nextview

Salesforce
Release Paper

Winter   '22

Salesforce
Release Paper
Winter '22

Introduction

Huub Waterval,
CEO Nextview

nextview

Dear Trailblazer,

There you go! After a crazy year loaded with challenge and opportunity, we look forward to Winter '22 and the year that lies ahead. This is the period where we formulate our ambitions for 2022, continuing on our strategic plans and keeping up the good work.

Our collaboration with Gartner and Salesforce has delivered many interesting monthly live online-events and we will keep these going on a monthly basis. On top of that, we are growing in both the Netherlands and Germany, which is reflected in our many new hires. We are adding talent and expertise to our team from all over the world, creating even more positive impact that inspires.

In this sixth Release Paper, we have gathered the most interesting new functionalities and updates from the latest Salesforce releases. I hope you will enjoy reading it.

Should you have any questions: We are more than happy to help you improve your business. Feel free to contact us for a (virtual) cup of coffee or even for a first remote digital engagement.

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

**Huub Waterval
CEO Nextview Consulting**

Huub Waterval
CEO Nextview

Stef van den Oever,
Practice Manager
Customer

Service Cloud

Service Cloud keeps on growing in it's capabilities to ensure great customer experiences. This Winter '22 Service Cloud release introduces two functionalities we think are really powerful to our customers: Incident Management and Omni-Channel Flow.

Incident Management offers a great instrument to cluster cases by root causes and follow-up on these root causes. Omni-Channel flows allow for highly customised processes (without a single line of code) to bring your customers in touch with the right agent. Let's see what they have to offer.

Chapter topics

> Incident Management

> Smarter routing of customer interactions

Incident Management: Optimise solving root causes while delivering great customer service

Incident Management brings a powerful set of new standard objects to Service Cloud, all with the purpose of linking customer cases to internal incidents and problems that cause these. Using this set of objects you will be able to make smart automations to optimise case handling.

Take this example: AW Computing receives a case from a customer who has difficulties logging in on their server. Other service agents are receiving similar complaints from different customers. By logging an incident you are capable of grouping all cases so that AW Computing's engineering team has more examples to debug. By updating the related incident, all case owners know directly what update to provide the customer with. On top of that, by leveraging automation tools like Process Builder and Flow, case closure when a related incident is resolved can be automated. This saves a lot of time for agents and ensures customers are kept informed adequately.

Read on →

"The requirement to group cases by root cause has popped up in several of our Customer Service projects. In the past our customers would resort to a separate incident management platform integrated with Salesforce or custom objects within Salesforce to track these incidents. It's great to see Incident Management is now available out-of-the-box!"
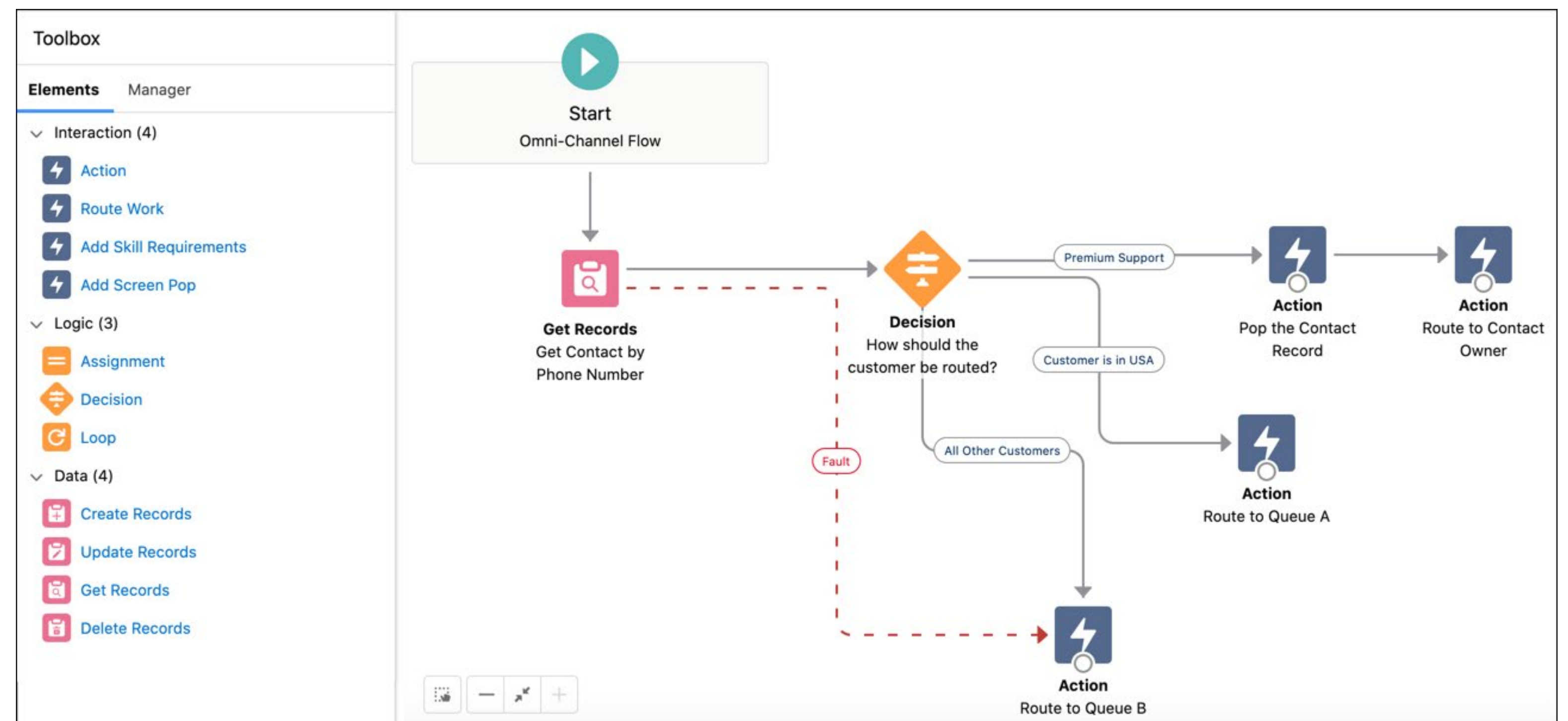
Read on →

Smarter routing of customer interactions (without a single line of code)

This functionality has been in the works for a while, but in the Winter '22 release it will be a public beta available to all Salesforce users! In order to route interactions like Cases, Chats & Messaging Sessions, you were usually dependent on Case Assignment Rules (static criteria-based queue routing) or Skills (which in most cases required some level of coding to connect the right skill requirements to routed interactions).

Omni-Channel flows combine the powerful point-and-click automations with Omni-Channel Routing. This opens up a world of opportunities to route inbound interactions to the right queue or agent.

Omni-Channel flows are available out-of-the-box for Voice Calls (via Service Cloud Voice) and Messaging Sessions, but similar functionality can be used for routing Cases and other (custom) objects, given that they're supported by Omni-Channel.

The Winter '22 release also adds support for Screen Pop, ensuring all relevant records are opened upon accepting the interaction, and Channel-Object Linking to automatically connect the interaction to the related customer.

Field Service Lightning

Patrick Gaspersz,
Senior Salesforce
Cosultant

Jefrey Schmidt,
Senior Salesforce
Consultant

The Winter '22 Field Service release introduces Field Service Customer engagement. Let your customer be in control of their appointment by allowing them to book, reschedule, cancel and confirm appointments leveraging self-service scheduling web pages. If you are in a high volume service appointment organization, it is worth looking at this feature from a call deflection point of view.

Field Service engagement comes with an additional fee. It is not part of the core Field Service licence.

Chapter topics

> Shift Planning Updates

> Proactive Preventive Maintenance

> Field Service Mobile

"The Field Service Winter '22 release has made some substantial improvements that will delight both customers and users. We collected the best takeaways, 4 items to look out for."
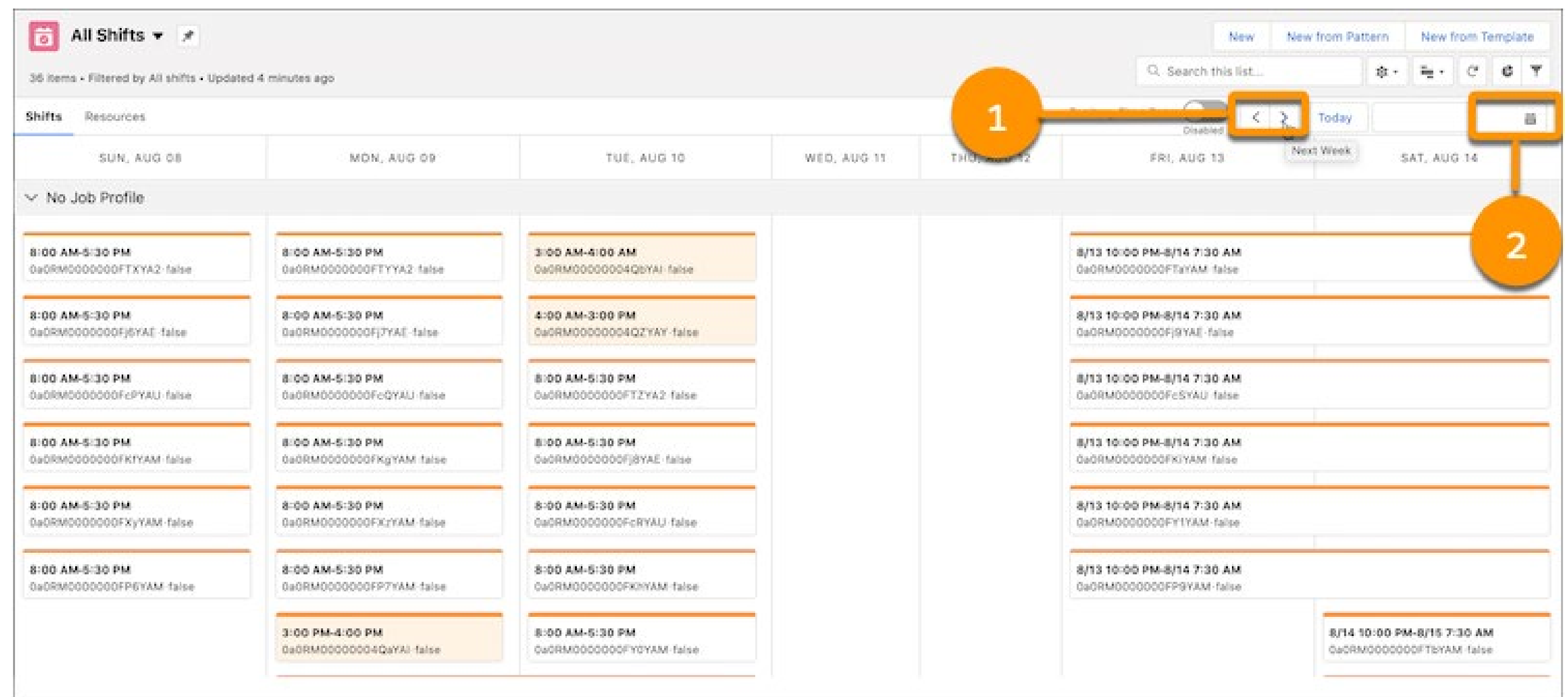
Read on →

"Engineers often arrive at closed doors, dispatchers spend hours rescheduling appointments, while customers want to plan appointments at a time most convenient to them. The self-service scheduling functionalities make it easier to put your customers in the driver's seat and give them a modern Field Service experience."

Read on →

Shift Planning Updates allow for more optimised shift planning

Winter '22 will provide some really nice updates when it comes to planning:
• Enhancements to the calendar itself. Quickly move from week to week or across months with an easy toggle arrow.
• Timezone management, a nice toggle for territory time zones. This feature is very powerful since it will let you view the shifts within the local timezone, instead of having to calculate yourself.
• Horizontal bar representing shifts on the schedule.
• Access to Shift templates that will enable you to create Shift records for multiple resources at once, instead of having to create those multiple times.

Proactive Preventive maintenance (beta)

Although this might seem an existing feature, Winter '22 enhanced Proactive Preventive maintenance to also allow you to create preventive maintenance plans based on events like asset use and conditions with the asset.

For example: if you have assets that shouldn't be running in temperatures over 100 degrees, you can create filter criteria, and a preventive maintenance record is created when it's exceeding the threshold. Obviously this feature relies heavily on having the data available for those criteria. Once you have, this could be a very powerful tool to prevent any future downtime of the equipment.

Field Service Mobile allowing field workers to be more productive while on the road

Inventory Management has gotten a bit easier with the Winter '22 release. The release introduces an improved interface to move products from warehouses to the work van or other locations with only a few clicks. All within the mobile app.
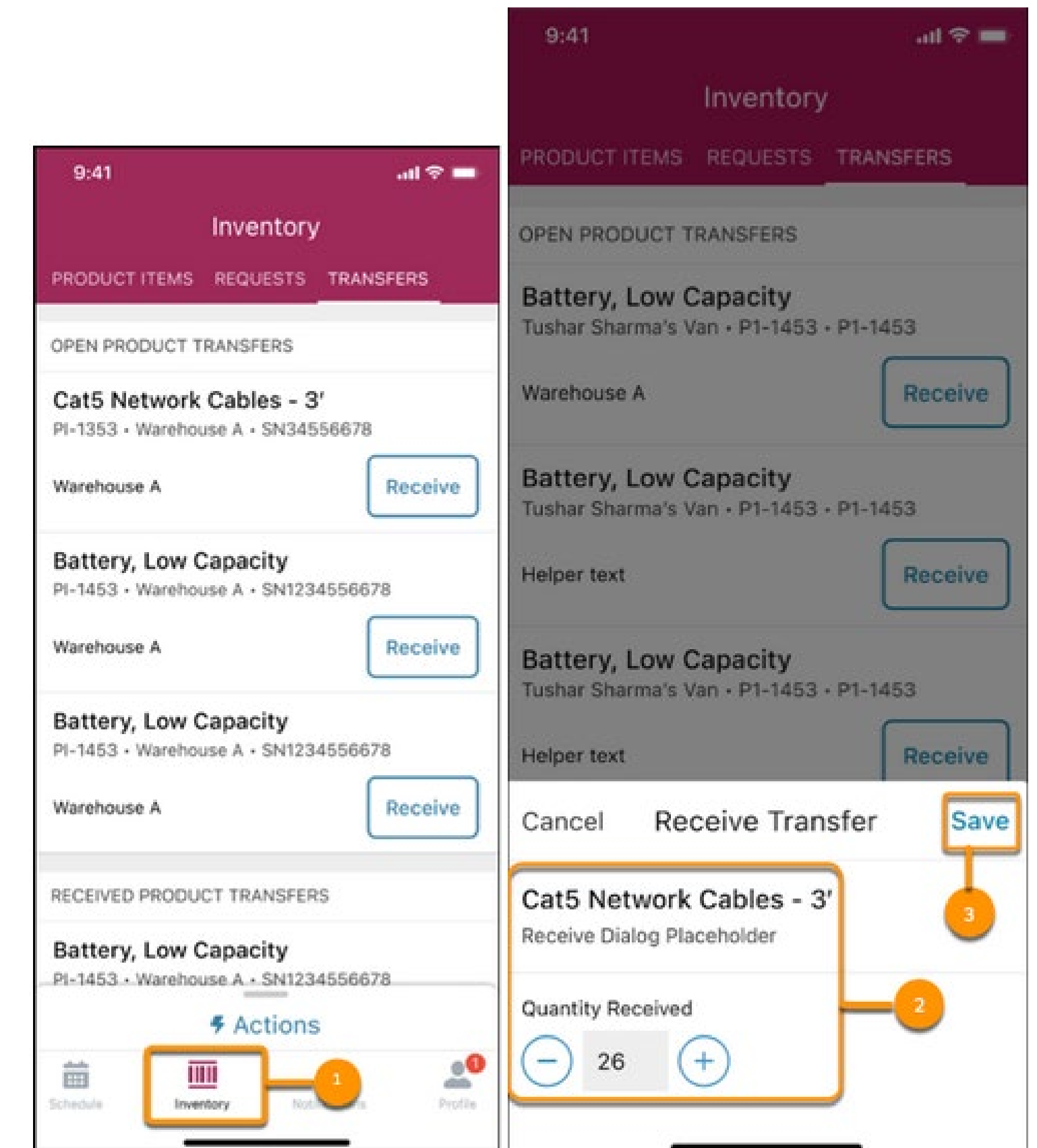
Thomas Renkers,
Managing
Salesforce
Consultant

Nicole Zwart,
Senior Salesforce
Consultant

Ignace Kozica,
Senior Salesforce
Consultant

Mille Bonekamp,
Salesforce
Consultant

Experience Cloud

The Winter '22 Experience Cloud release kicks off with some new features to the foundation for all Salesforce products and services. One of the most powerful features of Experience Cloud is the ability to configure it with low-code or click & drag components. On top of that, the Winter '22 release optimises your site performance on different levels as well as provides you with safer experiences. Have a look!

Chapter topics

> Customising LWR experiences without custom code

> Better performing experiences

> Safer experiences

"The Winter '22 release improves Experience Cloud on three important facets: Low-code development, performance and security."
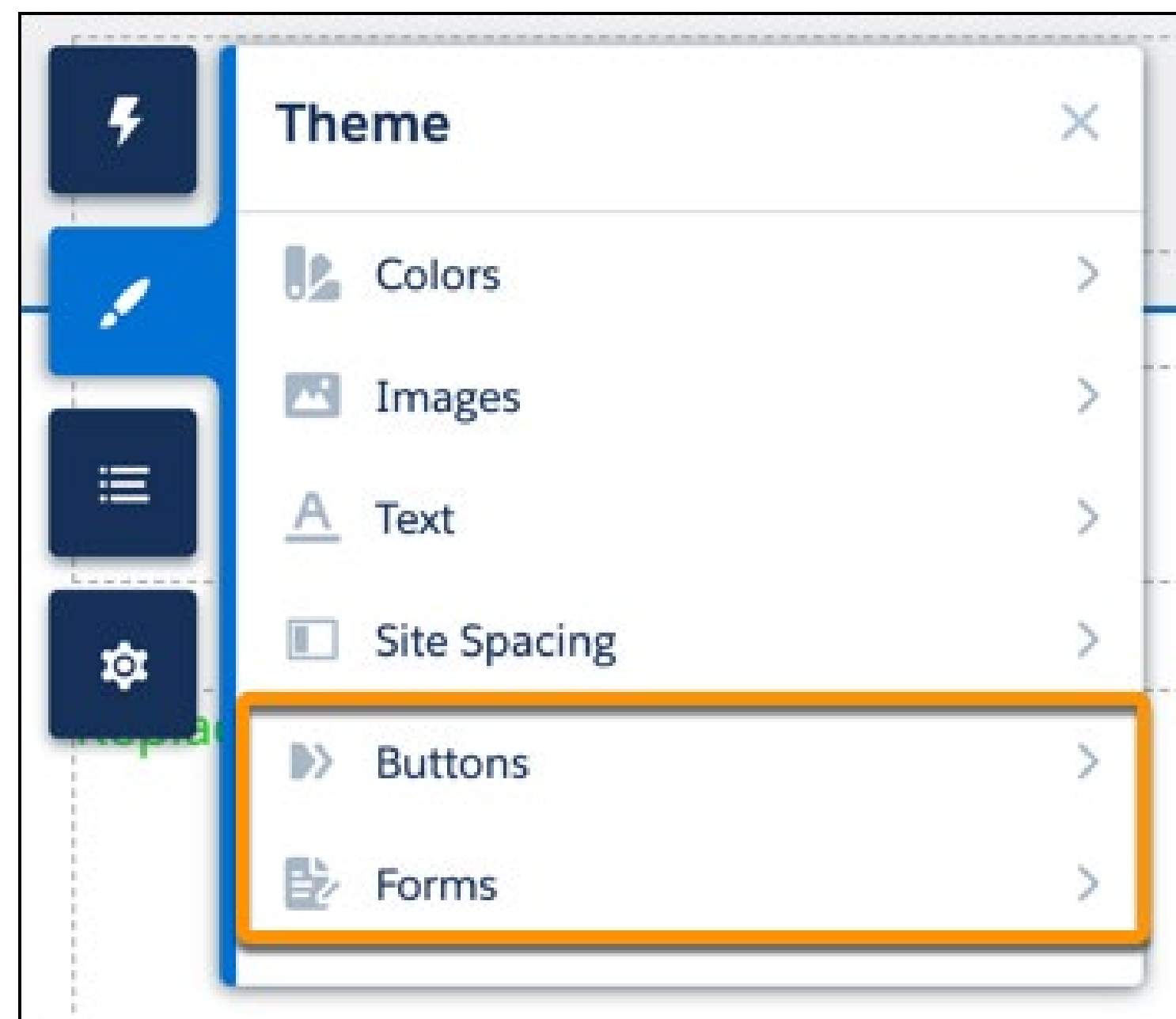
Read on →

Customising LWR experiences without custom code

One of the most powerful features of Experience Cloud is the ability to configure it with low-code or click and drag components. Salesforce added an exciting bunch of new configuration options for LWR (Lightning Web Runtime) sites. These include the option to theme buttons and forms without using CSS code.

In addition, when creating or editing a Page you can use additional click and drag components, such as Banner, Button, Horizontal Line, Image, Text Block, Tile, and Video.
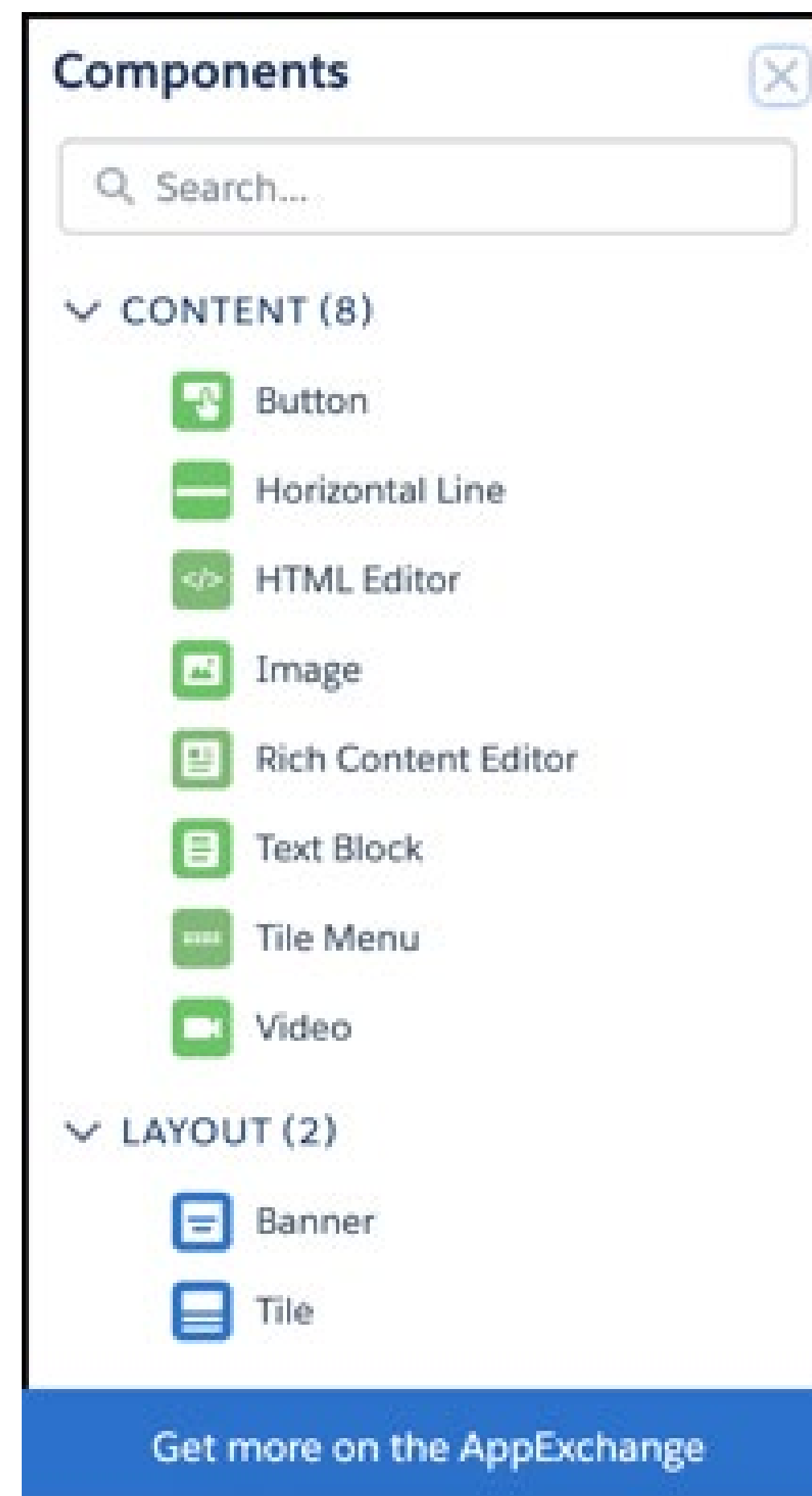
Better performing experiences

The Winter '22 release optimizes 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.

Safer experiences

Detailed Flow usage has been improved with the removal of the 'Run Flows' permission, allowing users to use the permission structure embedded in Flows.

Lastly, there are two release updates in Experience Cloud Winter '22. The first is the option to decide if you want unauthenticated users to see recognition badges. The 'Hide badges from guest users' is on by default. Second is the product access to guest users, which is now set to Private as the org-wide default for external users is no longer applicable to the guest user profile. Open up access via Sharing Rules.

Juul Stienen
Salesforce
Consultant

Marketing Cloud

What's new in the Winter '22 release for Marketing Cloud? Intriguing new material! Have a read about the new handy functionalities it has to offer. For example, as Slack is being integrated with all the Salesforce products, Marketing Cloud can't be left behind. Don't wait and read about all new Slack functionalities announced on the Marketing Cloud platform.

Chapter topics

> Datorama Insights for Slack

> Interaction Stidio integration with Experience Cloud

> Enforce Multi-Factor Authentication in Your Tenant

> Self-Serve SSL Certificates for Custom Domains

> Get Extended Data Extension Support in Marketing Cloud Package Manager

Read on →

Datorama Insights for Slack

As Slack is being integrated with all the Salesforce products, Marketing Cloud can't be left behind. In this release all new Slack functionalities are announced on the Marketing Cloud platform, enabling Marketing Cloud users to share Datorama insight straightaway. In just a few clicks, you are now able to share visual insights from Marketing Cloud on your Slack channel. This enables marketers to share their successes or usable insights right from Marketing Cloud with their teams on Slack.
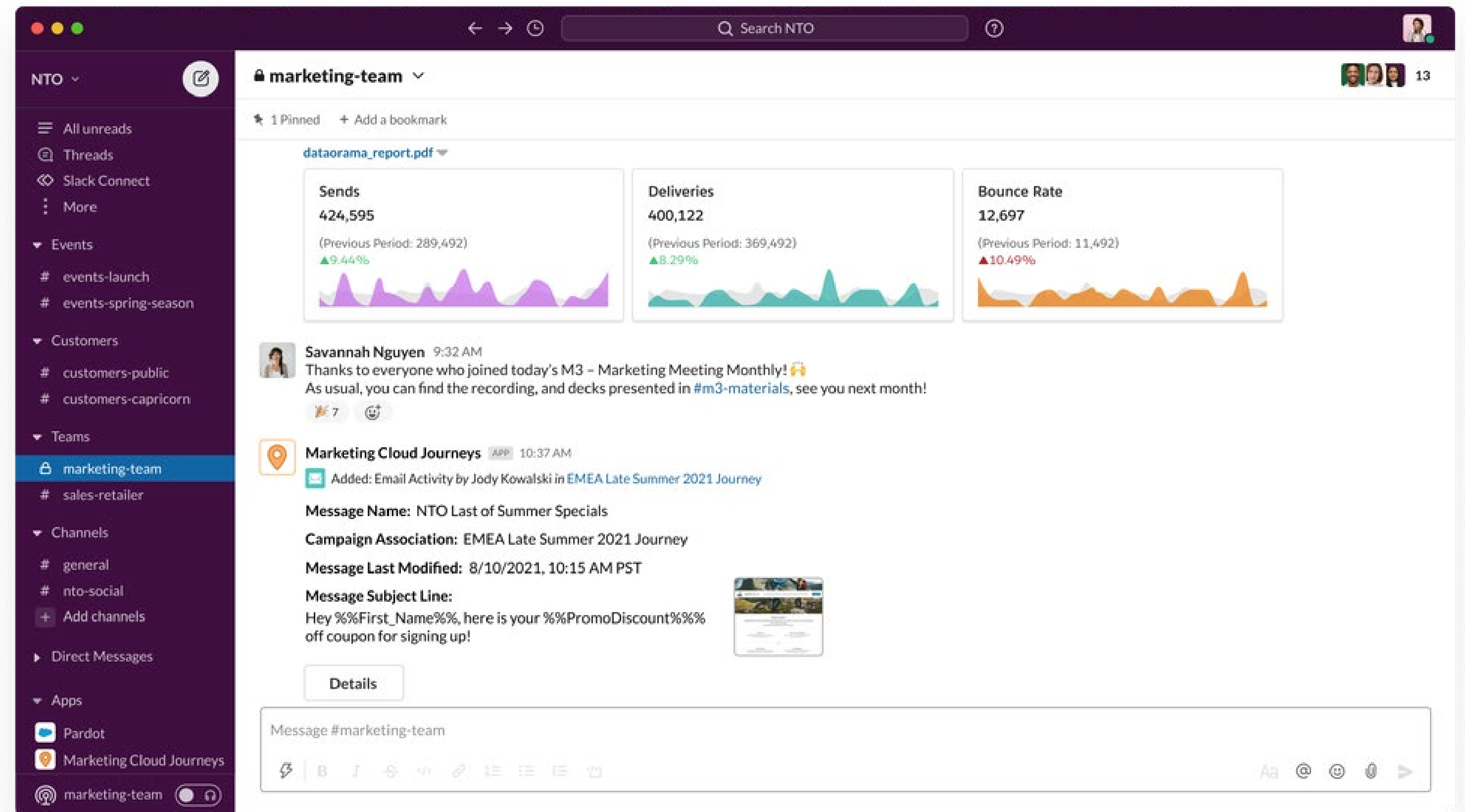
Interaction Studio integration with Experience Cloud

Track user behavior in Experience Cloud to enhance the user profile in this and other marketing channels. Personalize across all marketing channels in the Experience Cloud platform. Drive a better customer experience while collecting and tracking key user behaviors. And understand your customer and inform experiences across all your marketing channels.

This new feature enables marketers to personalize their marketing campaigns over several channels on the interaction a customer has with your website. For instance, if your customer is searching for a certain product category on your website, you can personalize your product recommendations in the weekly newsletter specifically for that customer, creating a truely one-on-one personalized engagement.

Enforce Multi-Factor Authentication in Your Tenant

Marketing Cloud admins can enforce multi-factor authentication (MFA) for all users. This setting prevents users in your tenant from skipping the registration process and forces them to register their verification method the next time they log in. This option applies only to Marketing Cloud tenants created before the August 2020 Marketing Cloud release.

When you start implementing MFA, don't forget to communicate the time and date of the MFA enablement to your users before enabling the feature in your account. Include information about the benefits of MFA, the importance of adoption, and the registration and verification method options in your announcement. This advance notice and guidance helps your users obtain and register their MFA verification methods. We recommend that users choose multiple verification options to ensure that they maintain access to their account.

"Improving the standards on deployment, security and domain management really makes the platform easier to manage as an admin."

Something you know
Login Credentials

Something you have
Authentication App
Security Key

MFA
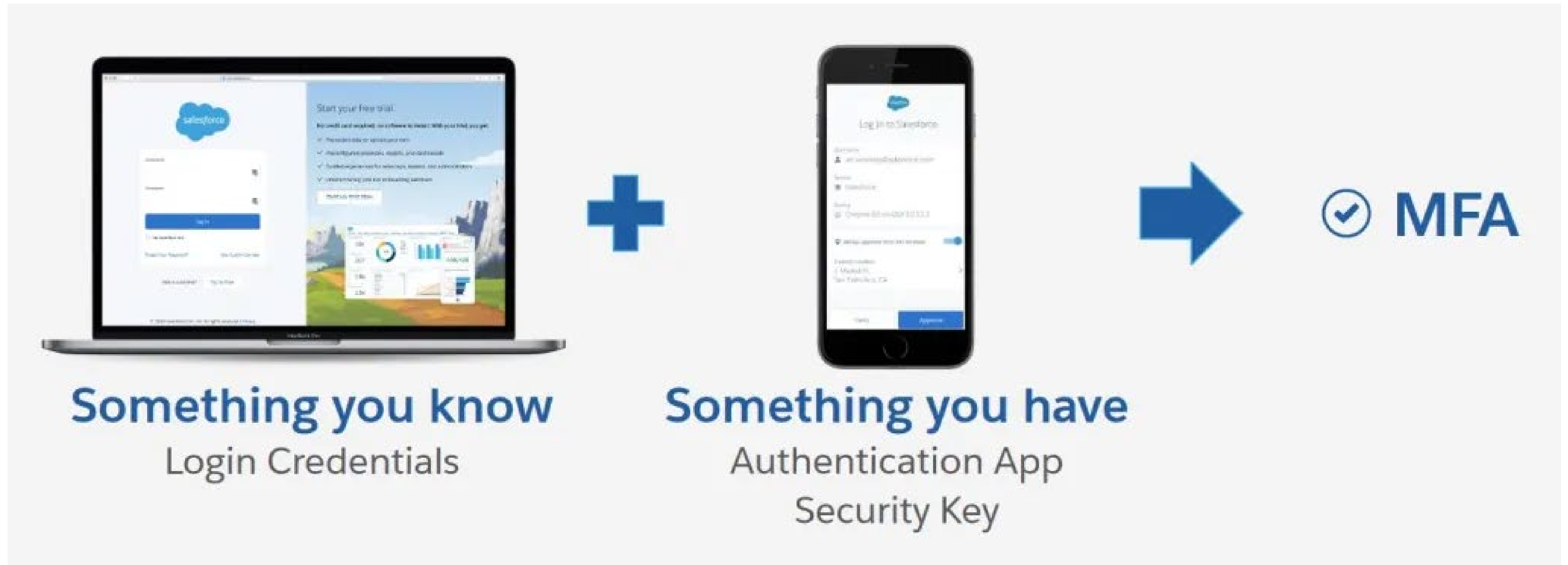
After MFA is enabled, the Marketing Cloud login process prompts all users, yourself included, to start receiving MFA challenges. When a user opts in, they are prompted to register a verification method, such as the Salesforce Authenticator app. They use that verification method to prove their identity each time they log in to their account.

Salesforce is planning to make this feature available to all applicable Marketing Cloud accounts by the end of August. You cannot disable this setting after you enable it. MFA will be mandatory for all Marketing Cloud customers beginning February 1, 2022.

Self-Serve SSL Certificates for Custom Domains

This feature lets you use Marketing Cloud Setup to secure custom domains configured for Sender Authentication Package (SAP) or private domains configured for CloudPages. In previous implementations you needed to submit a case to Salesforce. Provisioning SSL Certificates took up to 4-6 weeks to secure the domains. Now customers who

to Salesforce Marketing Cloud can secure custom domains in less than 10 days. This feature give you a good and quick overview of all your DNS statuses in your Marketing Cloud instance.

Get Extended Data Extension Support in Marketing Cloud Package Manager

Include synchronized and shared data extensions in your Marketing Cloud Package Manager deployment. Create synchronized and shared data extensions for audiences, decision splits, and more. Then deploy them with Marketing Cloud Package Manager.

Previously, Marketing Cloud Package Manager couldn't package or deploy items that reference these data extensions. Now, all shared data extensions must reside in the top-level account of a Marketing Cloud tenant. Any other shared data extensions are deployed as local items and aren't shared. Make sure that all synchronized data extensions exist in the business unit targeted for deployment. Otherwise, you receive an error and the deployment fails.
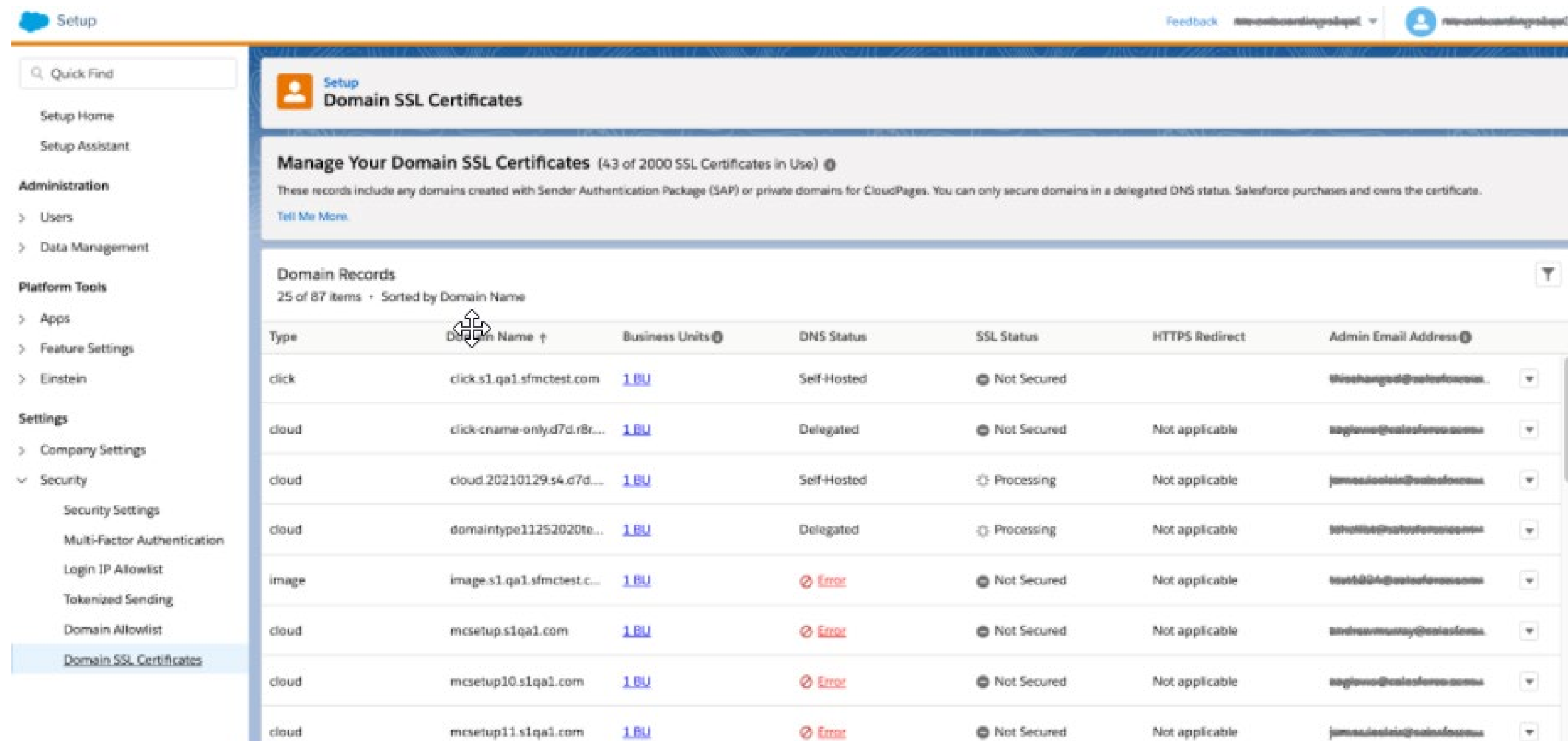
Chara Paschilidi
Senior Salesforce
Consultant

Ewa de Vries
Senior Salesforce
Consultant

Financial Services Cloud

In order to stay ahead of the competition, financial institutions have to provide a unique and personalised customer experience. Well kept, analysed and applied data can help you understand and prioritize your customers needs. This Winter '22 Financial Services Cloud release offers some exciting new features to connect the data dots, enhance collaboration and productivity, and boost efficiency. Let's take a look!

Chapter topics

> Record Association Builder

> Enhanced Financial Deal Data model

> Intelligent Document Automation

> Interaction Summaries

> Insurance Claims and Policy
  Analytics

Read on →

Record Association Builder

With the Winter '22 release, tracking the work output of branches, employees, and customer segments will reach a new level of efficiency with the more flexible Record Association Builder. This powerful tool allows you to define your own criteria for automatically linking new or changed records with specific branches in your organization.

Previously, the Record Association Builder supported only four standard Salesforce objects to be directly linked to the branch performance. Those objects were the Account (including Person Account), Lead, Opportunity and Case. Now, the Financial Services objects, Financial Account and Assets and Liabilities have joined the list, as well as any other custom object that you create. All you need to do is to enable the Record Association Builder from Setup, and then create new Criteria with your custom object and logic.

SETUP

Record Association Builder

Record Association Builder   On

Track your team's productivity using the Record Association Builder. Define criteria to automatically create association records in response to data creation or update events.

Note:

Only one of the Branch Association Settings or Record Association Builder features should be active at a time to avoid conflict. Branch Association Settings will eventually be retired. We recommend using the Record Association Builder since it offers the same record linking capability but provides greater flexibility to define your own association criteria.

More detailed: After the Record Association Builder is activated in your org, go to the Record Association Builder in Setup and click on the New Criteria button to define your new criteria.

Fill-in the name of your criteria, the association type, the object you want to associate and your custom logic. You can even use custom Apex Class logic to create the association record and take additional actions when the association criteria are met.

How does the Record Association Builder decide which Branch Unit to associate the records with? By default, the association uses the branch unit assignment of the user or contact specified in the Owner ID field of your custom record. If you want to use another record Id, for example the person you created the account for, then select the 'Use an alternative owner ID' option and select another lookup field on your object to specify the user or the contact you would like to use. You can also program your own custom association handler logic and deploy it as an Apex Class. The handler is called whenever the association criteria evaluation logic is met. An Apex Class handler can control the Branch Unit Related Record data that's created while at the same time executing other custom logic.

Action

☑ Use an alternate owner ID ⓘ

[Account].CreatedById 🔍

☑ Use Apex class ⓘ

AssociationHandlerImpl ✕
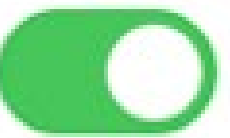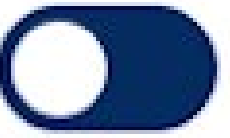
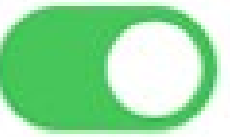## Enhanced Financial Deal Data Model

You can now leverage the many-to-many relationship options in the deal management settings to enable your teams to create flexible relations between financial deals and interaction summaries, and financial deals and interaction. For example, you can create one interaction or interaction summary to track details of multiple financial deals.

SETUP
Deal Management Settings

Give your bankers and financial advisors access to additional features and functionality to help them work faster and smarter

Deal Management
Manage and share deal-related information in an efficient and compliant manner.

Enabled

Role Hierarchy-Based Sharing for Financial Deals
Grant users access to financial deals using role hierarchies.

Disabled

Use Many-to-Many Relationships
Give deal teams the tools to handle many-to-many relationships between financial deals and interaction summaries, and financial deals and interactions. For example, deal teams can associate multiple deals for a single interaction or interaction summary.

Enabled

Read on →

Financial Services Cloud

What is more, you can now use Action Plans with the Financial Deal object to enhance collaboration and productivity by capturing repeatable tasks and automatically assigning task owners and deadlines for specific financial deal engagements. All you need to do is to add the Action Plan List component to your Financial Deal Lightning Page and you are ready to go.

Last but not least, you can increase your team's success by enabling Path for the Financial Deal object and defining the steps that are important for the financial deal execution. You can enable the feature from Setup > Path Settings, then click 'Enable'. Provide a name for the Path, select the Object as Financial Deal, and select the required picklist value.

Intelligent Document Automation

This new feature now supports multiparty authorization requests. This means that you can send requests to multiple parties, gather their responses, and automatically evaluate whether consent is reached. You can do so by adding a new Multiparty Info Authorization Request and specify the Authorization Type to control how multiparty consensus is determined. The options are All, Any, Half or Majority and Majority.

New Multiparty Information Authorization Request

Information

* Name
Jarndyce Trustees

* Data Use Purpose
Mortgage Initiation

Authorization Type
Half or Majority

Response Status
New

Source Record
Search Account Account Relations...

Cancel   Save & New   Save

Visit the Salesforce Winter '22 Release Notes website to learn even more about the exciting new features in Financial Services Cloud.

Financial Services Cloud

"These new enhancements will satisfy even the most demanding clients. They can work even more effectively as the team collaboration and deal management process was never easier before."

Interaction Summaries

Available since the Sping '21 release, the Winter '22 release brings further enhancement to the Interaction Summary. You can now:

• Quickly find details of attendees and open activities without navigating away from the component.
• Sort interaction summary records based on the creation date, interaction start date and time, or last modified date.
• Use populated records based on the Financial Deal, Opportunity, and Interaction Lookup Field to list your interaction summaries.
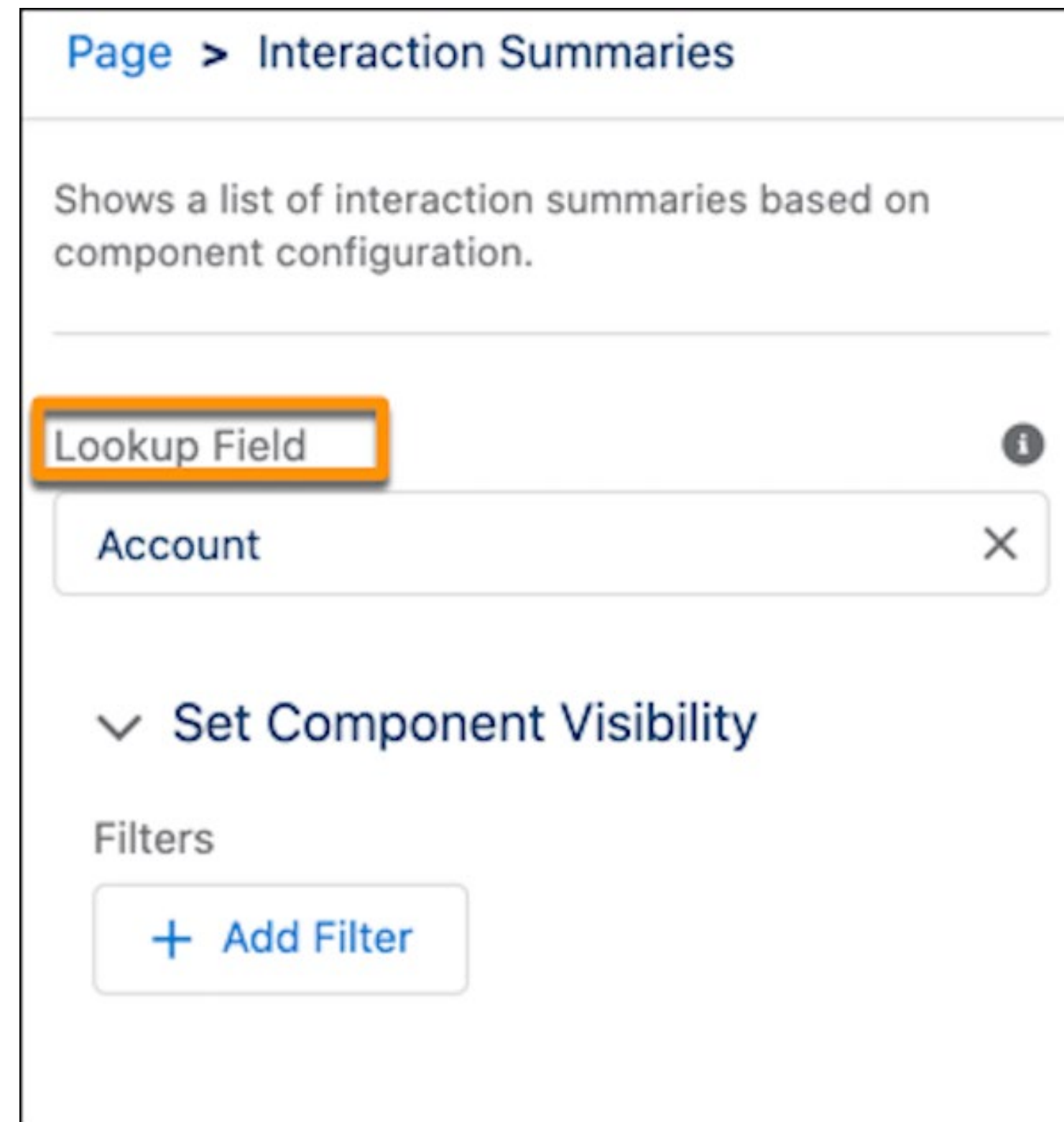
Insurance Claims and Policy Analytics

The Insurance Claims and Policy Analytics app helps you to enhance your customer satisfaction by providing a more personalised experience. You can now quickly assess customer needs and with actionable insights take immediate action. Thanks to the configuration wizard this app can be easily installed and customised to meet specific requirements. Keep in mind that in order to be able to use this app you need a SCAnalyticsPlus add-on license.

Read on →

Financial Services Cloud

Read on →

nextview | Chapters

"Insurance Claims and Policy Analytics app and enhancement in Interaction Summary gives companies the possibility to start building better and long lasting relationships with their customers."

Read on →

Dico Timmermann
Industry Lead of
Manufacturing

Manufacturing Cloud

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. In Spring '21, new features and functions around Rebate Management and Loyalty Management have already been released.

In this Winter '22 Manufacturing Cloud release, the biggest new feature is Advanced (Enterprise) Account Forecasting. Next to that, we are happy to introduce you to a couple of smaller, yet very handy, updates to the Sales Agreements and Rebate Management.

Chapter topics

> Advanced (Enterprise) Account Management

> Rebate Management Enhancements

> Sales Agreements Enhancements

Read on →

Advanced (Enterprise) Account Management

This new feature will help you to develop aligned forecasts to improve revenue, profit, and customer satisfaction. Get forecasts based on opportunities, orders, sales agreements, historical orders, and other custom measures considering all aspects of the business from Salesforce and beyond.

With Advanced Account Forecasting, you can create forecasts across regions, products, product categories, or other custom dimensions in a single instance of Manufacturing Cloud. Use forecast sets to independently configure and manage forecasts for different regions and business units. Forecasts can be calculated on a monthly, quarterly, or yearly cadence, giving your account managers the flexibility to make forecast adjustments when necessary.

Rebate Management Enhancements

Managing products for program rebate types has never been easier due to several new features and enhancements. The new and enhanced out-of-the-box Data Processing Engine templates allow you to...
• Define product-based eligibility easily and quickly with Product Filter Type on Program Rebate Type.
• Do More with the new and enhanced Template Data Processing Engine definitions.
• Rebate analytics.

Read on →

Sales Agreements Enhancements

The Winter '22 release adds the possibility to create sales agreements for product categories. Because of this feature, it is no longer necessary to create separate sales agreements for products that belong to the same product category.

Sales Cloud

Kelvin Vrede
CPQ specialist
& Salesforce
Consultant

The Sales Cloud Winter '22 release helps sales managers and their teams to conduct business better. Especially from a distance, since the Covid-19 pandemic forced us all to move from doing business traditionally to digitally. This release will discuss new possibilities in Sales Cloud, such as the revamped Pipeline Inspection features or the exciting new Salesforce Maps and High Velocity Sales tools. The first ones are included in your Sales Cloud license, that last one is available for an extra cost. For pricing details, contact your Salesforce account executive.

Chapter topics

> Pipeline Inspecion

> Salesforce Maps

> High Velocity Sales

Pipeline Inspection

With the new core features of Sales Cloud, sales managers can now inspect their pipeline better. They can create pipeline views and saved filters, track those important opportunities and much more. Pipeline inspection is all about saving time and getting an accurate view of existing or closing opportunities. For example: sales managers and reps can save their most frequently used pipeline views to avoid recreating them each time they visit Pipeline Inspection.

Also, sales managers can monitor priority opportunities in Pipeline Inspection by marking them as important. This way they will see a list view of all important opportunities, or just the important opportunities for custom filters such as record types, forecast categories, and sales teams. Additionally, Salesforce has given new tools to sales managers to better help their reps moving deals forward when opportunity next steps are not updated, or when deal health is low because opportunities have been pushed out too many times.

To read more, please click here.

Read on →

Besides, Einstein is here to help when the manual work gets too much. Sales managers and reps can see which deals are unlikely to close this month with the revamped Einstein Deal Insights. This new insight helps sales managers and their teams to forecast more accurately and maintain more accurate and healthy pipelines. In addition to that, Salesforce also introduces a better way for sales managers to prioritize deals more effectively with Tiered Einstein Opportunity Scores.

Pipeline Inspection groups Einstein Opportunity Scores into tiers. This gives sales teams a new way to see which deals are on track or to spot deals that are at risk. The tiers are: High, medium, and low, rather than numerical scores, which help sales teams prioritize opportunities and decide which sets of opportunities to focus on. The benefits of this seemingly simple tool are numerous. For example, sales managers can focus on healthy and more profitable deals instead of wasting time on deals that are not likely to fall through.

Read on →

"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 →

Salesforce Maps

Management can stop guessing about which territory needs more attention from their advisors, consultants or reps with Salesforce Maps. The feature allows them to automate up to 5,000 territory assignments, plot any Salesforce data on the map, and help find new business using filters for key demographics.

Management can now strategically approach, with the help of territories using heat maps to visualize attributes that matter to their teams. Specifically, the Salesforce Maps Territory Planning feature allows companies to gain better insight on where to position sales and service resources when visualizing key attributes on a heat map.
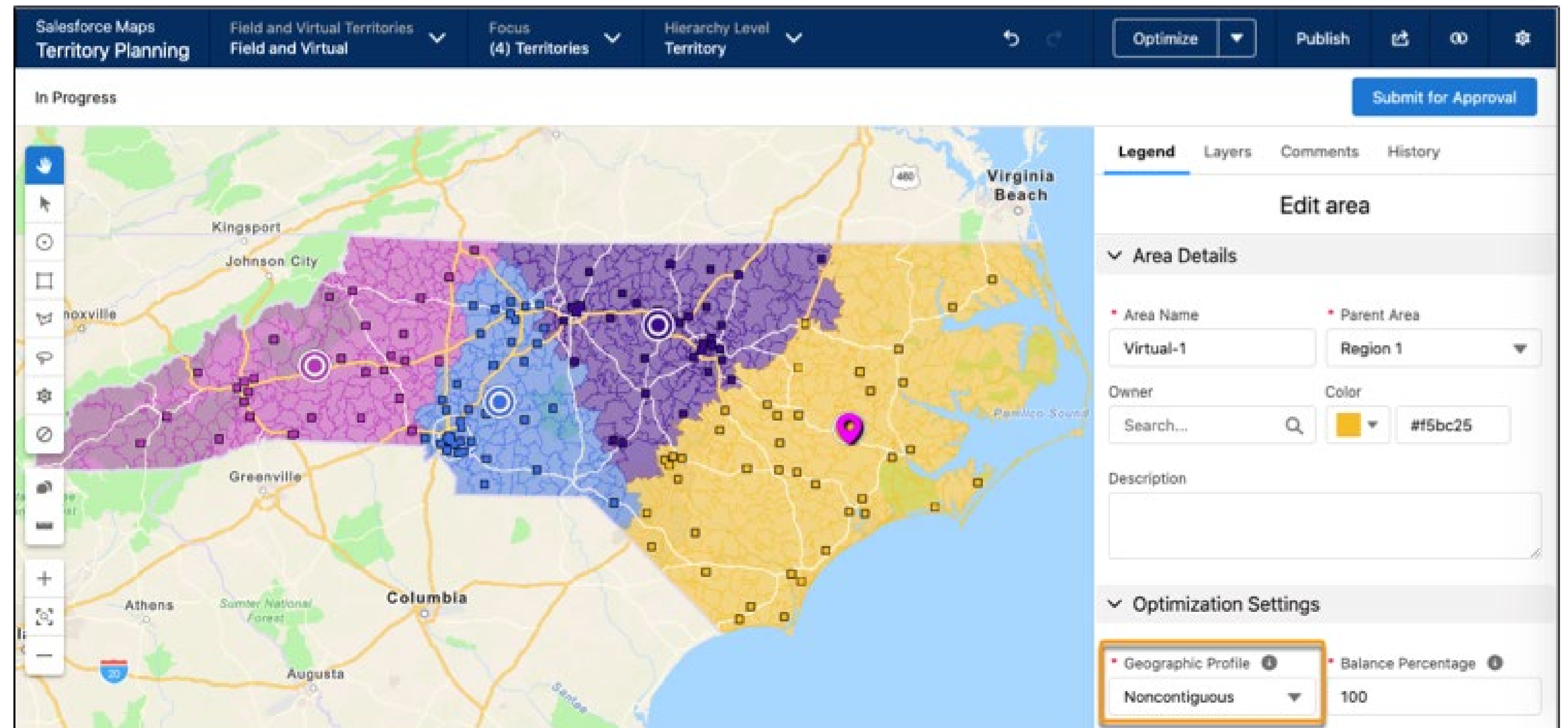
For example, annual revenue for accounts or order volumes that are imported from proprietary or third-party systems. Heat maps could then give visual indications for where they can bolster or reduce coverage so that management can meet and beat sales goals.
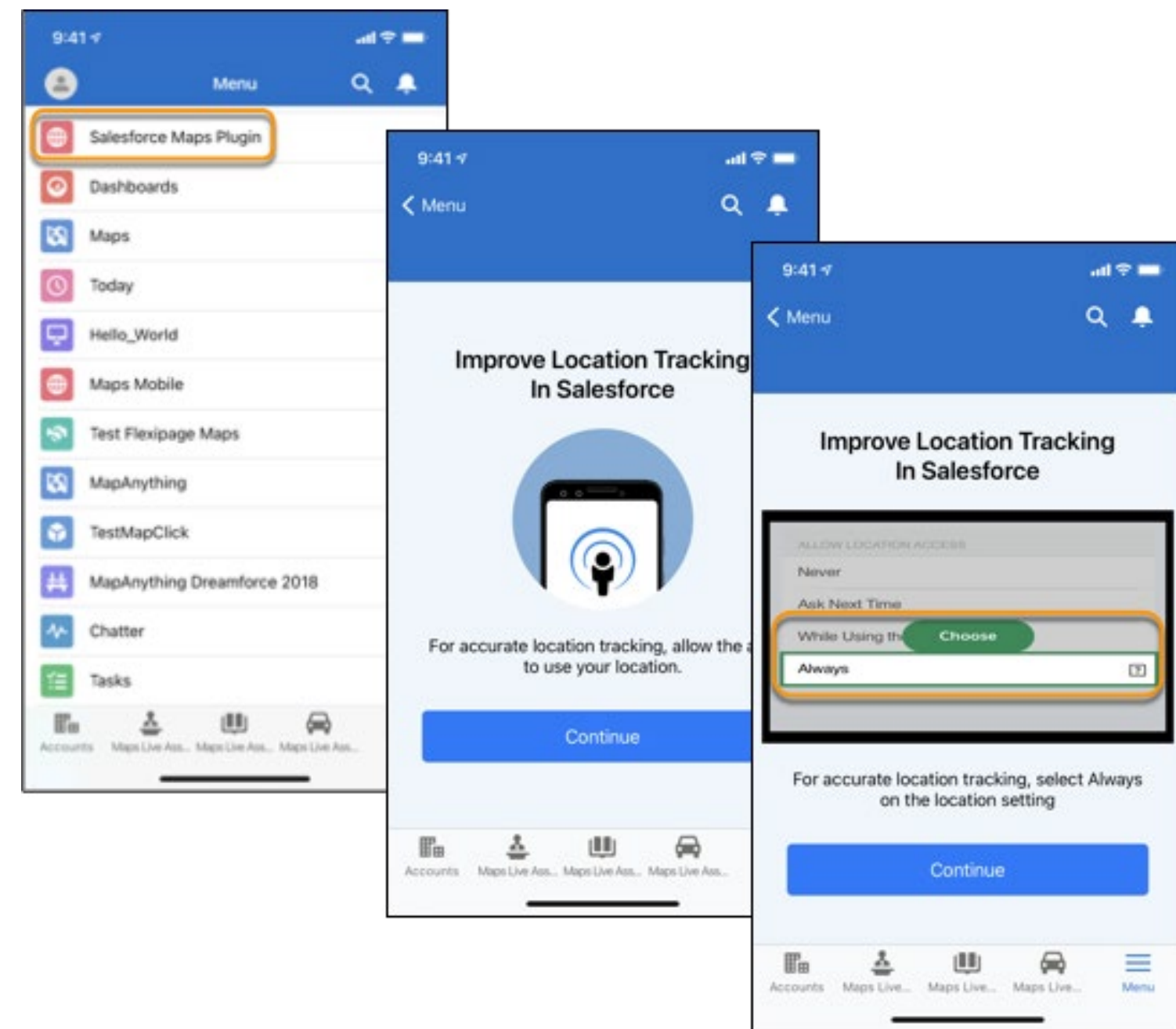
Additionally, the live tracking feature helps keep drivers focused on the road by automating reporting of their locations, trip-related data like work-related miles, and availability to pick up work using the Salesforce mobile app for iOS. This feature saves drivers the hassle of using multiple

mobile apps to report their whereabouts, delays, and availability, and to update Salesforce records.
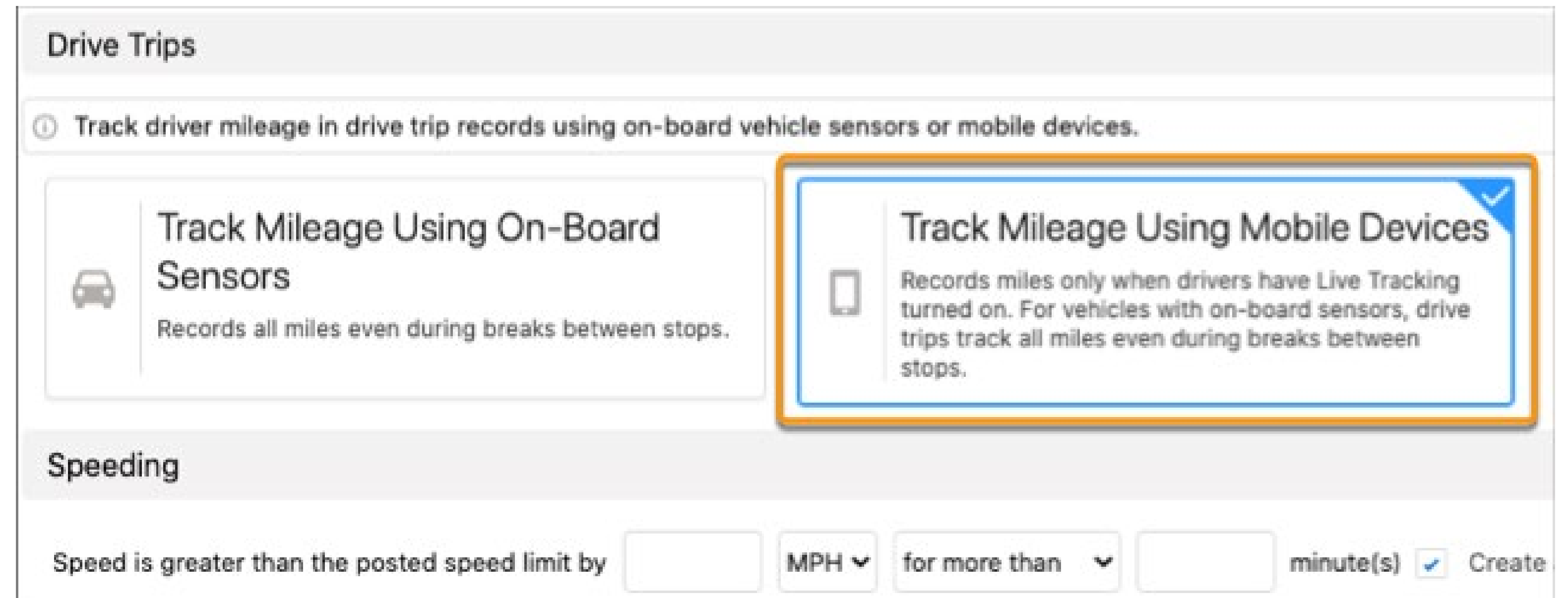
Dispatchers get insight into their drivers' location and trip-related data when they turn on Live Tracking in the Salesforce mobile app for iOS. This results in better management and planning of reps who are working in the field.
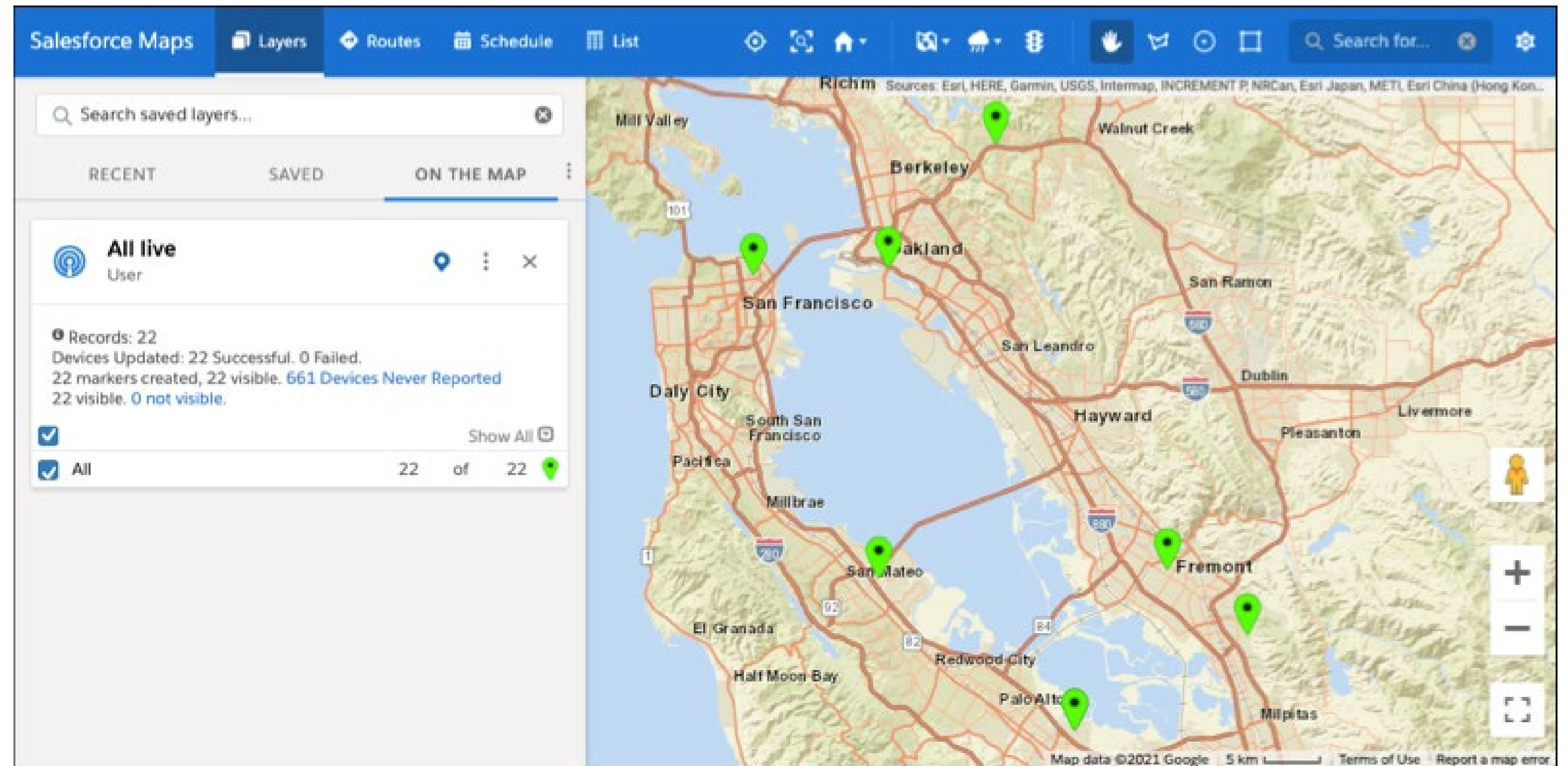
High Velocity Sales

Sales engagement has moved from more traditional to digital channels since the Covid-19 pandemic. And even though Salesforce High Velocity Sales* is designed to speed up the overall sales process for inside sales, sales development and business development teams through a combination of functions, the new feature's functions will help your sales team conduct business better from a distance. Businesses had to perform well online even before the pandemic, but with the latest business developments like workforces working from home, they now have to do so even more.

Sales managers can now test their sales assets and cadences for online performance. In addition, active sales cadences can be edited, test different email templates and call scripts on the same step without interrupting sales outreach. Plus, they can get detailed insights about the cadences, sales rep performances, and add, remove, or pause targets from reports.

⌄ Step: Manual email send   ⟵⟶ Includes variant testing

Last 3 Months ▾

Engagement Over Time

Unique Opens ▾

This chart shows data starting in July 2021. To see earlier data, your Salesforce admin can create the Sales Cadences & Steps with Monthly Metrics custom report type.

HVS Template ●—
Automated email template. ●—

Engagement Rates

This table shows data starting in July 2021. To see earlier data, your Salesforce admin can create the Sales Cadences & Steps with Monthly Metrics custom report type.

Template Name ⌄	Split... ↓ ⌄	Emails Sent ⌄	Delivery % ⌄	Unique Open %
Duncan's Email Template	34%	0		
HVS Template	33%	1	100%	
Automated email template.	33%	6	100%	

Moreover, with the variant testing function sales managers can find out which email templates and call scripts perform best. Using sales cadence steps with variant testing to test different email templates or call scripts to see which is most effective with prospects saves a rep the hassle of wondering which email or script version works best.

Has this release paper already stated that managers can add and remove sales cadence targets from reports? Maybe it's worth mentioning twice because with the inline editing functionality of the previous releases, sales managers can now directly edit targets and update their sales cadence membership directly from the reports. Plus, they can use reports to segment and prioritize sales target groups.

To put the cherry on top, Salesforce High Velocity Sales introduces The High Velocity Sales Sample Dashboard to help sales managers keep track of their sales team when it's running like a well oiled selling machine. The dashboard displays sales cadence and sales rep performance at a glance. Additionally, it can display up to 17 key metrics such as email and call volume, engagement, and outcomes all in one place. Managers can drill into each dashboard component for details to help improve weak areas or to get insights of the team's performance.
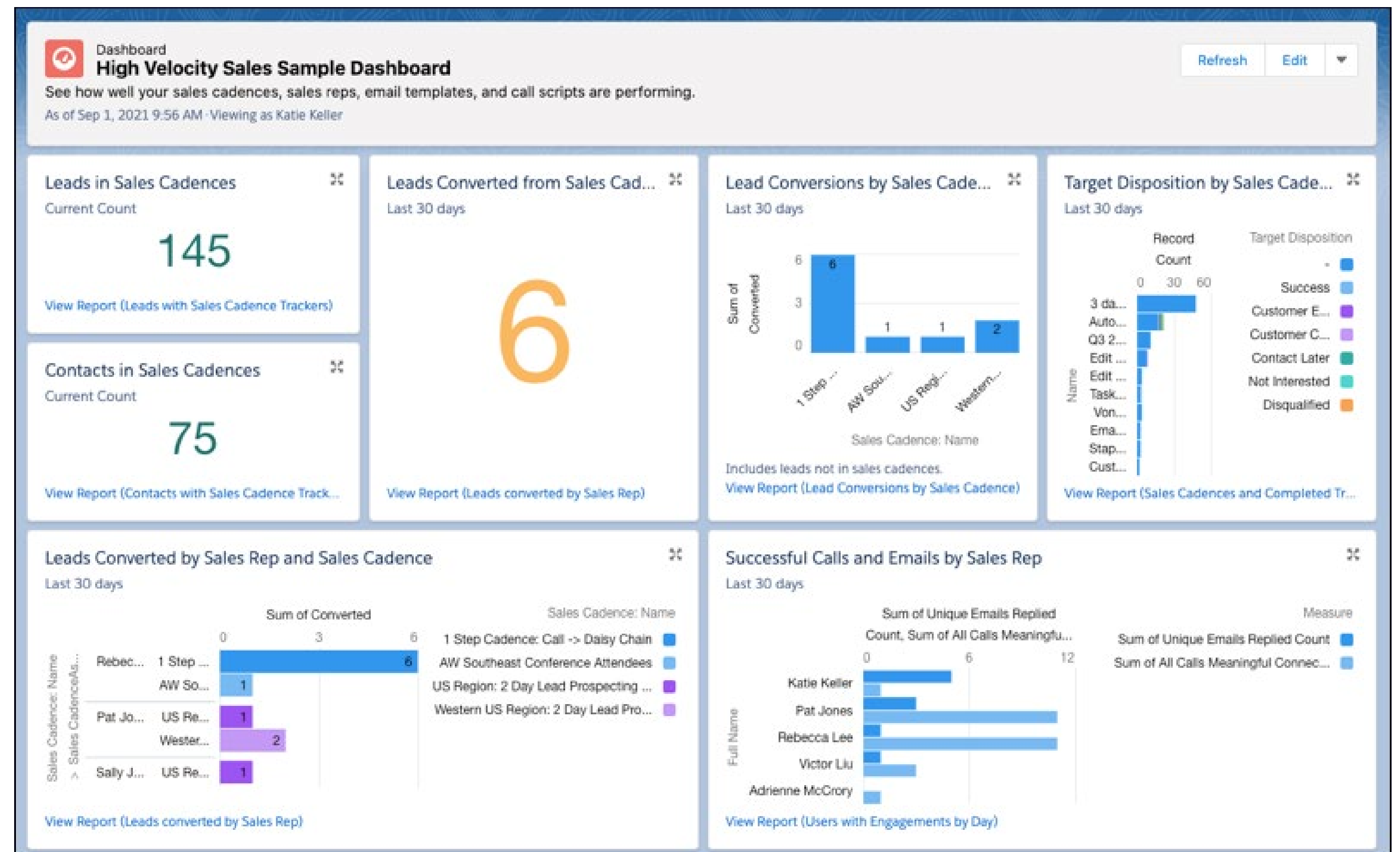
Kelvin Vrede
CPQ specialist
& Salesforce
Consultant

Pardot

Many companies boost their businesses by using Salesforce Pardot. This tool is like a Swiss knife equipped with many features. With this Winter '22 release, the tool is even more versatile than before. For instance, Salesforce Pardot in combination with Slack introduces a Beta feature that sends Slack notifications. On top of that, marketers can always opt in for viewing IP addresses for prospect activities. This is exciting material! Continue reading...

Chapter topics

> Slack Notifications with Completion
Actions

> IP Address for Prospect Activities

> Landing Pages

Slack Notifications with Completion Actions

Ever wondered if and how prospects interact with your marketeers' marketing assets, like sales letters, brochures, and presentations? Well, Salesforce Pardot in combination with Slack introduces a Beta feature that sends Slack notifications to Pardot Users with completion actions of prospects. This way marketers can automatically send promising new leads to the Sales team, and share important prospect activity data with others, which eventually results in speeding up your pipeline. Note: this is a Beta service, please read the Agreements and Terms.

IP Address for Prospect Activities

If getting Slack notifications is not enough, marketers can always opt in for viewing IP addresses for prospect activities. This way they can better understand engagement data by viewing the IP address associated with most prospect activities on prospect records in Pardot. One of the main benefits for marketers is that they can use this additional insight to create more effective visitor activity filters. For example, if a marketer notices a lot of test clicks coming from a single IP, they can filter out that activity based on the IP address. This Salesforce Pardot update applies to all Pardot editions, so there are no extra costs attached to this new feature.

Landing Pages

On top of the above mentioned features, marketers can now build landing pages faster with the drag-and-drop editor. However, this is only doable if they are using the Pardot Lightning App.

This new update allows creating a landing page record in just a couple of clicks. Additionally, other users can be encouraged to stay on brand by letting them start from saved templates and to select approved images from the Salesforce CMS repository.

Read on →

An additional feature that is also helpful is that the landing page Source field helps distinguish landing pages that are built in Lightning Experience or in Pardot Classic. The lightning landing page builder's landing pages are labeled Salesforce, and Classic pages are labeled Pardot.

How to enable this feature? The landing page builder becomes available when the new Pardot content experience and Salesforce CMS integration is enabled. If the drag-and-drop email editor in Pardot Lightning App is already in use, marketers can start using the new landing page builder on the fly! However, if you only use Pardot Classic builders, then the administrator should navigate to the Marketing Setup and follow the steps under Content Setup. Also, this change applies to all Pardot editions, meaning no one is left out.
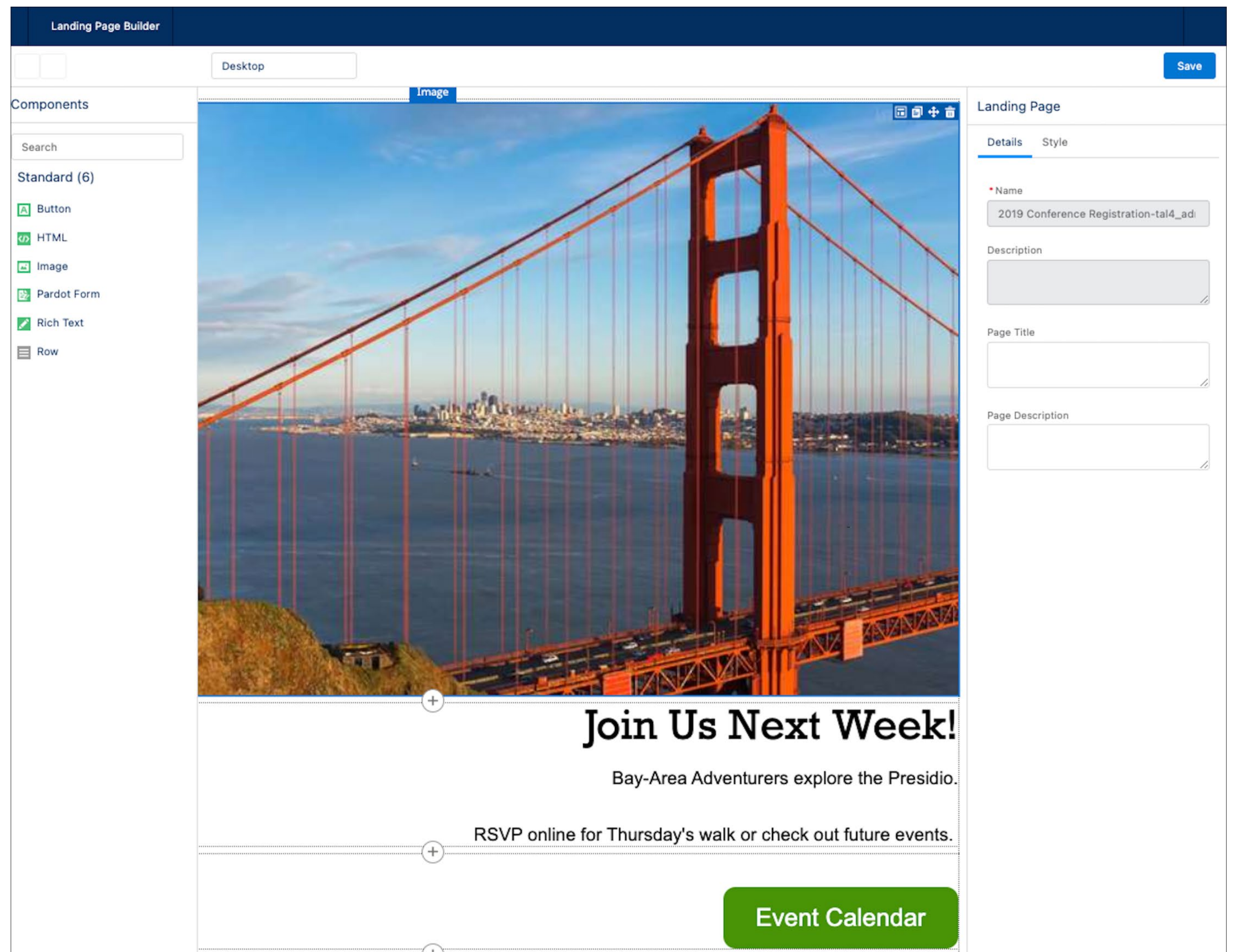
Sjoerd Santegoets,
Solution Architect

Mohammed Al Atrash,
Integration Architect

Mulesoft

You know MuleSoft Anypoint Platform as the integration solution capable of supporting IT architecture. We are exited to share the news that MuleSoft completed the acquisition of Servicetrace, which will help to bring MuleSoft RPA to customers. The new RPA capabilities will be part of MuleSofts unified platform and composable business vision, as well as a solution for the Salesforce Customer 360.

Another newsfact is the release of MuleSoft Compose: The promise to enrich your 360-degree customer view by empowering business teams with a no-code solution - embedded in MuleSoft or Salesforce - for quickly unlocking data, connecting apps, and automating integration workflows to boost productivity. This Winter '22 MuleSoft release, however, will focus on some of the platform's main new features.

Chapter topics

> Anypoint Mule Runtime 4.4

> Anypoint Studio 7.11

> DataWeave 2.4.0

> Anypoint Access Management

> Anypoint Monitoring

> Connectors

> Templates

Anypoint Mule Runtime 4.4

Mule runtime engine 4.4 just released. The feature provides important enhancements and fixes:

• Mule event correlation management enhancements: You can now modify the correlation ID and change the algorithm to generate correlation IDs.
• Logging and tracking now provide more context (MDC: Mapped Diagnostic Context)
• DataWeave Mule 4.4 includes DataWeave 2.4.0.

Anypoint Studio 7.11

Anypoint Studio is an Eclipse-based integration development environment for designing and testing Mule applications with:

• Added support for Mule runtime engine 4.4.
• Added Secure Storage.
• Dataweave 2.4.
• Added Referenced By option for flows and subflows.
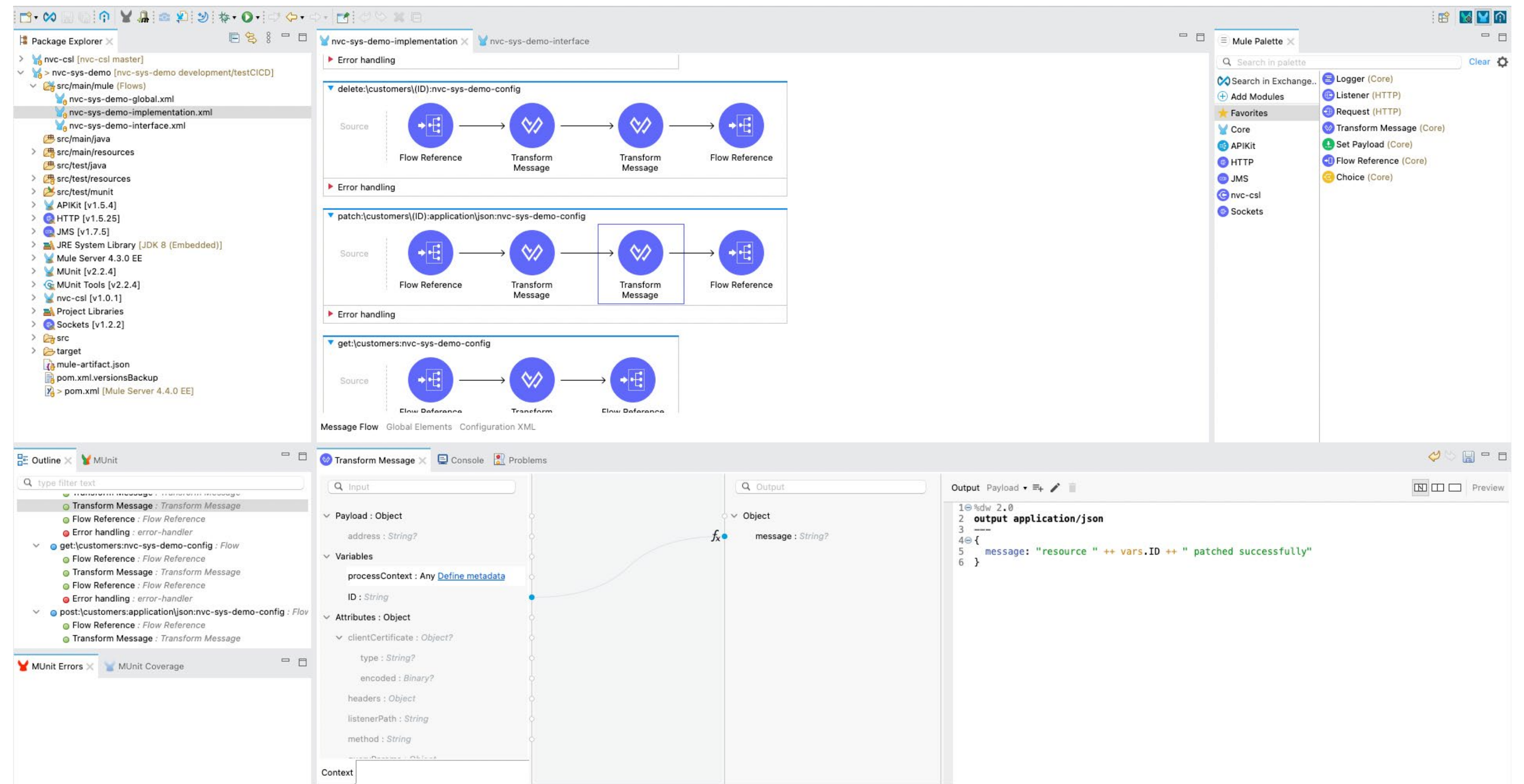
Read on →

DataWeave 2.4.0

DataWeave is the programming language designed by MuleSoft for data transformation. It is also the expression language Mule Runtime Engine uses to configure components and connectors. It offers:

• Ability to read larger-than-memory strings automatically. When you are using the indexed reader strategy and processing a string with a size larger than 1.5 MB, DataWeave automatically splits the value in chunks to avoid out-of-memory issues.
• New reader and writer properties for working with data formats. For example, the XML writer now enables you to define namespaces at the root level.
• Many new modules, functions, types, annotations, and variables. Some are experimental and subject to change in future releases.
• New functions for null handling

"As a leader compared to other IPaaS providers, MuleSoft offers a full hybrid integration platform solution for integration and API management: the backbone requirements for any digital transformation journey."

Read on →

Anypoint Access Management

Organizations created after August 19, 2021 automatically have multi-factor authentication (MFA) enabled for all users. Unless exempt, all user accounts in MFA-enabled organizations must use MFA to log in to Anypoint Platform.

Anypoint Monitoring

Anypoint Monitoring now has two product-specific permissions: Anypoint Monitoring Viewer and Anypoint Monitoring Administrator.

• The Anypoint Monitoring Viewer permission enables a user only to view assets in Anypoint Monitoring.
• The Anypoint Monitoring Administrator permission enables a user to view, create, modify, and delete assets in Anypoint Monitoring.

The Overview section of built-in API dashboards for enhanced metrics has two new charts. The Total 4xx Errors and Total 5xx Errors charts show the sum of all 400- and 500-errors respectively.

Connectors

As Mulesoft's ambition is to connect anything to everything, Mulesoft has again released new (updated versions of) connectors. Here are some of the connectors which have been released or updated lately:

• **Snowflake Connector:** Snowflake is becoming increasingly popular as a data lake. Mulesoft has now released a connector to connect with your Snowflake instance to load data, run queries in Snowflake tables, and sync data with external business applications.

• **EDIFACT EDI Connector:** EDIFACT is an international standard for electronic data exchange and has been updated by Mulesoft. EDIFACT supports exchange of a wide variety of document types, such as invoices, purchase orders, delivery notes, etc.
• **DocuSign Connector:** The new version of the Anypoint Connector for DocuSign can be used for digitally signing agreements.

MuleSoft

"MuleSoft enables you to focus on the business value of your solution by wiping away most of the technical complexity and providing out of the box connectors and capabilities."

Read on →

Templates

As part of the development process, MuleSoft provides a number of templates which can be used as a baseline for integration with Salesforce. Here are some examples of those templates:

Oracle Siebel to Salesforce Contact Migration

This template moves a large set of contacts from Siebel to Salesforce. You can trigger the migration manually or programmatically with an HTTP call. Contacts are upserted, so the migration can be run multiple times without worrying about creating duplicates. The parent accounts are migrated if they do not already exist in Salesforce. This template uses batch to efficiently process many records at a time.

S/4HANA Cloud to Salesforce Product Migration

This template moves a large set of product objects from SAP S/4HANA Cloud to Salesforce. Product objects are upserted, so the migration can be executed multiple times without concerns about duplicating information. This template uses MuleSoft's batching capabilities to move a large set of data easily and transparently from SAP S/4HANA Cloud into Salesforce.

Flow Designer Template: Salesforce Order Automation (Salesforce, Database, API, Twilio)

This template shows how to automate the order-to-cash process. When opportunities are marked 'Closed Won' in Salesforce, you may retrieve product information from an internal database, place orders via an Order API, and message the customer with information about that order.

Robert-Jan van Erp,
Solution Architect

Salesforce Platform

The Winter '22 Salesforce Platform release ads several handy features to the foundation for all Salesforce products and services. With this new release, button labels in the flow screen footer can be adjusted, pending record changes can be rolled back. We will elaborate on the new Flow Orchestrator and tell you all about the new dynamic interactions in Lightning Pages. O, and Einstein Vision has some exciting new possibilities as well!

Chapter topics

> Customized Button Labels

> Roll Back Records

> Flow Orchestrator

> Dynamic Interactions

> Salesforce Functions

> Einstein Vision

> Additional Features

Customize Button Labels in the Flow Screen Footer (Beta)

With the retirement of Workflow rules and Process Builders coming soon (Winter '23), there is a constant need for flow enhancements so that they can provide a better user experience.
This new feature gives users more insight when navigating or when completing a flow. Until now, there was no option to customize the buttons in the footer of the flow and therefore, there was no clear indication of what happened upon clicking the button. Now, it is possible to change the text in the navigation buttons from Previous, Next or Finish to a custom label, describing the exact action that is going to happen.

For example, in the picture on the right the user gets a clear indication that the customer is created after clicking the button.

Name

First Name

First Name

Last Name

Last Name

Phone

Email

you@example.com

Create Customer

Roll Back Pending Record Changes When a Flow Element Fails

Maybe the most useful and needed flow enhancement so far is the Roll Back Records element. This cool and powerful element helps to prevent duplicate records or incomplete data and can satisfy even the most demanding customer needs.

In the example illustrated in the picture on the right, you need to create a customer and an opportunity. When the opportunity gives an error the customer is already created. With the new flow element Roll Back Record you can undo the creation of the customer record, since you no longer need it. Next, you navigate back to the screen and you can update the opportunity value that gave the error. When navigating to the next screen, the customer and opportunity are created successfully.
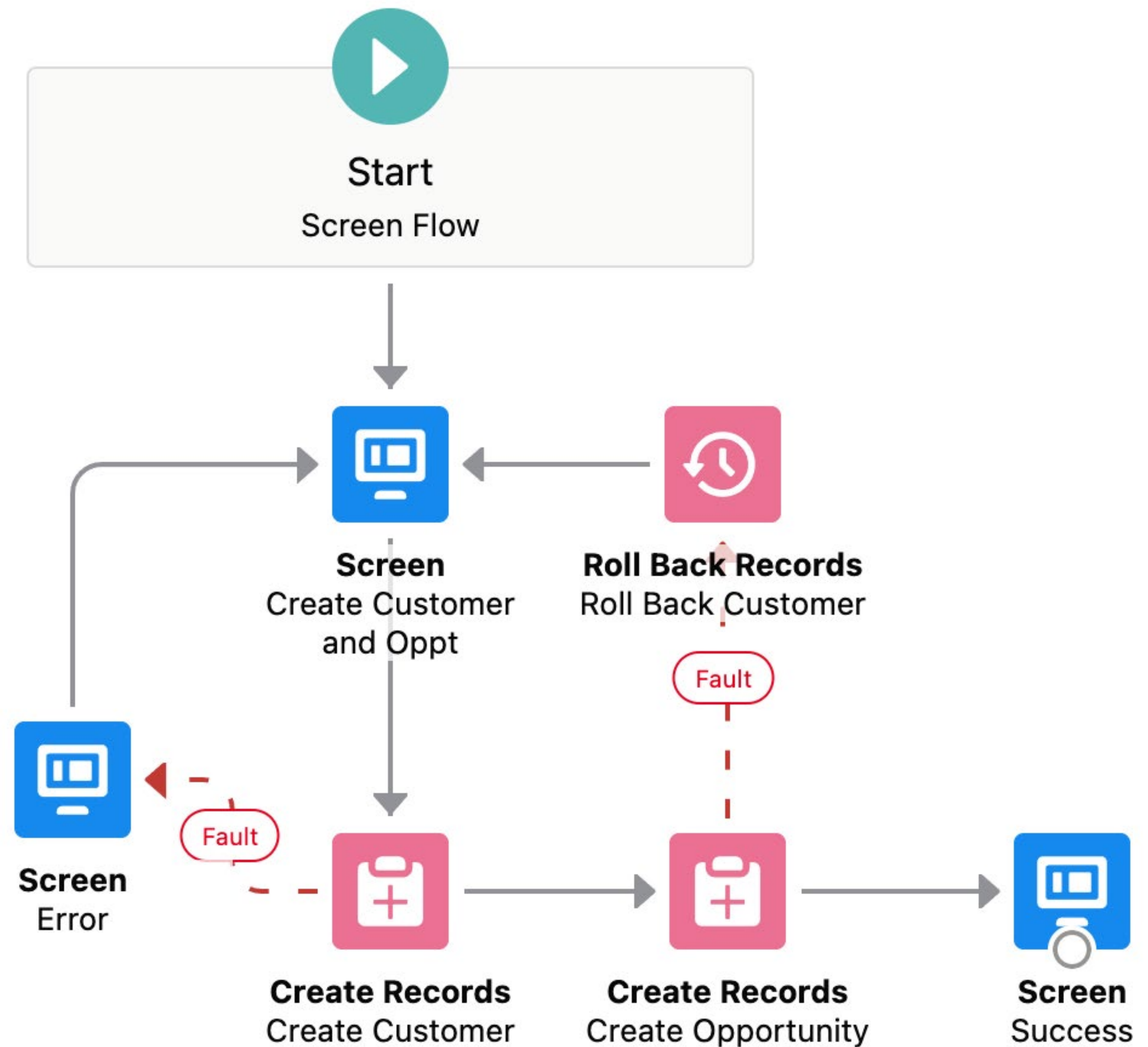
Flow Orchestrator (Beta)

Another significant flow enhancement that gives admins the power to automate complex processes without writing any code. More precisely, admins can now combine automated processes in a single interface and transform flows into steps organized by stages. There is now more flexibility to create approval processes, better ability to assign work to any Salesforce user, and more control over record lifecycles. What is more, you can use the Flow Orchestrator Work Guide to display assigned work items on relevant records so that users can see and complete their assigned work without wasting time switching between tools.
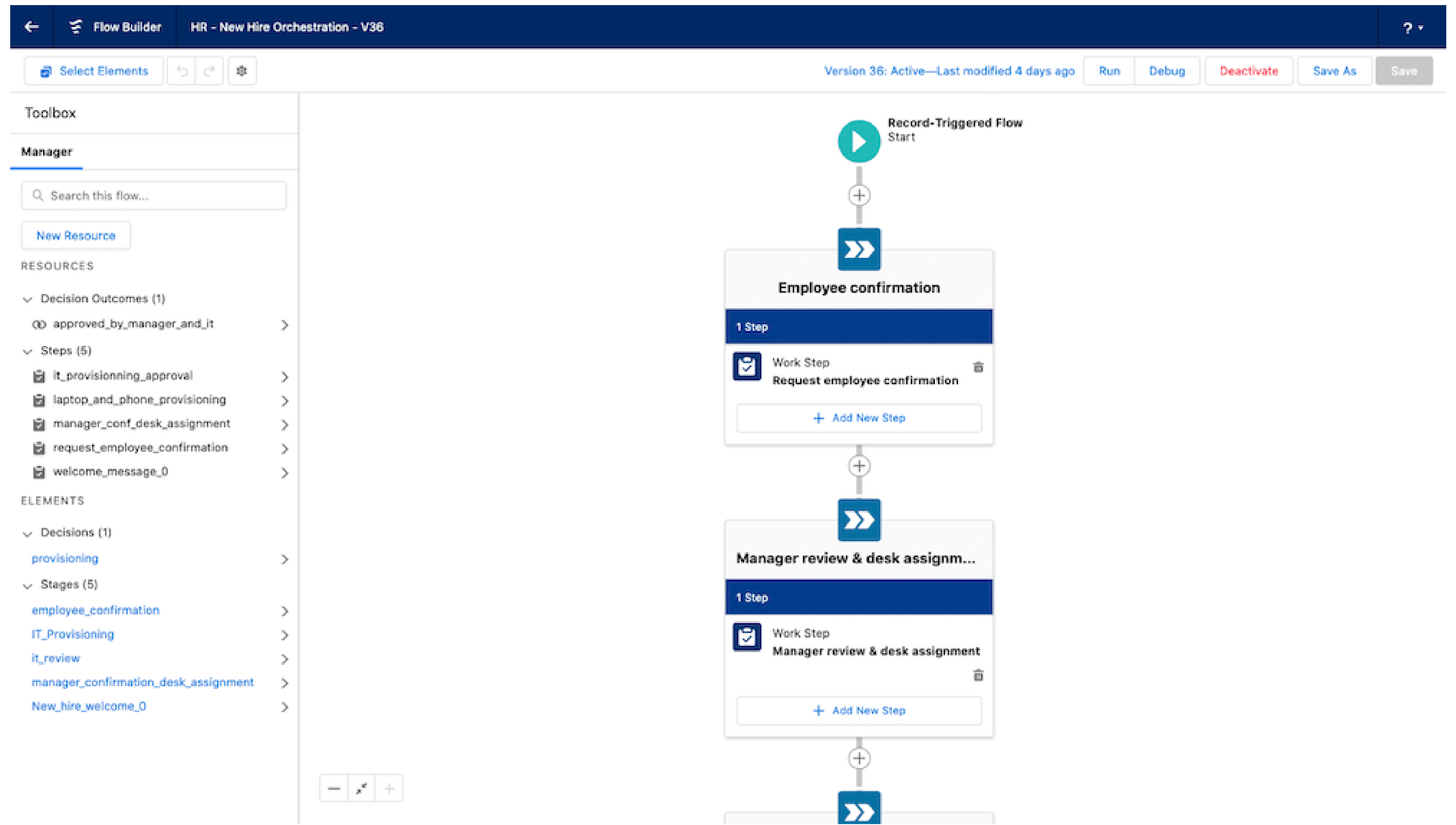
Dynamic Interactions in Lightning Pages

You thought that filtering component visibility in Lightning Pages was cool? Wait until you see what you can do with Dynamic Interactions! What exactly is this new feature? Via dynamic interactions you can wire components together. For example, let's assume that you have a list of customers on your screen and two additional components; a map for the address and the customer detail. When clicking on the different customers in the list, a signal is sent to the map and customer details component to show the customer that you just clicked. Dynamic interactions is the link between the components and when you click on a record on one component, a signal is sent to the other components on the screen.

To see this functionality in action, please click here.

"We highlighted a lot of new features. I can really imagine that you would like to have more insides in the details or how it will fit in your organisation. Please don't hesitate to contact me or one of my colleagues for more information."

Read on →

Salesforce Functions

Salesforce Functions empower teams to focus on developing apps and business logic fast instead of managing infrastructure. You now have the option to use additional programming languages and third-party frameworks, saving development time and effort.

A great way of using functions is by offloading logic from Apex to functions. In case you are hitting Apex compute limits, a Salesforce Function can help out. As in a Function you can make use of elastic auto-scaling in Salesforce Functions compute environments.

An example of using Salesforce functions can be for instance, calculating a nearest result when being provided with a longitude and latitude in a large list of locations.

This is typically not possible with apex and should be done off platform. With Salesforce Functions, this can be all done on the same org and doesn't require to set-up extra infrastructure or tooling to achieve this functionality.

Einstein Vision

In the Winter '22 release Einstein Vision received an update enhancing the following features.

Images with Multiple tables on a page
You can now process images that contain a mix of tables on a single page. Previously, only one table was permitted. Use Einstein OCR to read tabular data from an image.

Detect Text in PDFs with Einstein OCR
Now Einstein OCR can also be used in PDF files.

Additional Features

Additionally we have three new features we would like to highlight:

Get Started Instantly in the Salesforce Mobile App
End users can personalize the landing page in the mobile app. Via Mobile Home you can add and remove cards.

Become Salesforce Experts Fast
Guidance Center now gives you more resources to help you become an awesome admin.

Search Faster and Smarter
The new Einstein Search is the Lightning's default Global Search Experience.

Salesforce Data Hub

Luuk Martens
Practice Manager
Data & Analytics

Tatiana Mashliak,
Consultant Data &
Analytics

Teun Gilissen,
Consultant Data &
Analytics

Darren Aletoe,
Consultant Data &
Analytics

Jaïro Martha,
Senior Consultant
Data & Analytics

For too long analytics has been a skill for specific people in the business, and self service BI has failed many organisations. Now, the time has come to truly start working on analytics for everyone. In these Winter '22 releases we see a bunch of new features that caught our attention within all the data analytics products Salesforce offers: Tableau CRM, Einstein discovery, Tableau, and Snowflake.

All of them become more actionable, interactive, and more connected to Salesforce itself. We are happy to present the most interesting updates that help you to become even more data-driven.

Chapter topics

> Enrich Tooltips in Tableau CRM

> Make Data Transformations in Tableau CRM Smarter

> Sentiment Analysis of Unstructured Data in Einstein Discovery

> Sentiment Analysis of Unstructured Data in Einstein Discovery

> Updates from Latest Tableau Release

> Unstructured Data Support in Snowflake

Read on →

"Analytics for everyone' requires radically different thinking than usual. Salesforce and Nextview will drive that true merger of Business Intelligence with Business Applications."

Enrich Tooltips in Tableau CRM

Tooltip is a very powerful feature in designing dashboards. It helps to enrich your dashboard with new insights without using complex visualizations. In addition to custom text and legend, tooltips can have charts, tables, or even components. For example, a chart with order income by account can be enriched with a detailed table about this account to see all the relevant information about it. Now dashboards can be more user-friendly and not overwhelmed with charts so that performance improves significantly.
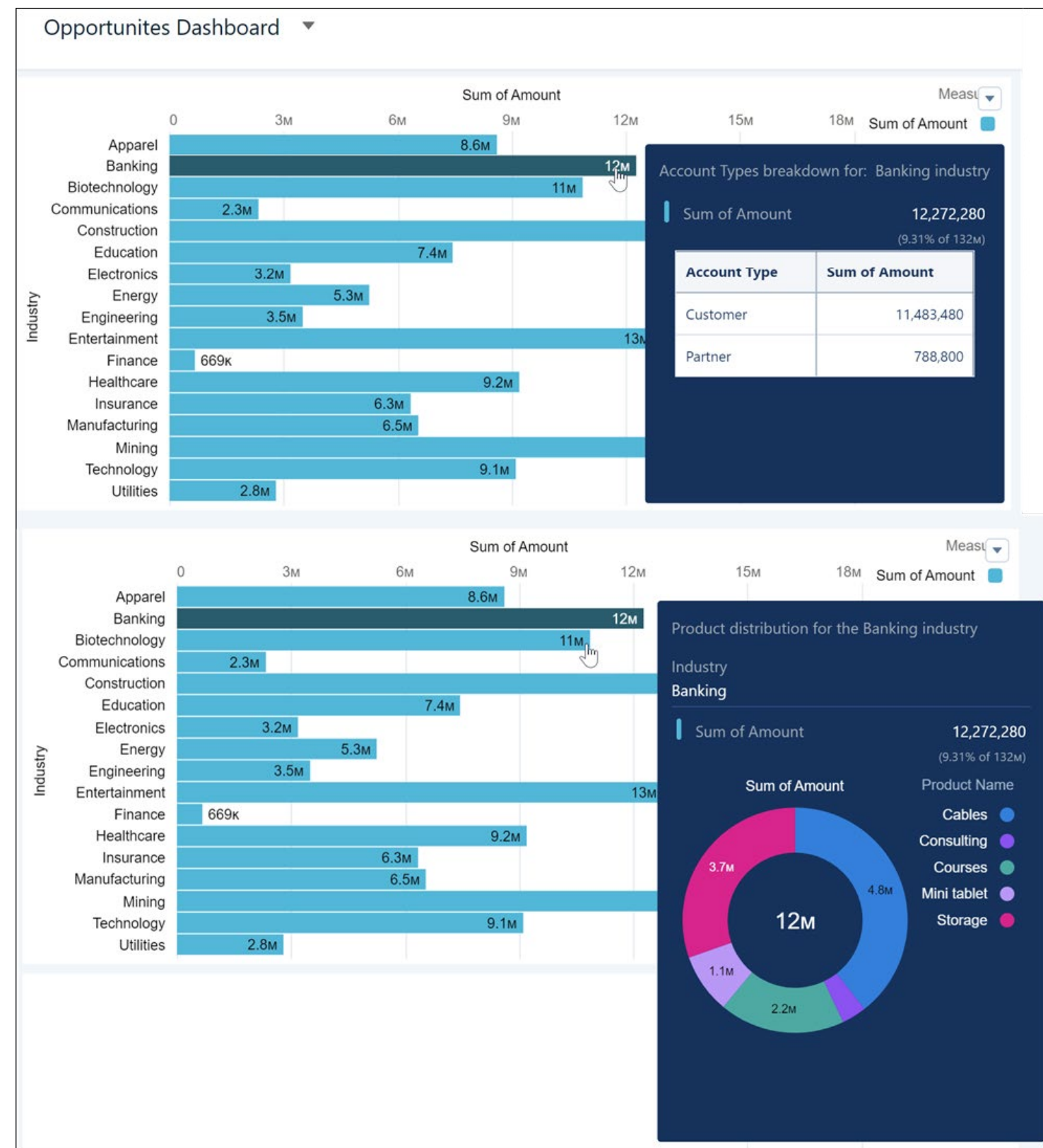
"Tooltip is a perfect addition to the dashboard functionality. Now a full picture of the analysis is available in one glance within one widget, making the dashboard even more actionable and user-friendly."

Make Data Transformations in Tableau CRM Smarter

Data Prep (or recipe) got a lot of new features - now data transformation becomes much smarter and easier to use. We summarize them in one glance overview.
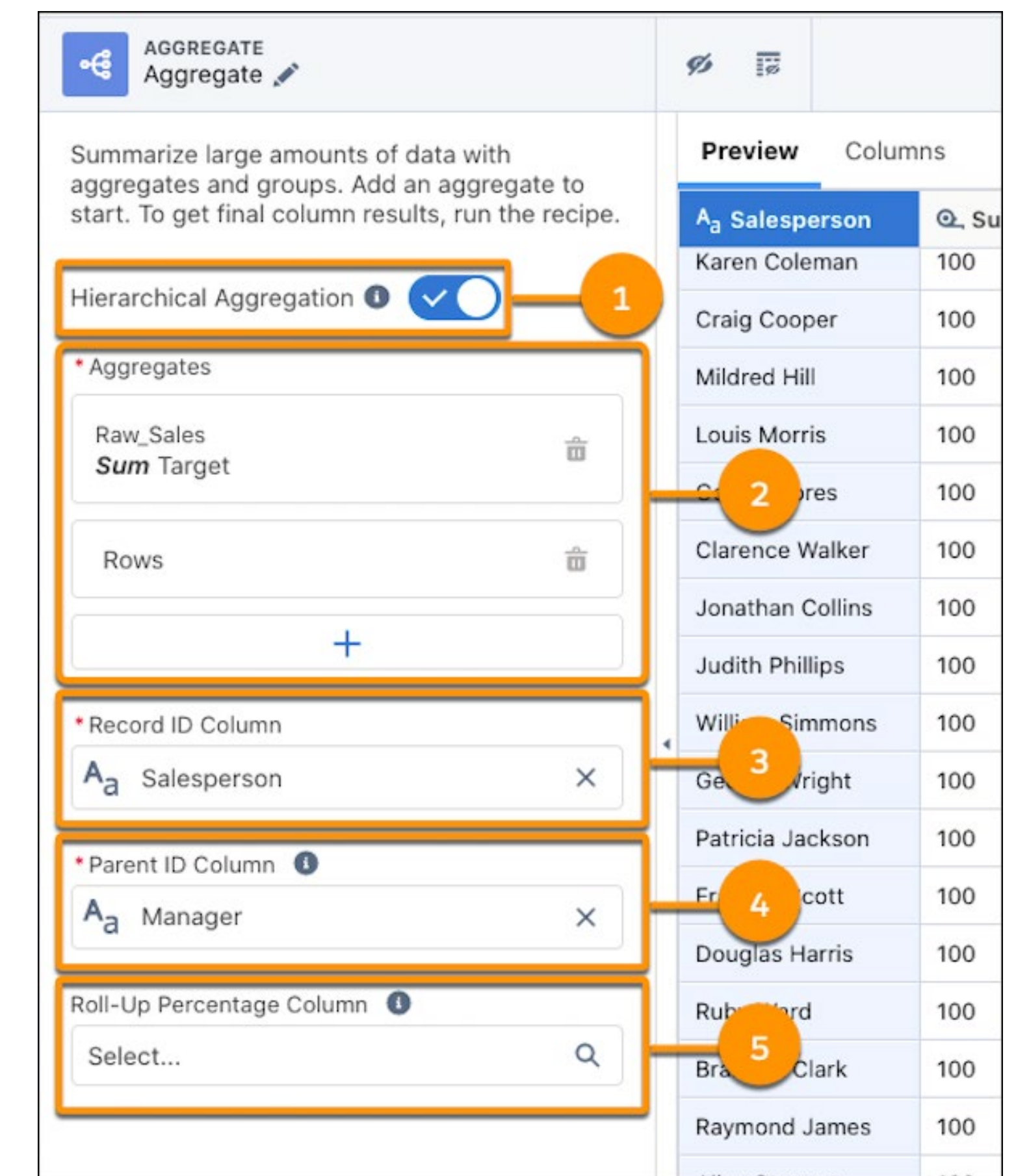
a) We love **buckets in Data Prep** (it gives us nostalgia for Salesforce Standard Reporting), and new possibilities of it sound amazing: Fuzzy matching handles different spelling in the similar names of the groups like capitalization and pluralization. Developer can customize the algorithm for the best results in one click - no more manual adjustments of the values while bucketing. Even more saved time for the developer and for the project!
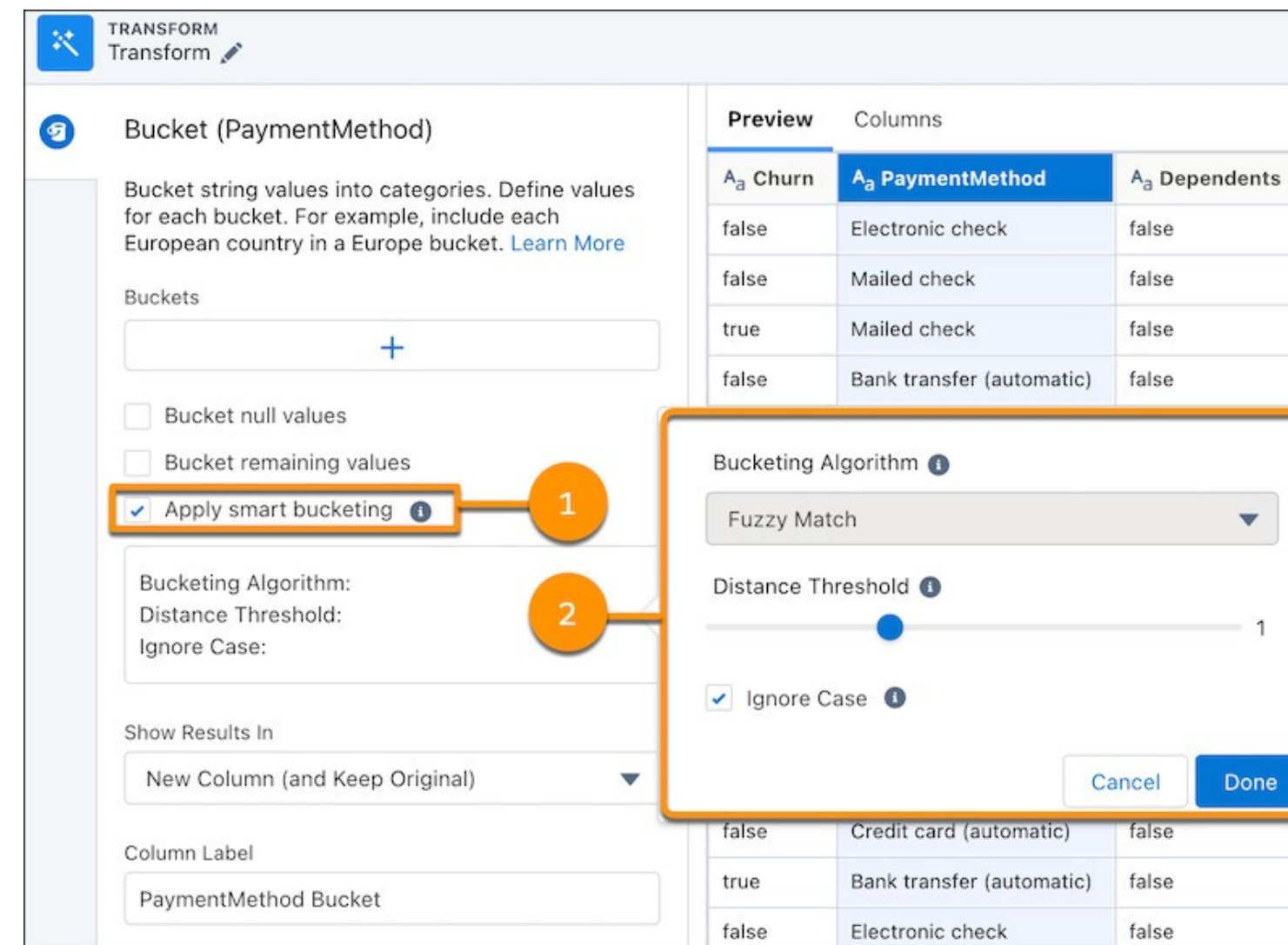
B) We've already spoken about **clustering** last time. This machine learning technique classifies records that have comparable properties, for example, clusters identify groups of customers based on their country and number of employees. You could customize the number of clusters yourself. Data Prep then detects the optional number of clusters within the selected value.

c) Another feature that reduces manual calculations is hierarchical roll-up: aggregation can be performed on multilevel data and be based on hierarchy relations between columns. The most common

use case is role hierarchy - for example, calculate revenue per team and region by rolling sales reps up to management level. Before this requirement could only be done using complex data transformations. Now it becomes one-click action!

"New data transformations functionally in Data Prep is not only about saved resources. It is also about the ability to perform complex calculations, improve maintenance and data quality by removing manual adjustments."

Sentiment Analysis of Unstructured Data in Einstein Discovery

Your organization owns a lot of unstructured data - information or feedback that has been collected from customers, suppliers, employees, or other relevant stakeholders **as rich text**. As a lot of effort and resources are required to analyze this type of data, it often remains unused. This is a missed opportunity to achieve a deep understanding of what is going on in your organization. For instance, unstructured data can be analyzed to understand how people respond to a new product, campaign, or branding, or how existing offerings can be improved. If analyzed properly, it can also be used to predict customer trends.

In the Winter '22 release, a new feature will become available in Einstein Discovery to process this kind of unstructured data. Using Sentiment Analysis, users will be able to classify the sentiment of data as positive, neutral, or negative to understand emotions associated with the response. For instance, "The customer service representative was of great help" is positive, "The processing time of my order was OK" is neutral, and "I'm not in favor of the latest update" is negative. Sentiment analysis can be added and processed during story creation. In your **story settings**, select the variable that contains the unstructured data. Click the **Transform** dropdown menu and select **Sentiment Analysis.**

"The applications of Sentiment Analysis for organizations are plenty and diverse. The feature can help to eliminate guesswork and to really understand key aspects of your organization."

Predict Outcomes for Multiple Categories in Discovery (Pilot)

We know Einstein Discovery as the on-call data scientist that helps to quickly analyze data and detect patterns using the power of machine learning, artificial intelligence (AI), and statistical analysis. Einstein Discovery also allows you to use this data to predict outcomes that are relevant to your organization. Currently, Einstein Discovery is able to predict numerical outcomes like percentage, amount, or duration, and binary outcomes such as churned or not churned, opportunity won or lost, and retained or not retained.

As of the Salesforce Winter '22 release, a pilot is being tested to also include multiclass models. With multiclass models, you can predict probable outcomes for 3 up to 10 categories. For instance, an organization can predict what Service Level Agreement out of 5 offerings a customer is most likely to purchase. To create a multiclass prediction model, select a text column that contains 3-10 categories during story creation.

After the story has been created, what-if scenarios can be tested to predict the most likely category. Select one or more model features (1) to predict the most likely outcome (2) as well as the ranked probabilities (3). You can assess the model accuracy (4) and top predictors in this model (5) as well.
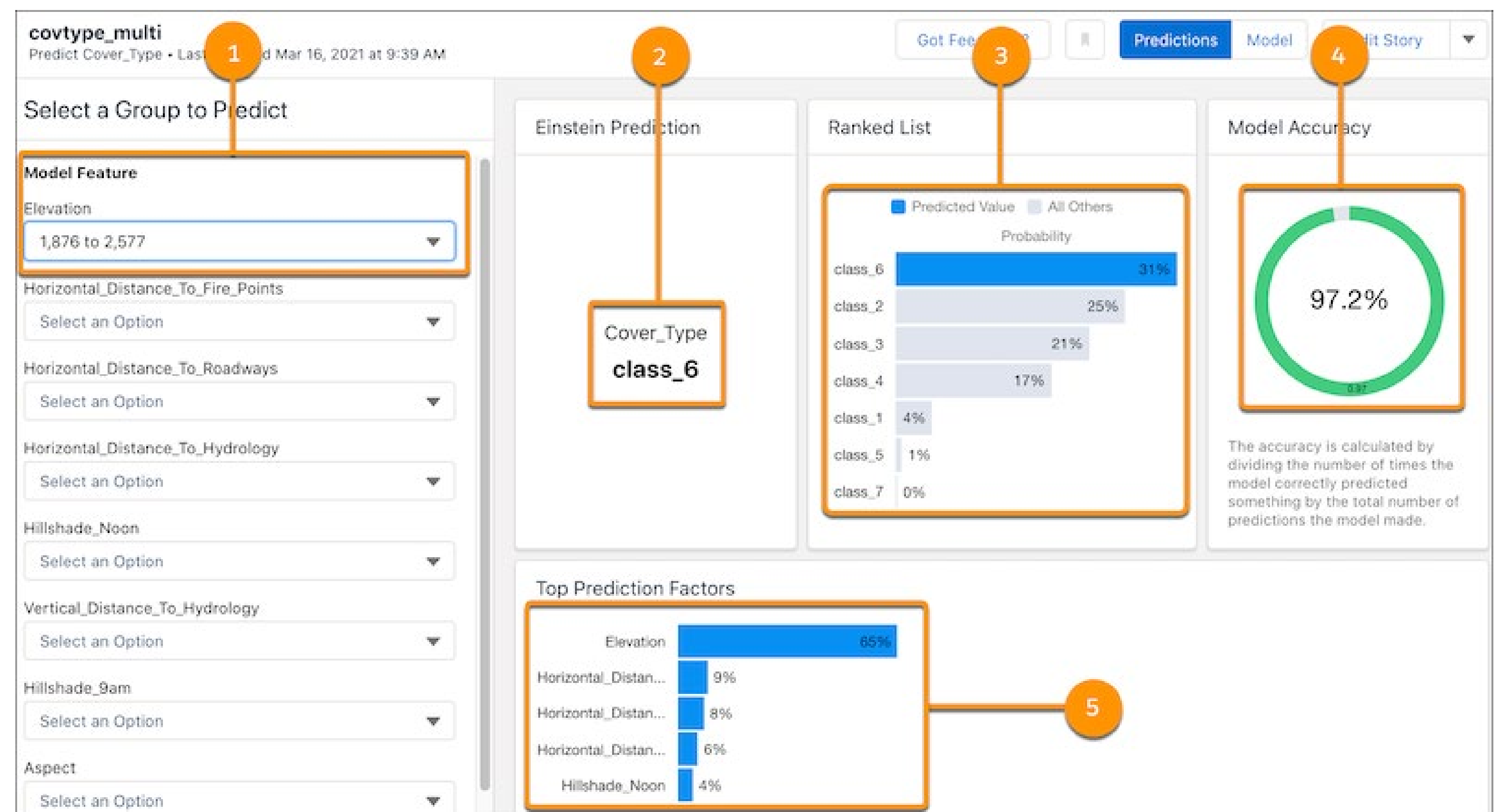
The Confusion Matrix shows how accurately the model predicts each category. The darker the diagonal, the higher the percentage of true positives is indicating a more accurate model.
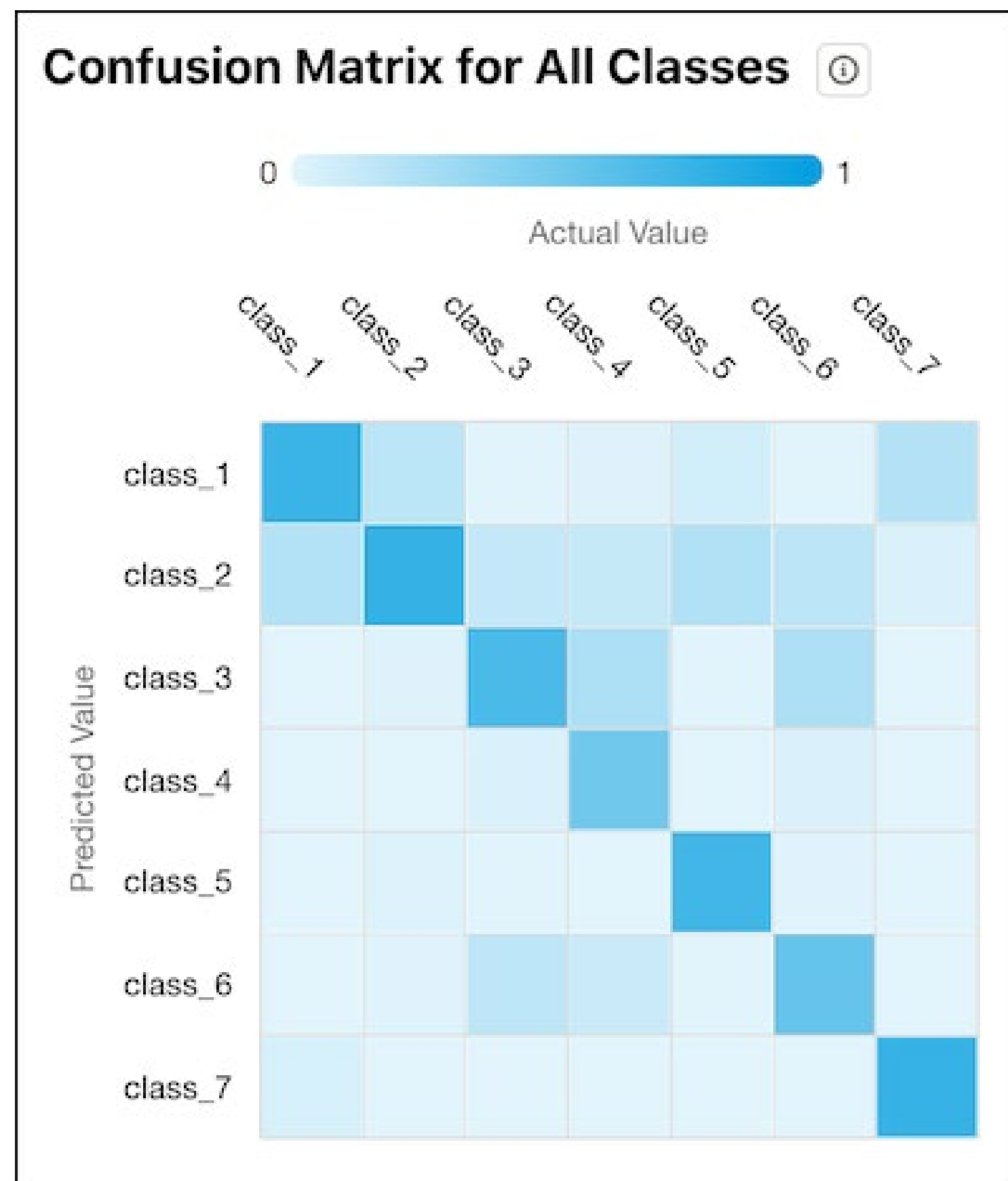
"With the introduction of multiclass models more complex scenarios, like those in which the answer is not simply a yes or no, can be predicted - a welcome addition to the use cases that Einstein Discovery already offered."

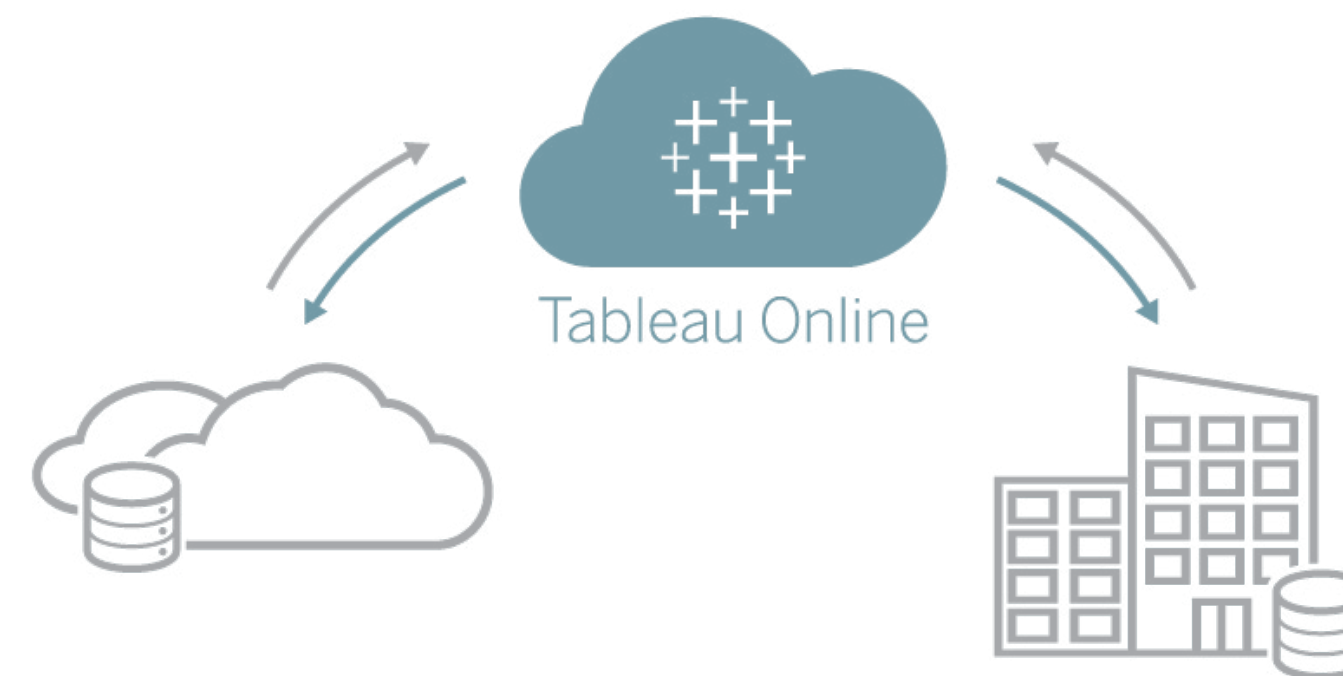Read on →

Updates from Latest Tableau Release

Within days of the Salesforce Winter 22' release, Tableau has released its 2021.3 update. And we found some of the new features really exciting!

A) Now Tableau supports SOQL: you can connect to Salesforce directly and use the SQL of Salesforce: SOQL (Salesforce Object Query Language). This means that all data-savvy Trailblazers will have no trouble querying Salesforce data in Tableau the way they are used to. Yet again a great feature to support the further integration between Tableau and Salesforce.

B) As mentioned in a previous release paper Tableau is rapidly improving its web authoring capabilities. In this release, Tableau Online expanded the customization of visualizations and dashboards by implementing the new workbook formatting pane and improved browser formula authoring capabilities.


```
Edit Custom SQL                                    ✕
SELECT Id,
AccountId,
Name,
Description,
StageName,
Amount,
Probability,
CloseDate,
Type,
NextStep,
LeadSource,
ForecastCategoryName,
Opportunity.Account.Name
FROM Opportunity




Preview Results...   Insert Parameter ▼        OK    Cancel
```

C) With the recent acquisition of Slack by Salesforce, we expect a lot of exciting new features to be added in upcoming releases. In this Tableau release, it will be possible to get notifications in Slack when a colleague shares content with you. In addition, when @mentioning in Tableau comments you can now get notified directly in Slack, which will allow for even faster collaboration.

"The mission of Tableau is to help people see and understand data. With the continued improvements of Tableau and its integration with the rest of the Salesforce Ecosystem, this mission is becoming easier to achieve for many companies!"
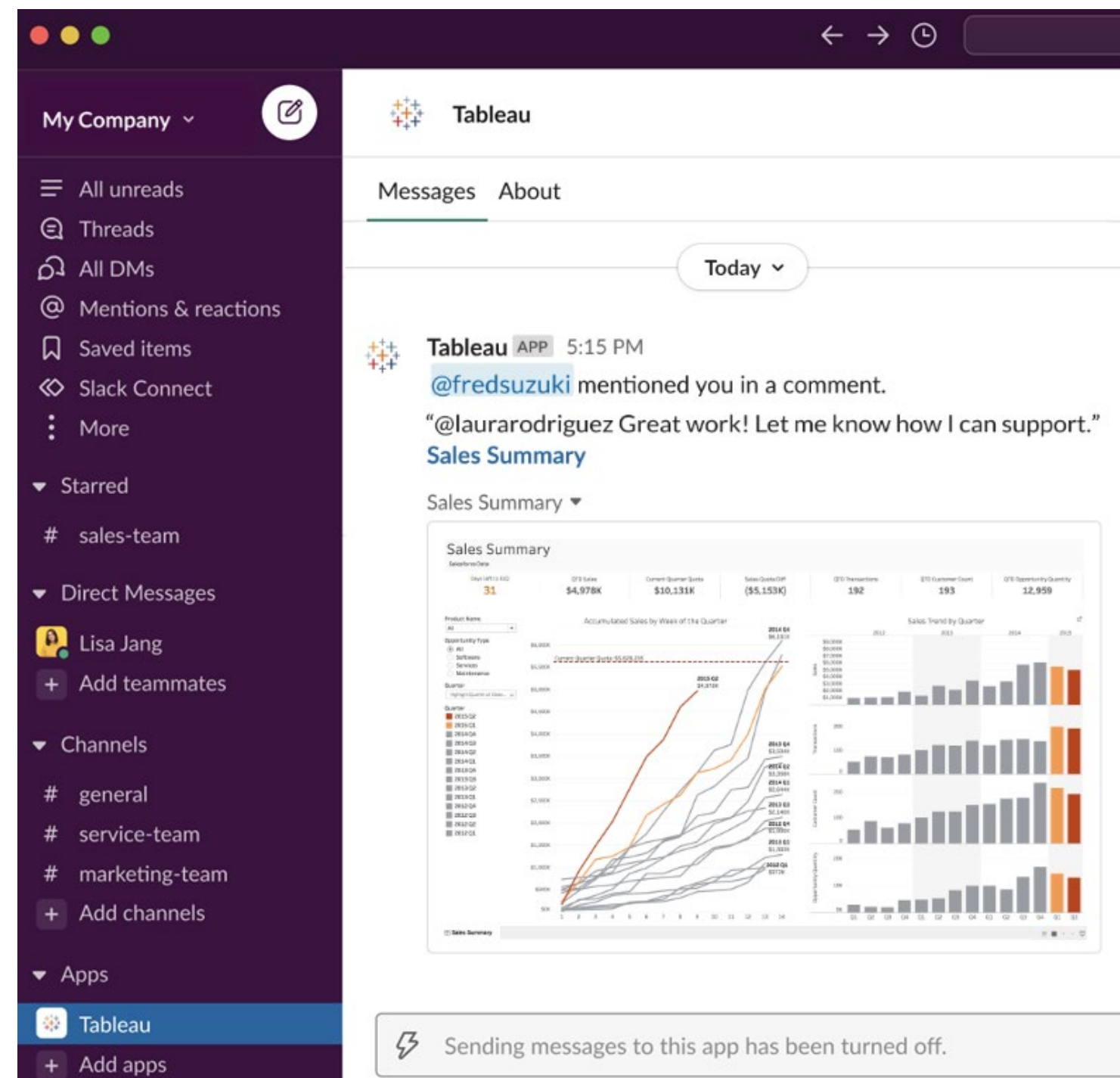
Read on →

Unstructured Data Support in Snowflake

We are excited to see Snowflakes's announcement of unstructured data support (in preview). Unstructured data contains data points that would not fit into a table e.g. text documents, images, audio, video, pdf documents, or ppt presentations. To access them we typically have to traverse different applications and perform different tasks to get the data in a structure that is fit to convert to information. With this new release, you will be able to access your unstructured data right through Snowflake.

With the introduction of unstructured data hosting, you can store your unstructured data in external stages on the storage platform. You can then use internal or external functions to load and process that data in Snowflake. The valuable information extracted from that picture, pdf doc, or scan can then be stored in tables and afterward used to expand your already structured data set, bringing you more insights, and process improvement opportunities.

On the 22nd of September, Snowflake had their EMEA Financial services summit. Headlining the summit was the launch of Snowflake's Financial Services Data Cloud. This is a Snowflake platform for the secure sharing of financial data aiming to break away silos and push financial companies forward in the data era. To view the recordings on the Financial Services Summit please visit Snowflake's website: www.snowflake.com/ financial-services-data-summit/

Read on →

nextview

To read all Release Papers,
please click here

Salesforce
Release Paper