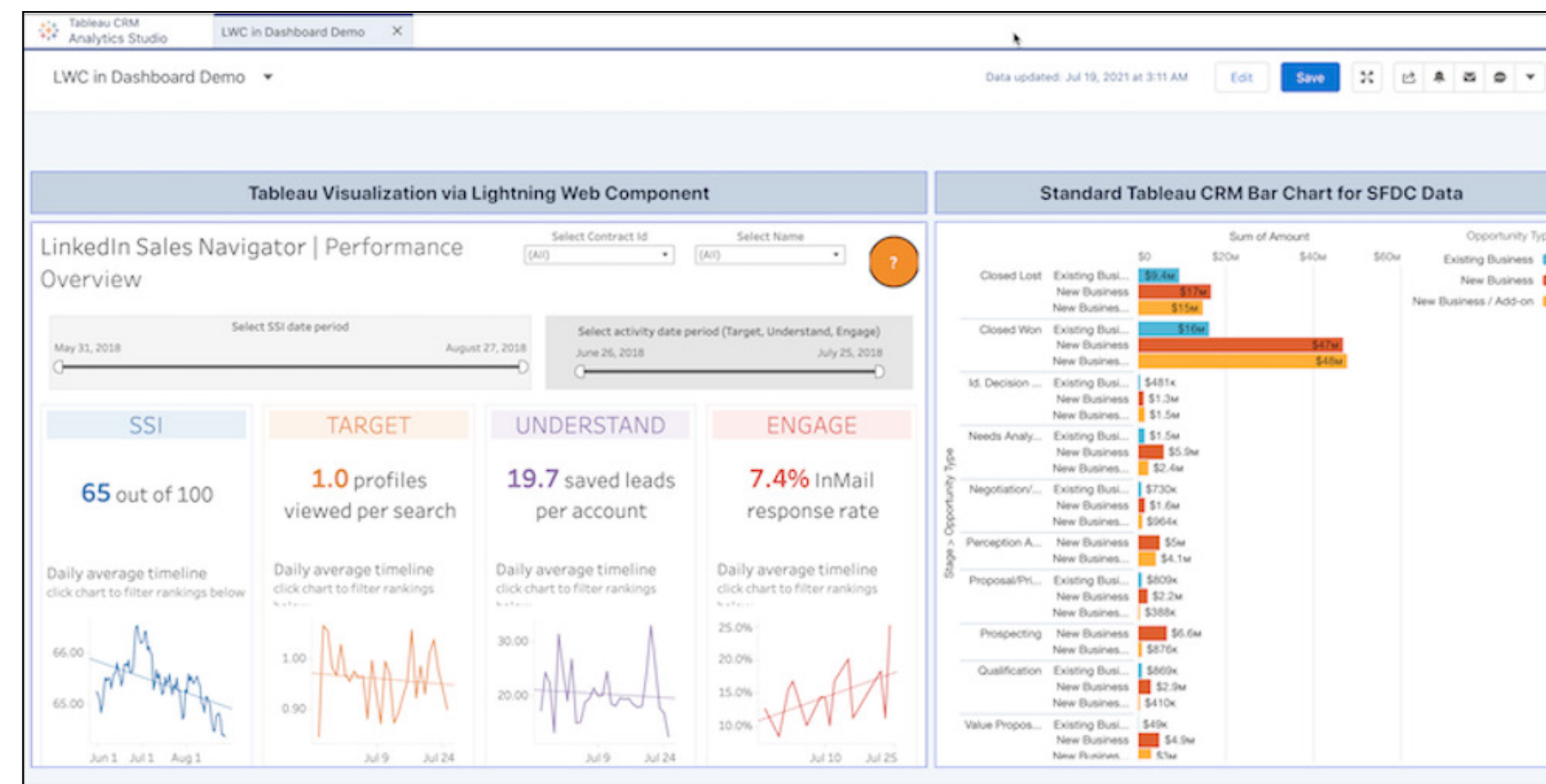


### Handling missing data in Einstein Discovery (pilot)

Improving data quality is one of the most challenging processes in every company. Each manufacturing organization relies on their forecast but missing data can ruin prediction models. As a pilot, missing data can be predicted directly in Einstein Discovery story setup by using available values. This way the accuracy of the prediction model can be improved. We are looking forward to this feature to become generally available!

# Platform & Mulesoft

**More fields in Actions Plans**

An action plan template defines the tasks and other items needed to complete a business process. In a template each task is given a priority, the number of days in which it must be completed (date offset), and who is responsible.

When creating new tasks for action plan templates, you now can include up to eight more standard and custom fields. Previously, only a few standard fields were allowed, such as subject, priority, days, and comments. More fields gives the possibility to provide more context on what needs to be done to complete a task and possibly less manual work for end-users.

**Improvements on the Data Processing Engine**

The Data Processing Engine helps you extract and transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using Data
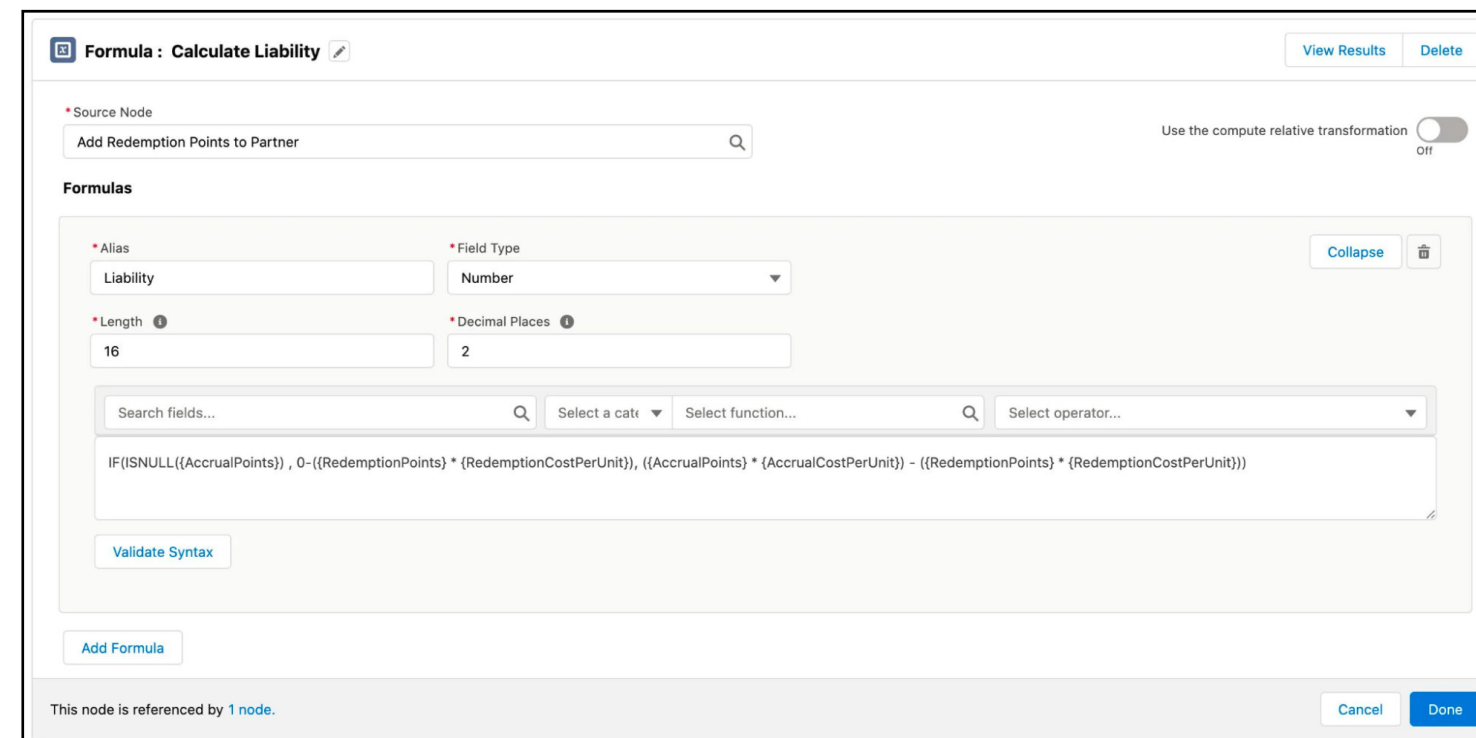
Processing Engine definitions. Data Processing Engine leverages functionality previously only available to feed Tableau CRM.

Using it to load back data in Salesforce or to other systems like Snowflake provides powerful functionality that would otherwise require a separate ETL solution or Batch Apex. The Spring release contains a number of enhancements including the Sum function in a formula to calculate the sum of the values that are stored in a field across the rows of a partition. Delete Data Processing Engine defines runs that you no longer require.

Read on →

Back to chapters

# Sales Cloud

**Better performing experiences**
The Winter release optimized your site performance on different levels. The self registration process for high traffic sites has significantly improved for organizations using account role optimization. This process is now 10 times faster. Salesforce has also rolled out a pilot for high traffic sites to bulk-process self registration instead of processing requests one at a time, which will fasten this process even further in the future.

In addition, all Salesforce orgs that use enhanced domains now get the Content Delivery Network (CDN) for Digital Experiences to guarantee top-level performance on peak traffic levels. All in all, a great focus on improving performance to meet the demands of your business during peak times.

**"The new Sales Cloud features make selling products and services easier and faster. They help companies keep track of their performances and strategically improve weak areas if needed."**

**Read on** →

Back to chapters

# Manufacturing Cloud

### Accurate Forecasts

Gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Accounts' Health dashboard to monitor your accounts' performance based on key metrics for revenue and quantity and take measures to improve your accounts' health. Use the Account Insights dashboard to track your accounts' performance based on various standard and custom dimensions, analyze the forecast composition and identify accounts and products that need attention.

### Extended Account Forecasts

Create measure groups so that your users can view account forecasts with specific measures, such as quantity or revenue. In the forecast grid users see forecasts for measures that are part of the selected measure group.

### Boost Partner Collaboration on Forecasts

With the enhanced Manufacturing Experience Cloud site template, your customers and partners can view and update the forecast details for their accounts and detailed forecasts for each account that they have access to.

**"Gain visibility into your forecast data and develop accurate forecasts to optimize your production and operations. Use the Accounts' Health dashboard to monitor your accounts' performance based on key metrics for revenue and quantity and take measures to improve your accounts' health."**

Read on →

**Lowie te Riele**
Managing
Consultant Service
Cloud

**Gelske Blok**
Consultant Service
Cloud

**Paula de Amicis**
Consultant Service
Cloud

# Service Cloud

With the release of Spring '22 Salesforce introduces some great new functionalities that improve the customer's experience. A few topics really jump out in creating more customer efficiency when working with Salesforce. It is now possible to add an integrated Path to your incident management process to support your staff with clear steps in solving an incident. Improved Staff Scheduling now has a longer reach in creating capacity plans (up to 52 weeks!). Einstein Bot Building got rid of the Bot Builder and now introduces the Conversation Canvas to effectively visualise your bots conversation design. Salesforce Knowledge is improved: the article link will always point to the latest published version.

## Chapter topics

> Incident Management -
  Fix Incidents Faster with
  Integrated Paths to Resolution
> Improved Staff Scheduling
> Improved Einstein Bots
> Improved Knowledge Article
  (Sharing)

Read on →

"This is yet another multifaceted release for Salesforce Service Cloud with fancy new features and long-desired improvements on existing functionality and user experience. Developers and end users will be happy with everything that the Spring release has in store to make their lives easier."

**Gelske Blok**

## Incident Management - Fix Incidents Faster with Integrated Paths to Resolution

In the previous release we talked about linking customer cases to internal cases. In this release it is now possible to add Integrated Paths to resolve your incidents even quicker! You can now add work plans and steps for your colleagues to see which steps are needed to resolve an incident. Besides that, agents can see where in the Path an incident is to be fixed. This helps your internal colleagues to easily resolve an incident but also to see which steps have already been taken if you want to inform your customer about it.

## Improved Staff Scheduling

Staffing and long-term capacity plans can now be projected up to 52 weeks in Workforce Engagement. This functionality will allow you to easily predict staffing requirements for a longer period. It's convenient for helping your business meet customer service level agreements.
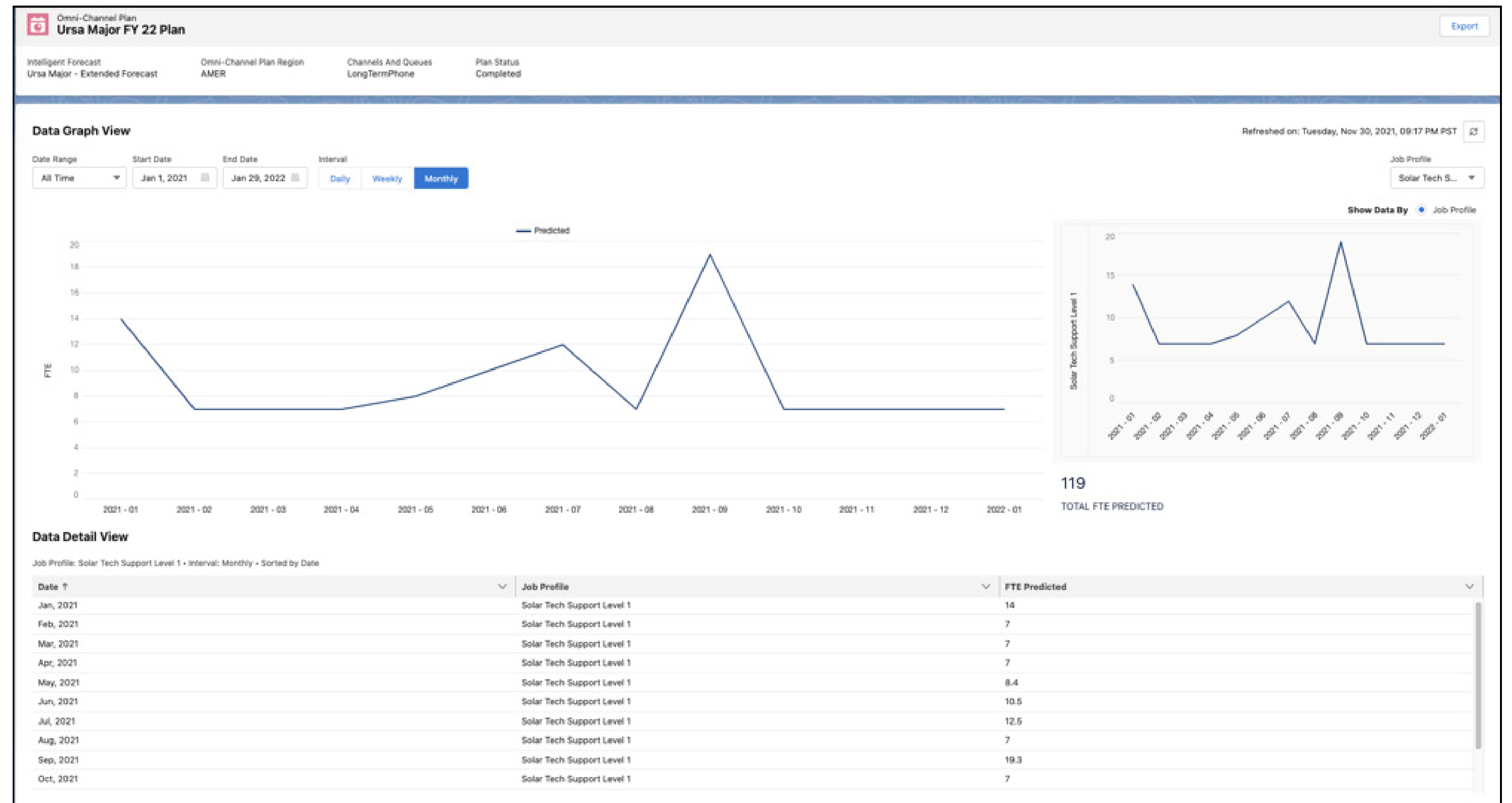
## Improved Einstein Bots

Einstein Bot building just got easier: goodbye Bot Builder, hello Conversation Canvas! The Canvas helps you visualise and streamline your bots' conversation design while suggesting new and useful features. Multiple Language Einstein Bots allow you to use one and the same bot to support your customers in English, Dutch, German or any other language. You can use a new set of Standard Reports to analyse how your chatbots are performing. Get insight easily and quickly into your Engaged Sessions (a session where your customer sends at least one message to your bot or performs an action) or your Escalations (any transfer by the bot or the customer away from the chat).

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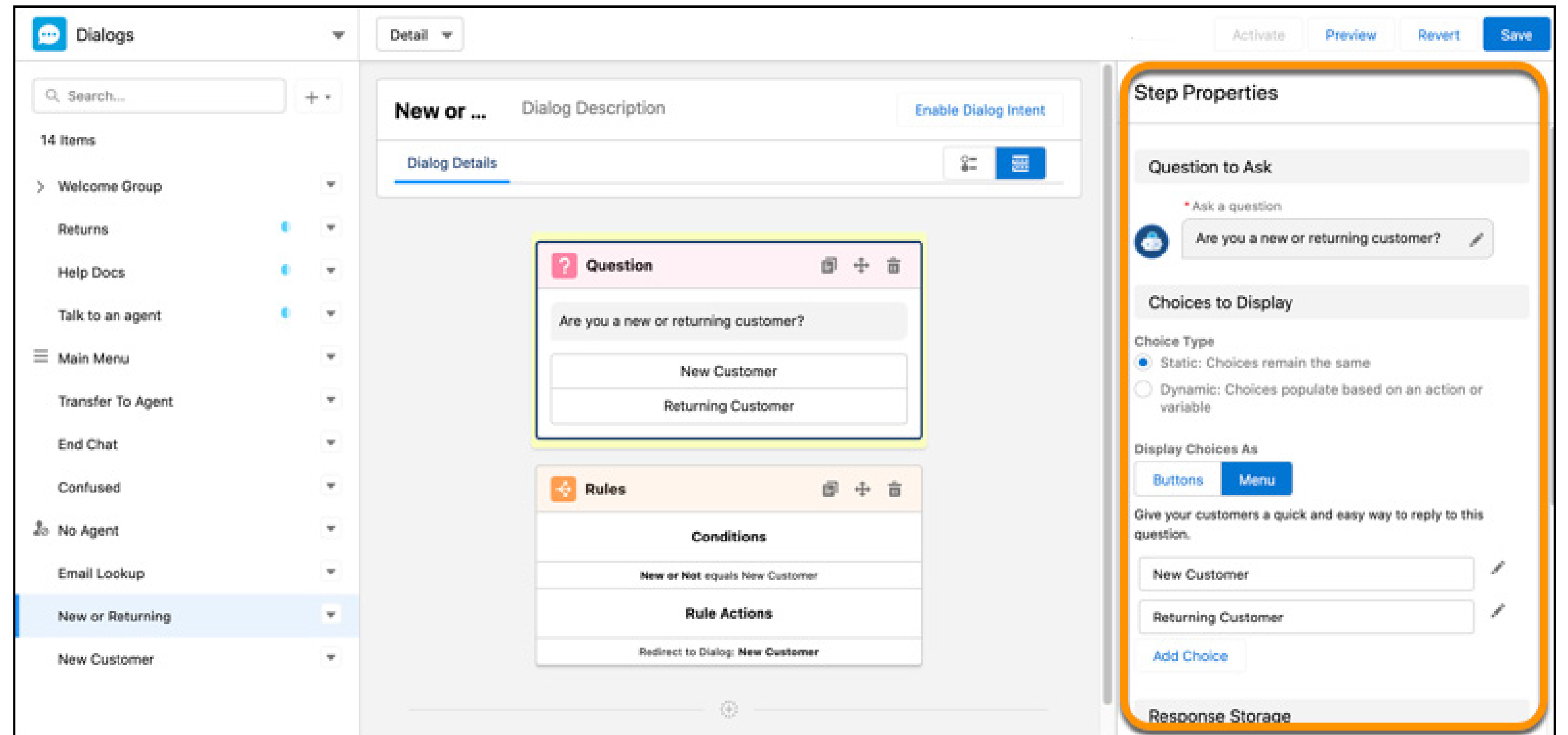
## Improved Knowledge Article (Sharing)

You can now share a Knowledge Article without worrying about the article version number. The Article Link will always point to the latest published version, even if you update the knowledge article after creating the link. So rest assured: your colleagues or customers will refer to the latest relevant information whenever needed.

Images in Knowledge Articles are now available in full size without a hassle. Just click any image and see its details in an expanded view. Using Knowledge Articles just got a lot more efficient!

**Jefrey Schmidt**
Senior Consultant
Field Service

# Field Service

**Organisations, customers and their assets are getting smarter and so is Salesforce Field Service with this new release. Spring '22 brings the following two functionalities that are really helpful to our customers: Visual Remote Assistant and Preventive Maintenance Plans based on asset use or conditions. With Virtual Remote Assistant you can now deliver remote service to your customers from everywhere, saving time and possibly preventing follow-up visits. Preventive Maintenance Plans can now be based on asset use or conditions instead of fixed time intervals.**

## Chapter topics

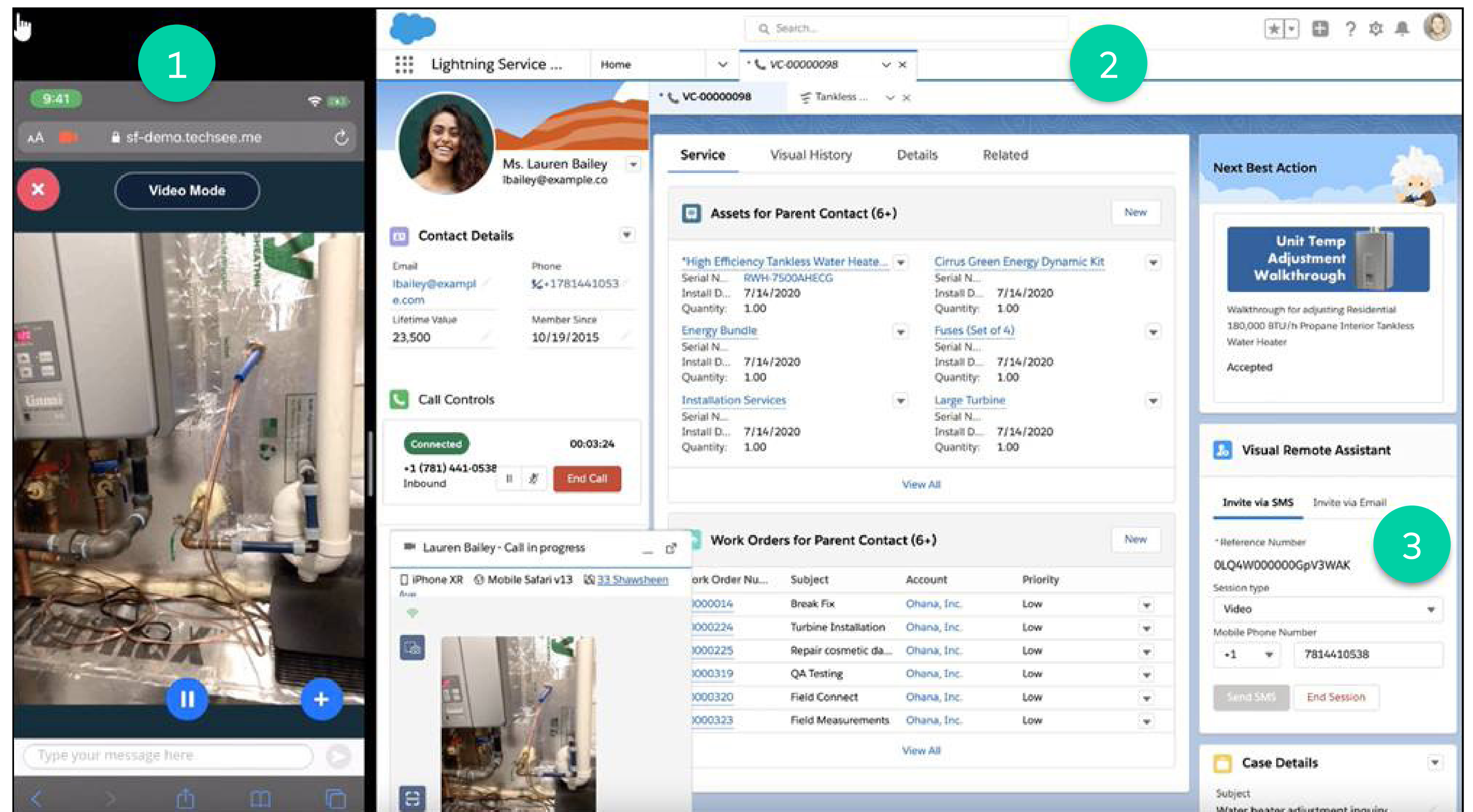> Virtual Remote Assistant

> Preventive Maintenance Plans

Read on →

"Times are changing: we are getting used to remote working and therefore more devices are connected to the cloud. Salesforce Field Service is responding smartly to that development."

## Virtual Remote Assistant

With Virtual Remote Assistant (VRA) you can provide visual customer assistance remotely, making customer service or support safer and easier for both your employees and customers.

You can now easily set up a video session so your agent or technician can see what the customer sees on their smart device. This way you can guide the customer using Augmented Reality by providing on-screen information or take pictures of the asset for future reference. Save time by asking targeted questions or prevent a service visit by guiding the customers in resolving the issue themselves.



1   See what the customer sees during the VRA session
2   The agent or technician sees the customer and related information like asset data
3   The Visual Remote Assistance pane is where the agent or technician starts an VRA session

Read on →

## Preventive Maintenance Plans

Prevent unscheduled downtime and increase asset reliability with Preventive Maintenance Plans based on asset usage or conditions.

Chances are you already heard of Preventive Maintenance Plans. But where you previously created work orders and service appointments based on fixed time intervals, you can now create plans based on asset data. You can use any criteria to proactively prevent downtime. For example: automatically create a service visit when an asset exceeds a certain temperature threshold. How? Select the Maintenance Work Rule as Source Object and choose Asset for Filtered Object. Then specify the threshold criteria and save the filter criteria to be used in the plan.

New Recordset Filter Criteria

Map a source and filtered object. Create filters for the source object based on field values in the filtered object. **Tell Me More**

* Recordset Filter Criteria Name

Temperature exceeds 100 C

Description

* Source Object

Maintenance Work Rule

* Filtered Object

Asset

☑ Active

**Conditions**

The filter criteria is valid when...

Logical Operator

All Conditions Are Met

* Criteria Field ⓘ

Temperature C

* Operator

Greater Than

* Value

100

+ Add Condition

# Experience Cloud

**Thomas Renkers**
Managing
Salesforce
Consultant

**Ignace Kozica**
Senior Salesforce
Consultant

**Mille Bonekamp**
Consultant
Experience Cloud

With the Spring '22 release Salesforce Experience Cloud receives important updates to security, performance and maintenance features. Additionally, there are a number of technical updates and upgrades that enable our developers to create more exciting functionality more quickly!

**Chapter topics**

> Improved security for public sites

> Increased performance

> Easier maintenance

Read on →

"Salesforce has once again done what they do best; improve the user experience for both end users and builders. With this release Salesforce allows you to make your Experience Cloud Sites cleaner, safer and smoother."

Back to chapters

## Improved security for public sites

Salesforce has further increased the granularity with which you give public access to your Site or Community. This means that you can now determine even more precisely which records and functionality are made available, preventing mishaps.

## Increased performance

Although improvements like 'improved caching with Salesforce CDN', 'Micro-Batching' and 'Account Role Optimization' might not immediately ring a bell, they do mean that Experience Cloud Sites perform even better in more demanding situations.

## Easier Maintenance

The Spring '22 update includes two very valuable improvements for administrators. Firstly, when making updates to your site you can display a branded 'Service Not Available' page on your site to non-admin and customer users. When you're done

making updates, activate your site to display the changes.

Secondly, it is now possible to archive your Experience Cloud Site. When a site is archived, its URL is unavailable to all users. And if you change your mind, you can always unarchive the site.
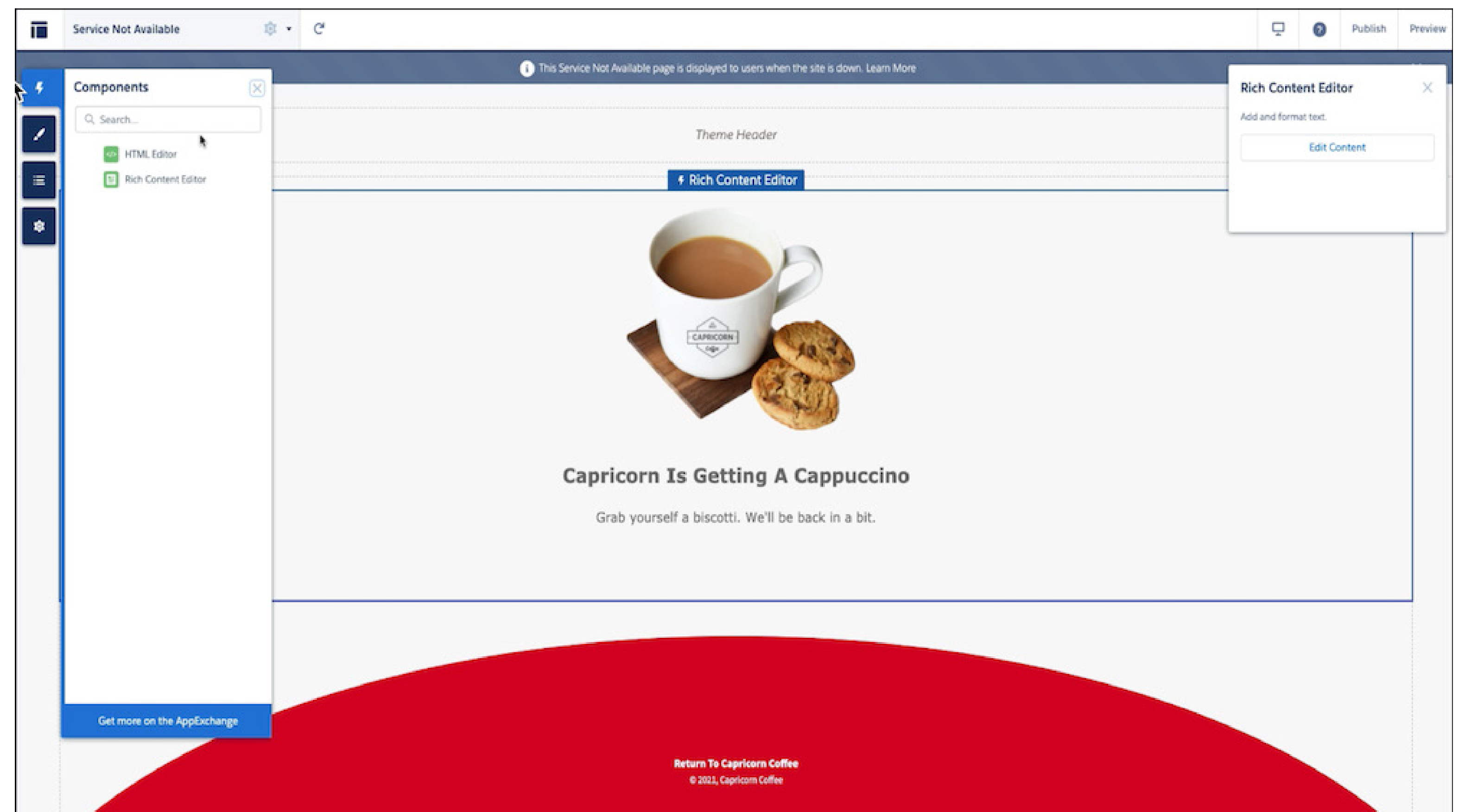


Read on →
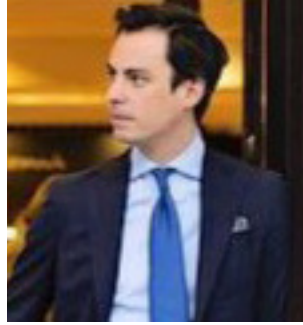
**Alexander Pennings**
Senior Consultant
Marketing Cloud

**Juul Stienen**
Salesforce
Consultant

# Marketing Cloud

This year we got a lot of really cool releases from Salesforce Marketing Cloud. Last october the 5th release of the year was introduced. The Spring release focuses a lot on Journeys, Mobile Messages, Einstein, Cross Cloud Integration and Social Studio. Salesforce announced as well that they are going to walk in line with SFDC releases in 2022.

## Chapter topics

> Customers Based on Specific Behaviors with EngageIn-App Message Triggers

> CloudPages URLs Support Tenant-Specific Endpoints

> Easily Add an Automatic Fallback for Interactive Email Forms

> Marketing Cloud Einstein

Read on →

## Engage Customers Based on Specific Behaviors with In-App Message Triggers

With the new release, you now have the possibility to display in-app messages based on specific user behavior anywhere within the app by creating triggers. There are many cool examples like a user views a specific screen or service in the mobile app. You can use the event triggers to create a meaningful engagement, increase brand loyalty and generate higher return on investment for your marketing campaigns.

How? Update your app to the next-generation MobilePush SDK (v8.0). Work with your Salesforce Partner and App Developer to configure events using the new Journey Builder Event Management screen. Ask your mobile app developer to track your defined events with the updated MobilePush SDK. Then configure your in-app messages with the applicable trigger criteria.

There are more benefits updating your next-generation Mobile SDK to (v8.0). These are the four biggest advantages from the update:

• **Session Limits—In MobilePush** Administration, cap the maximum number of In-App Messages that show within a session. Set the minimum time between message displays.

• **Dynamic Expiration—In the In-App** Message Activity in Journey Builder, set a unique expiration date for your In-App Message on a per-user basis based on when they reach the activity.

• **Delay Display—In the In-App Message** Activity in Journey Builder, control how long to delay the display of a message after all trigger criteria are met.

• **Cancel Display—In the In-App Message** Activity in Journey Builder, expire a message based on how the user exits the journey.

"With all the new releases you can deliver your customers the best experiences and gather better recommendations from Einstein to optimize the Customer Journey. Besides the functionalities it is good to see that Salesforce always puts Customer Trust and Security high to deliver high standards."

Read on →

## CloudPages URLs Support Tenant-Specific Endpoints

As part of Salesforce ongoing commitment to customer trust and security, integrations into Marketing Cloud are soon required to use tenant-specific endpoints.

Starting with the June 2021 release, CloudPages migrated to more secure URLs that use tenant-specific endpoints and moved away from the older stack-specific endpoints.

Certain types of existing CloudPages URLs can be impacted by this change and require updating. CloudPages created and published after the change on their stack use the new TSE-based URLs and aren't affected.

URL Change Examples:

**Old URL**
https://pub.exacttarget.com or https://[GUID].pub.sfmc-content.com

**New URL**
https://[string].pub.sfmc-content.com

Ensure that you evaluate where your CloudPage URLs direct traffic and update any hard-coded references to the new URL, which can be found in Marketing Cloud. Use the CloudPagesURL function whenever possible to generate CloudPagesURLs within Marketing Cloud rather than hard-coding them. Any customers performing additional validations on the domain or referrer in their custom scripting can experience issues when the change occurs.

## Easily Add an Automatic Fallback for Interactive Email Forms

Automatic fallback lets marketers add a call-to-action button that links directly to the email form on the Interactive Email CloudPage destination they set for the block. The Email Form block lets marketers easily create forms that render in many email clients. Until now, marketers had to create their own fallback experiences. Some were able to drive to an existing form, but others had to create a second form with CloudPages smart capture or another tool, which was more difficult.

## Marketing Cloud Einstein

Updated Einstein apps provide more reliable data based on some mail client providers' mail privacy updates. Einstein apps now show you more overview details on the app facts. Einstein content testing shows predicted winners and you can test more subject lines at once using Einstein Copy Insights. Einstein Engagement Scoring updates threshold defaults for more accurate data and they allow you to create smarter segments in Salesforce CDP. Web & Mobile Analytics is being retired in October.

To read all Release Papers,
please click here

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Design·Led
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Consulting