

**nextview...**

Salesforce **Release Paper**

**Winter**

**2023**

# Salesforce Release Paper Winter '23



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**Huub Waterval**  
CEO Nextview

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**Huub Waterval**  
CEO Nextview

# Dear Trailblazer,

**What an amazing year we had! Breaking all records with nominations in no less than ten categories, we are incredibly proud to have won the Manufacturing & Equality Excellence Salesforce Partner Awards. Becoming a great place to work for the sixth time in a row.**

We do our efforts toward an equal and sustainable world, which we aim to achieve with commitments to the 1-1-1 Pledge and the United Nations Global Compact, and partnerships with Techgrounds and Refugeeforce, among others. But also in new partnerships.

Stepping into the world of esports, we recently decided to become the main sponsor and partner of award-winning sim racing team Burst Esport from Denmark, with leading drivers from Europe - an exciting and fitting step for us as a certified B-corp. On top of that, we continue to grow in both the Netherlands and Germany. And our partnerships with Salesforce, MuleSoft, Tableau, and Slack are stronger than ever.

We are also proud to announce that Nextview Consulting welcomes Mooza to scale and deepen expertise across the Salesforce platform in Europe!

The acquisition builds on Nextview Consulting's continued investment in Salesforce consulting services to meet the increasing demand for experience-led digital business transformation and human change strategies backed by the Salesforce platform, Mulesoft, Tableau, and Slack.

With another promising year to come, we are eager to share with you the most exciting new Salesforce possibilities. Feel free to contact us for a 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](#) →



**Lowie te Riele**  
Salesforce  
Consultant



**Paula de Amicis**  
Salesforce  
Consultant

# Service Cloud

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**Though Summer has hardly come to an end and the sun is still shining, we would like to take you with us to the next Salesforce release, which is scheduled for Winter '23. We will dive into new features enhancing your messaging experience, the Voice Setup process, workforce planning, and the possibility to inform customers in mass during an incident in your Salesforce Environment.**

## Chapter topics

- > Enhance the Messaging Experience With New Available Capabilities
- > Streamlined Service Cloud Voice Setup Process
- > Optimized Workforce Planning
- > Sharing Incident Updates With Customers in Mass

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Read on →

“Implement Service Cloud Voice faster with the new streamlined setup process.”

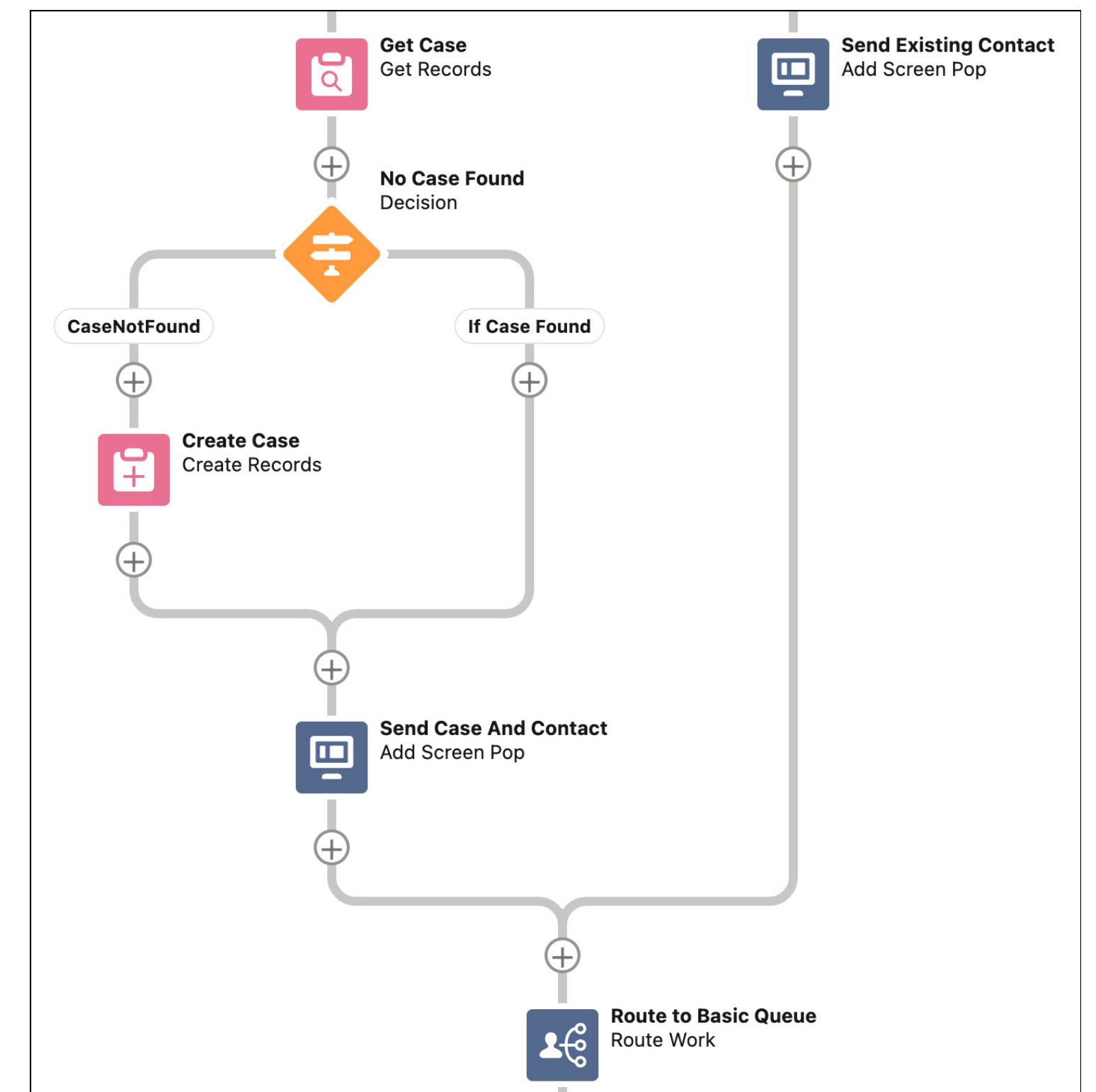
[Read on](#) →

## Enhance the Messaging Experience With New Available Capabilities

Within the new Messaging capabilities, it is possible to designate a certain amount of time for agents to wrap up their work before they jump into the next Messaging session. Reduce agent's response time with Quick Text, in which you insert pre-written greetings and answers to frequently asked questions, and build your customer's trust by setting their expectation, telling them how many minutes they will wait before being connected to an agent.

## Streamlined Service Cloud Voice Setup Process

Save time setting up Service Cloud Voice with this Winter '23 release. When you create a contact center, Salesforce automatically provides the AWS quick connection used for voice call transfers to Omni-Channel flows. Within a few clicks, you can import Amazon Connect queues and their memberships into your contact center. Setting up routing logic is easier by using the Basic Routing Omni-Channel Flow with Case Creation template. The template identifies the caller, creates a case for the call, and once an agent accepts it, the new case record will be displayed.



Read on →

## Optimized Workforce Planning

Salesforce makes it easy to optimize planning for your agents by giving you the ability to understand workload and staff needs, based on your contact centers' time zone. Instead of showing time values in UTC (Coordinated Universal Time), Workforce Engagement uses the time zone of the workload history's service territory. Availability Rule Options helps you identify agents for the shift assignments by choosing to consider agents' absences and working hours. Give your agents some downtime between their shift assignments by creating a Rest Time in Minutes Scheduling Rule.

## Sharing Incident Updates With Customers in Mass

With Broadcast Communications it is now possible to inform customers in mass during an incident happening in your Salesforce Environment. Teams that deal with incidents can now send timely progress reports to customers in mass via broadcast emails directly from the record of the incident! By placing broadcast site banners you can make sure customer cases are deflected by alerting the visitors of your Experience Builder sites of the ongoing incident(s). This will save your employees time in going through new cases about the same incident and builds trust with your customers as they know you are on top of the incident(s)!

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[Read on](#) →



**Jeffrey Schmidt**  
Senior Field Service  
Consultant

# Salesforce Field Service

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**Two of our favorite functionalities now even got better. With this Winter '23 release, you can set up two-way video sessions with Visual Remote Assistant. Also, the Field Service mobile app now has an enhanced overview screen and quicker image uploads. Enough to get excited about!**

## **Chapter topics**

- > Enhanced Visual Remote Assistant
- > Field Service Mobile

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**Read on** →



“This release shows a lot of enhancements like scheduling and optimizing bundles of Service Appointments, but also new features like the Optimization Hub to explore the impact of optimization.”

[Read on](#) →

## Enhanced Visual Remote Assistant

The Visual Remote Assistant now got even better: set up a two-way video session with the customer, add free text to images, and customize your Terms of Service.

Whether you're in a sales call or troubleshooting to resolve customer issues, you can now boost your sales or improve collaboration with screen-sharing capabilities during a two-way video session. Both participants must be connected via a desktop for screen sharing.

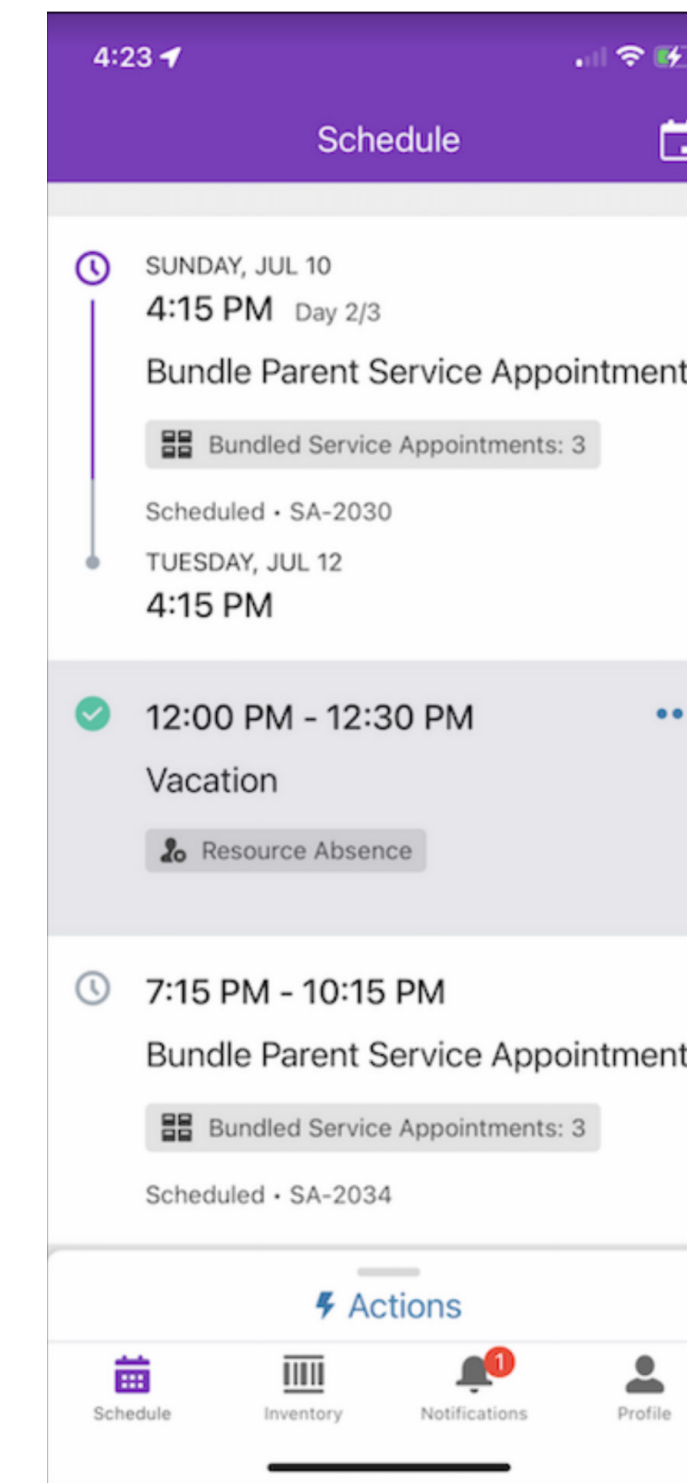
Add free text to images to classify, record, and track customer issues. You can add the text using the Visual Dashboard and afterward share the images with the customer. You can also add your own specifics to the Terms of Service. For example, to ensure customers understand the terms in their own language.

## Field Service Mobile

The Schedule tab can now be enhanced to not only show the work to be done but also the absences. Do more and wait less by optimizing image sizes for shorter upload times.

Create a unified view of the schedule by combining work and absences without switching tabs. You can choose to show the resource absences on the Schedule tab along with the Service Appointments. This feature is now generally available, including some updates to make the design between Android and iOS more consistent.

For mobile workers, it means they can do more with shorter upload times. Let the app resize images before uploading for less waiting time, especially in areas of low network connectivity.



n Attributes	
Attribute key	Attribute value
FSL_GOOGLE_MAPS	"true"
COMPANY_PROFILE_IMAGE_RESOURCE_NAME	"Company_Banner"
MAX_IMAGE_UPLOAD_SIZE	"500"

[Read on](#) →



**Shiwei Chen**  
Consultant



**Mille Bonekamp**  
Consultant



**Thomas Renkers**  
Consultant

# Experience Cloud

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**Salesforce is working hard to create the next generation of Experience Cloud technology. This release combines the functionality of Lightning Web Runtime (LWR) Sites and CMS Workspaces in one seamless application.**

## Chapter topics

- > Enhanced LWR Sites
- > CMS Workspaces Integration
- > Other Noteworthy Updates

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[Read on](#) →

“All in one - A seamless solution on Experience Cloud technology.”

[Read on](#) →

## Enhanced LWR Sites

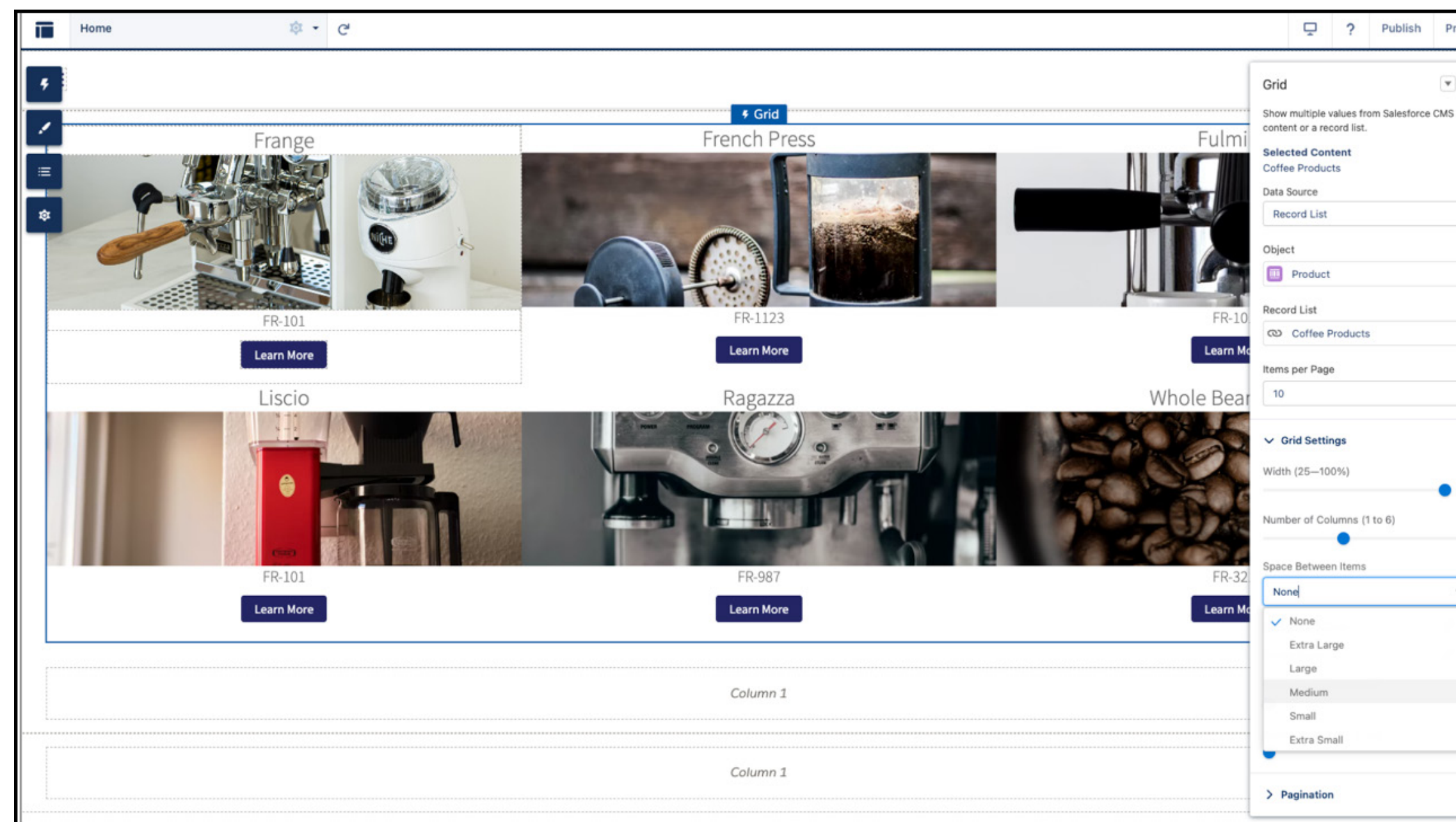
Salesforce continues to develop the functionality of LWR Sites for both end-users and developers alike. With the Winter '23 release, it is now possible to expand the scope of the Search functionality to an even broader range of sources and allow end-users to find exactly what they are looking for. For developers, there are several quality-of-life features that should decrease overhead and time to market.

## CMS Workspaces Integration

Managing content becomes even more user-friendly. CMS Workspaces can differentiate between internal and external information, different geographies, or even different campaigns. CMS Workspaces also help control access to the content. Salesforce provides several improvements to how you can create and manage (collections of) content. We are most excited about the simplified options for creating and managing translated content.

## Other Noteworthy Updates

There are miscellaneous other updates coming with the new release, we highlight a few. Firstly, by popular demand, newly created LWR Sites no longer include '/s' at the end of their URLs. Secondly, you can now track user engagement with Google Analytics 4, which is generally available to Experience Cloud sites. Last but not least, performance for Guest Users is improved by caching images and Apex Methods (code).



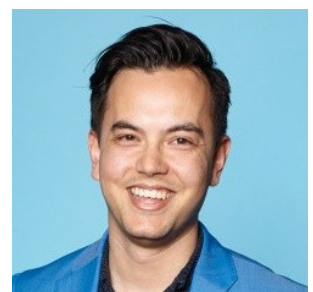
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**Nikolaj Kiepe**  
Industry Lead  
Financial Services



**Ewa de Vries**  
Salesforce  
Consultant



**Pascale Lafleur**  
Business  
Consultant



**David van der Meer**  
Industry Architect  
Financial Services

# Financial Services Cloud

**With this Winter '23 release, Salesforce is making all of you who are working in the Financial Services Industry even happier Salesforce users as they are adding some very useful functionalities. In Banking the subject of compliance gets a positive push with the new KYC and identity verification capabilities. At Nextview we are very happy to see this innovation happening!**

Other nice goodies in this release are for example some new additions to ARC and Interest Tags, the ability to configure the group household builder, a new FlexCard-based Policy 360 component for Insurance, and new Churn analytics templates for Wealth Management and Retail Banking. Let's take a look at some of these.

## Chapter topics

- > Verification of Caller Identity for FSC
  - > Verify Your Financial Caller's Identity
  - > Verify Both Authorized Representatives and Customers
  - > Extend Your Identity Verification Flows by Using Custom Flow Screen Components
  - > Use External Data to Verify Caller Identity
  - > Translate Custom Field Labels for Global Users
  - > Get Caller Identity Verification Up and Running with Ease
- > KYC process
- > Configure the Group Builder Edit Window

[Read on](#) →

“We will highlight three changes we struggled with during previous FSC implementations and are glad to see changed: KYC, identity verification of callers, and a small change in the group household builder.”

[Read on](#) →

## Verification of Caller Identity for FSC

It is now possible to set up flows that users of a bank or insurance company can use to verify whom they are talking to, and that can also be set up for authorized representatives such as legal guardians, legal parties, etc. You can verify the identity of a caller before sharing any sensitive information with them, thus keeping your customers' trust and protecting their personal information related to your financial services institution. If needed, it is even possible to verify a caller's identity using external data.

- **Verify Your Financial Caller's Identity**

The verification flow template guides bankers and advisors through the process of verifying a caller's identity. The template also updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the verification details, such as who participated in the call and what the call was about. You can use both text-based and object-based types of search with this flow template.

- **Verify Both Authorized Representatives and Customers**

If a representative is authorized to inquire about customer information, the banker verifies the identities of both the representative and the customer. Use the Verify Customer Identity flow to verify the representative and the Verify Linked Caller Identity flow to verify the customer. This template too updates Engagement Interaction, Engagement Attendee, and Engagement Topic records based on the verification details, and entails both text-based and object-based types of search.

- **Extend Your Identity Verification Flows by Using Custom Flow Screen Components**

To create an identity verification flow, you have three flow screen components to enrich your users' flow screen interactions. If you create a flow using the Verify Customer Identity flow template, these screen components are by default present in the flow.

- **Use External Data to Verify Caller Identity**

Does the data required to verify a caller's identity reside in an external system, outside of Salesforce? No problem; you can now set up verification to search an external data source for caller records and verification data.

- **Translate Custom Field Labels for Global Users**

Customize Identity Verification fields to work with your verification process. Use the Translation Workbench to translate Identity Verification field labels that you customize so that bankers always see those labels in their preferred language.

- **Get Caller Identity Verification Up and Running with Ease**

Set up caller verification with a new guided setup. All setup steps are listed in one place, with related documentation readily available too. You can even verify your progress using the progress indicator.

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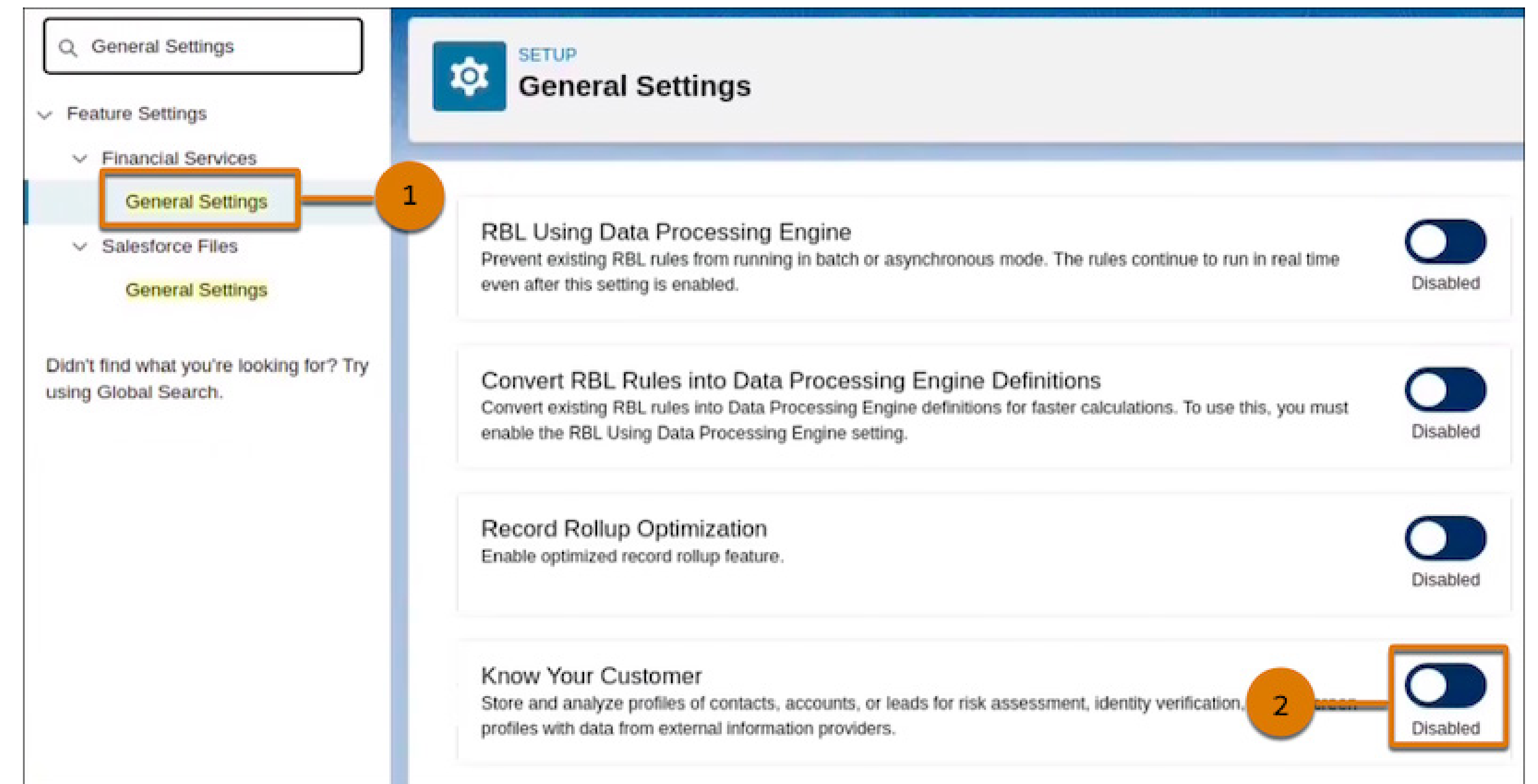
**"A long-needed change; standard out-of-the-box functionality for caller identity verification!"**

Read on →



## KYC process

Your users can now easily perform identity verification, risk assessment, and screening checks of parties. By using the new Know Your Customer (KYC) data model, your users can use data from external sources to verify documents submitted during an assessment, know more about a prospect, or categorize parties based on their risk assessment. Parties here can be accounts, contacts, or leads.



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**“Finally! A dedicated native Salesforce solution for KYC so you don't have to re-figure it out yourself and build it.”**

Read on →

## Configure the Group Builder Edit Window

Show your users the household and group data that are most relevant to them by configuring the Group Builder Edit window. You can easily show or hide sections in the window to let your users manage important customer relationships in a household or group. A nice feature to have!

The screenshot shows the 'Edit Smith Household' configuration window. It is divided into three main sections, each with a collapse/expand arrow on the left. The first section, 'Who are the members of this group?', includes a 'Primary Group' toggle (currently 'Enabled') and a table with two rows: 'John Smith' and 'Julie Smith'. The second section, 'How is this group related to other groups?', includes an 'Association' dropdown (set to 'Peer') and a table with one row: 'Lee Household' with a 'Business' role. The third section, 'Do the members have relationships with other accounts?', includes a 'Primary Group' toggle (currently 'Disabled') and a table with one row: 'Julie Smith' with an 'Institution 2' account. At the bottom, there are 'Back' and 'Save' buttons and a progress indicator.

**"A simple but long asked-for solution; we can now natively (without code) control and configure what users of Salesforce see in household groups!"**

[Read on](#) →



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



**Mille Bonekamp**  
Domain Lead  
(Field) Service  
in Manufacturing



**Dico Timmerman**  
Industry Lead  
Manufacturing

# Manufacturing

**Time is flying and the Winter '23 release is already around the corner. This release contains some interesting features and function updates in Manufacturing Cloud, which we will shed light on in the section below.**

To enable our clients in the setup of Manufacturing Cloud we developed an implementation quickstart for the Sales Agreements. Based on a selected combination of products and accounts, the Sales Agreements will be set up in 10 days, adding run-rate business to account-based forecasting.

To support the quickstart implementation, we have two additional Manufacturing Cloud accredited professionals in our team, Mille Bonekamp, and Paul van Alst. Mille and Paul bring the total in our Manufacturing team to three accredited professionals, ready to share their expertise for the benefit of your business.

## Chapter topics

- > Marketing & Sales
  - > Create Sales Agreements with Weekly Schedules
  - > Multiple Improvements on Filtering Within the Forecasts
- > Manufacturing for Service
  - > Excellent Customer Service via the Service Console
  - > New and Improved Service Components

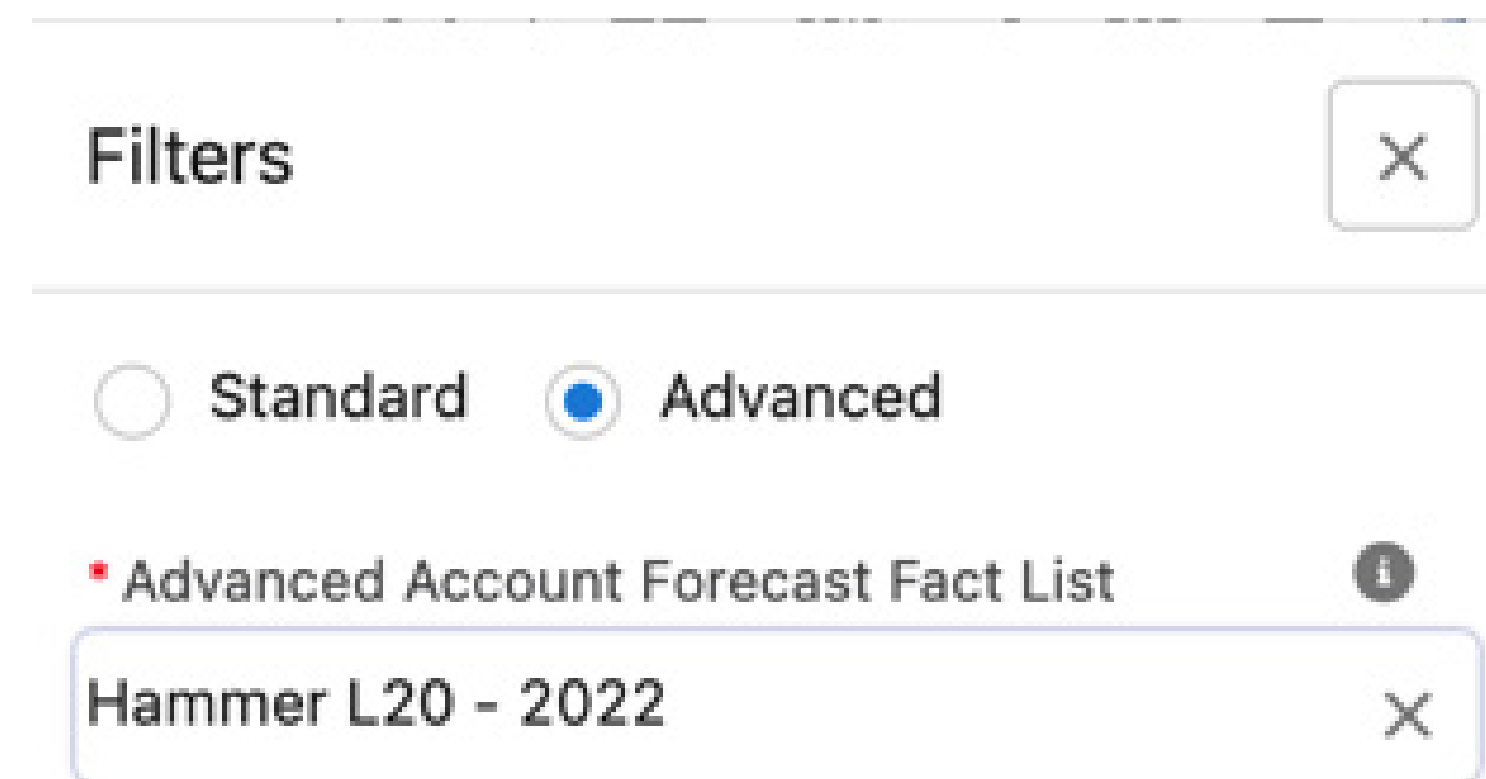
[Read on](#) →

## Create Sales Agreements with Weekly Schedules

In this release, the possibilities for schedule frequencies have been extended with weekly, which means you have one-time, weekly, monthly, quarterly, and yearly schedules in place.

## Multiple Improvements on Filtering Within the Forecasts

Winter '23 will show additional possibilities to filter your forecasts. Create a list view to group the records for the advanced filters. An example are the new advanced account forecasts which can be filtered by Period Start Date.



Next to these filter additions, the alerts are upgraded to get timely in-app notifications and email alerts.

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**“Focus is the right word for the Winter '23 release.”**

## Excellent Customer Service via the Service Console

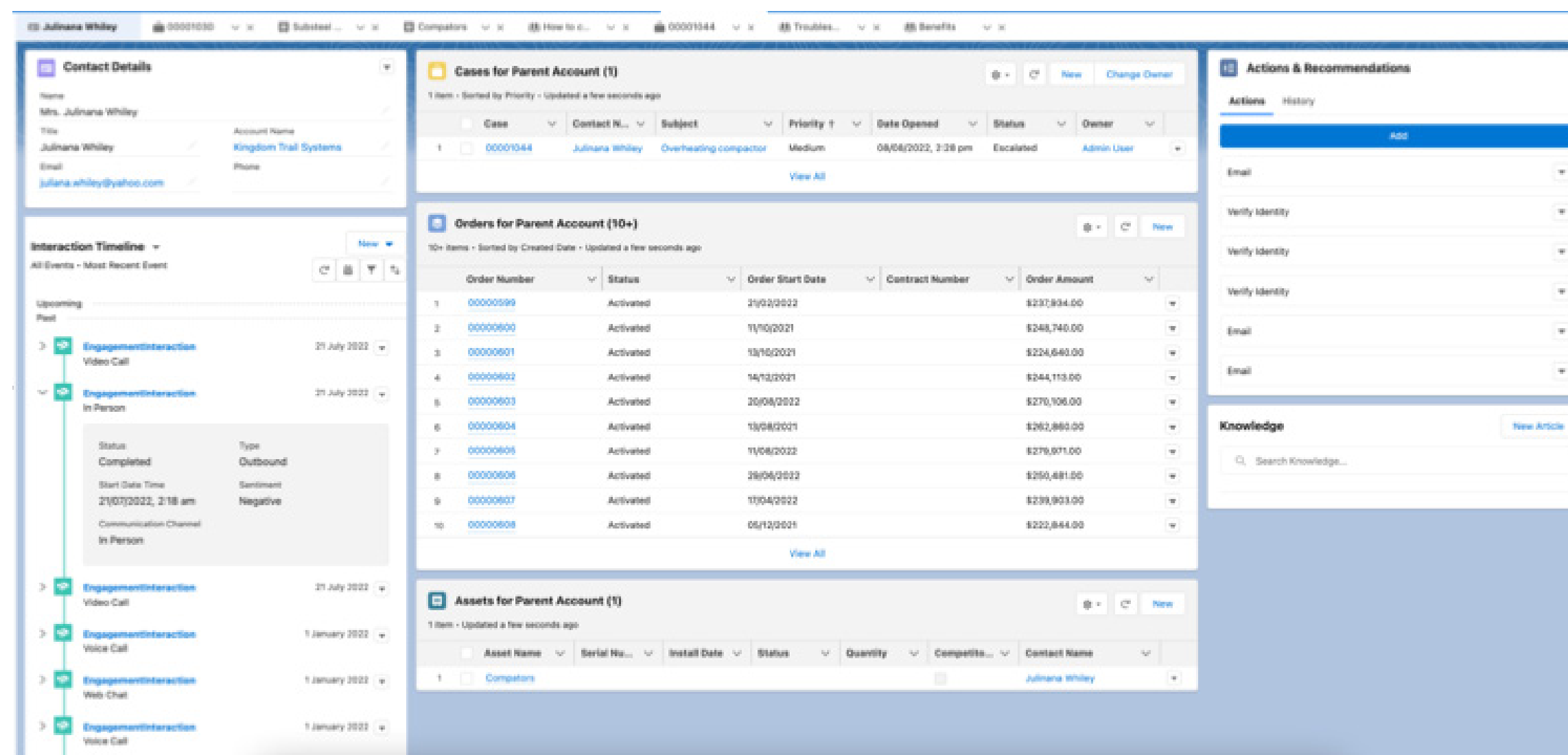
The service console can now be used in Manufacturing Cloud! Service teams have all the information available required to solve a customer's question. With components like Identity Verification, engagement timeline, and predefined lists of e.g. accounts or assets there is no need for users to look for this information elsewhere. It is all inside the service console.

**"Providing your customer with faster and safer service leads to a happy customer journey!"**

## New and improved Service Components

Along with the Service Console for Manufacturing come some wonderful component improvements. Flows, scripts, and actions can be reached right from the Action Launcher to help service teams act swiftly at all times. To increase privacy and security, the identify verification flow can now be accessed quickly via the Utility Bar and can be used for engagements initiated in-person, via OpenCTI, or Omni-Channel.

Via engagement interaction records and identity verification records, an Audit Trail now becomes available to review past actions with the Verify Identity component flow. All of these changes support the detection of potentially fraudulent activity or identity breaches, keeping your customers and their data safe!



Read on →



**Fawad Nizami**  
Salesforce  
Consultant

# Sales Cloud

**With this Winter '23 release, you can grow your accounts faster, find new customers faster, and close deals faster from anywhere through Salesforce and Sales Cloud for Slack. This also makes it easier for internal and external channels to collaborate with each other and close deals more quickly.**

In this release paper, you will also read about To Do List which is designed for tracking and sorting your tasks on the Sales Cloud platform. Revenue Cloud has improved Subscription Management which helps its users to manage their subscriptions by themselves, so sales teams can save their time and focus on more Sales.

Last but not least: Salesforce also improves the global sales experience and Salesforce Payments on your Commerce platform. Read on to learn more about it in detail.

## Chapter topics

- > Sharpen Your Pipeline Management
- > Organize Your To Do List
- > Collaborate with Slack and Sales Cloud
- > Improve the Global Sales Experience on Your Commerce Platform
- > Salesforce Payments for Your Commerce Platform
- > Improve Your Subscription Management on Revenue Cloud

Read on →

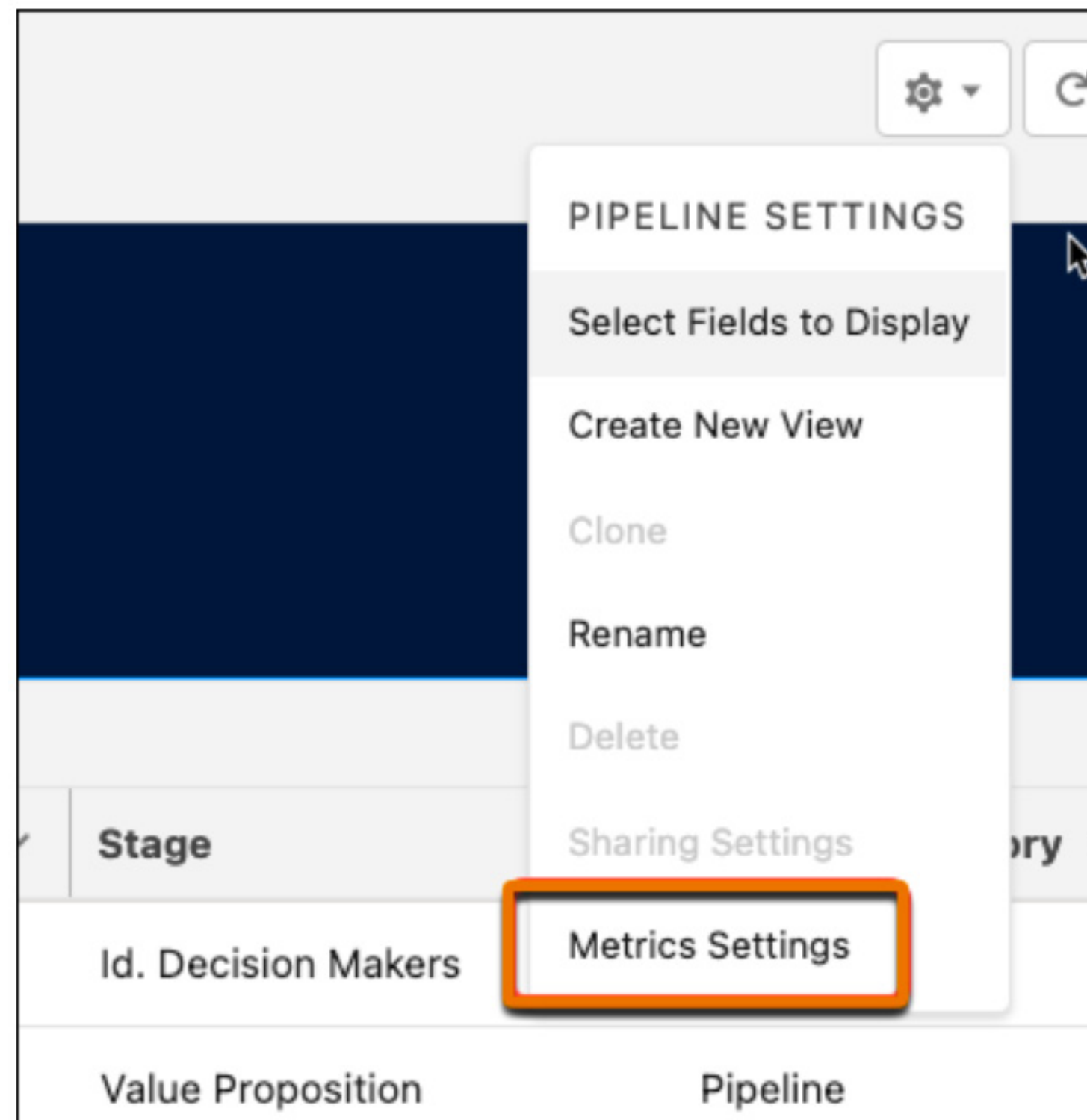
“I’m very happy to see that Salesforce and Slack are really integrated as solutions, as this will help speed up the deal cycles on both internal as well as external collaboration on deals!”

[Read on](#) →

## Sharpen your Pipeline Management

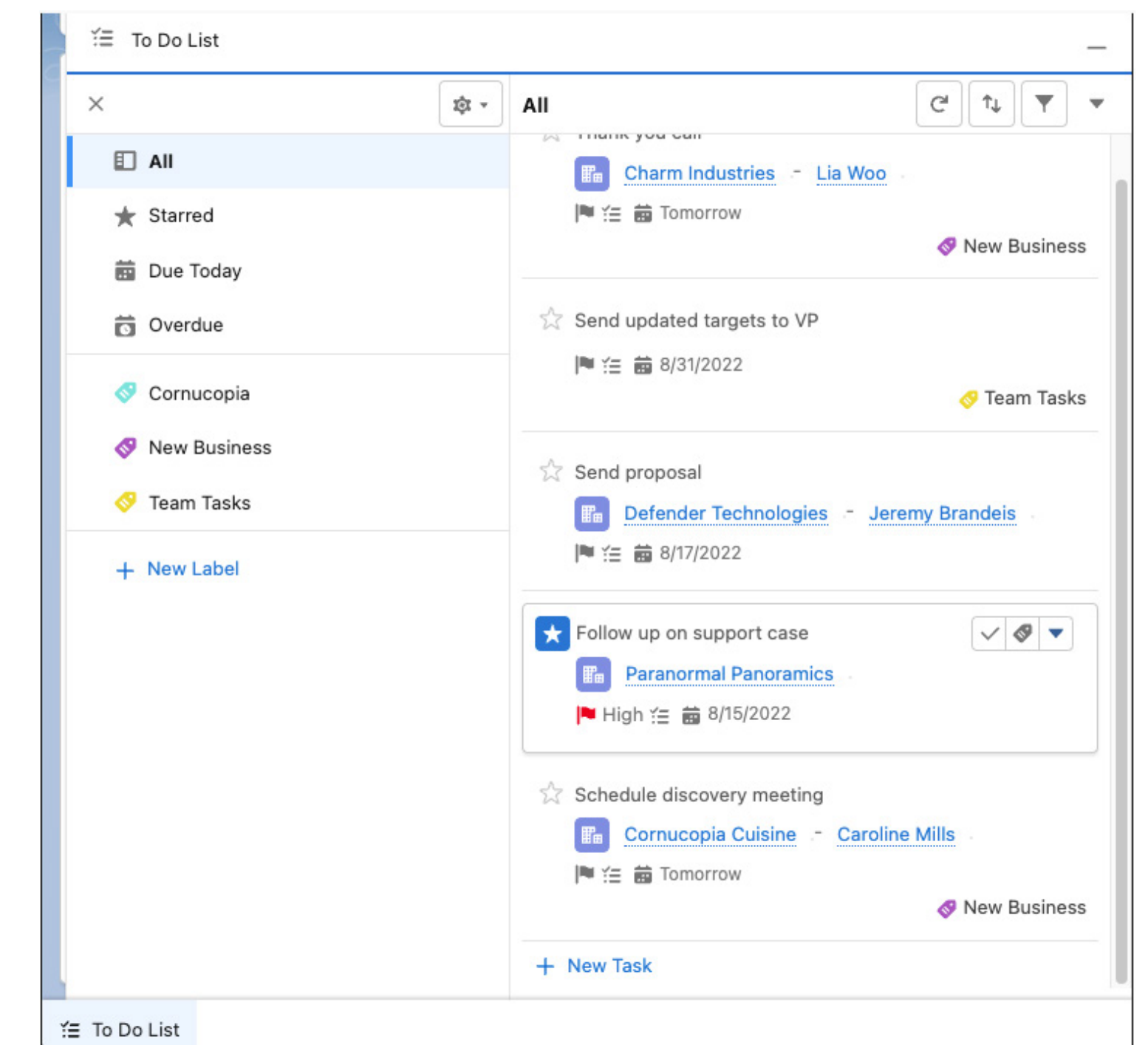
Sales teams always focus on the most critical opportunities and are eager to forecast revenue more accurately. Usually, they want to see the product quantities, repeated monthly revenue, and annual contract values in their pipelines. Pipeline Inspection gives sales teams a solid view of pipeline metrics, opportunities, and week-to-week changes.

Salesforce users can select the field to use for metric total in their Pipeline Inspection views and the Flow Chart. In addition, you can keep deals moving by enabling Einstein Deal insights, Call Recordings, and Emails Insights in Setup. A list view of recent changes to number and currency fields is available to Salesforce users, who can edit the opportunity amount Field Inline in Pipeline Inspection views.



## Organize Your To Do List

Optimize your sales activities by planning and organizing your tasks in the Utility Bar. With this nice improvement in labeling your tasks, you are able to quickly go through the list and prioritize your work. Add this nice feature to a Lightning Experience page and Sales reps can easily use the labels or create new ones.



Read on →



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**“It’s good to see that this release focuses on productivity, to help the sales reps in their administration and reduce the workload for them.”**

## **Collaborate With Slack And Sales Cloud**

Slack is a new way for your entire company to communicate. It replaces emails with something faster, better organized, and more secure. Sales Cloud for Slack enables several kinds of collaboration channels, like internal account teams and external customer contacts and deals channels.

Sales teams access, update and share records, and manage their pipelines by using Slack. Salesforce users can use Notification Builder to get reminders about upcoming close dates, and any changes to stages of the opportunities that you own. This feature facilitates them to update, see and share accounts, contacts, leads, and opportunities directly from Slack!

## **Improve the Global Sales Experience on Your Commerce Platform**

The world is becoming smaller due to advances in technology and transport. Individuals and orgs need to sell their products and services globally. Fortunately, Salesforce releases new features for Global Sales. Use up to a maximum of 25 languages with Multiple Languages in B2C Stores. The seller and consumer can select their desired languages by using this feature.

You can ship products only to the country assigned to the store. This feature is only applicable to B2C.

It is also possible to configure the Salesforce Tax Solution for calculating a store’s taxes. This change applies to B2B Commerce and B2B2C Commerce Enterprise, Unlimited, and Developer Edition.

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**Read on** →

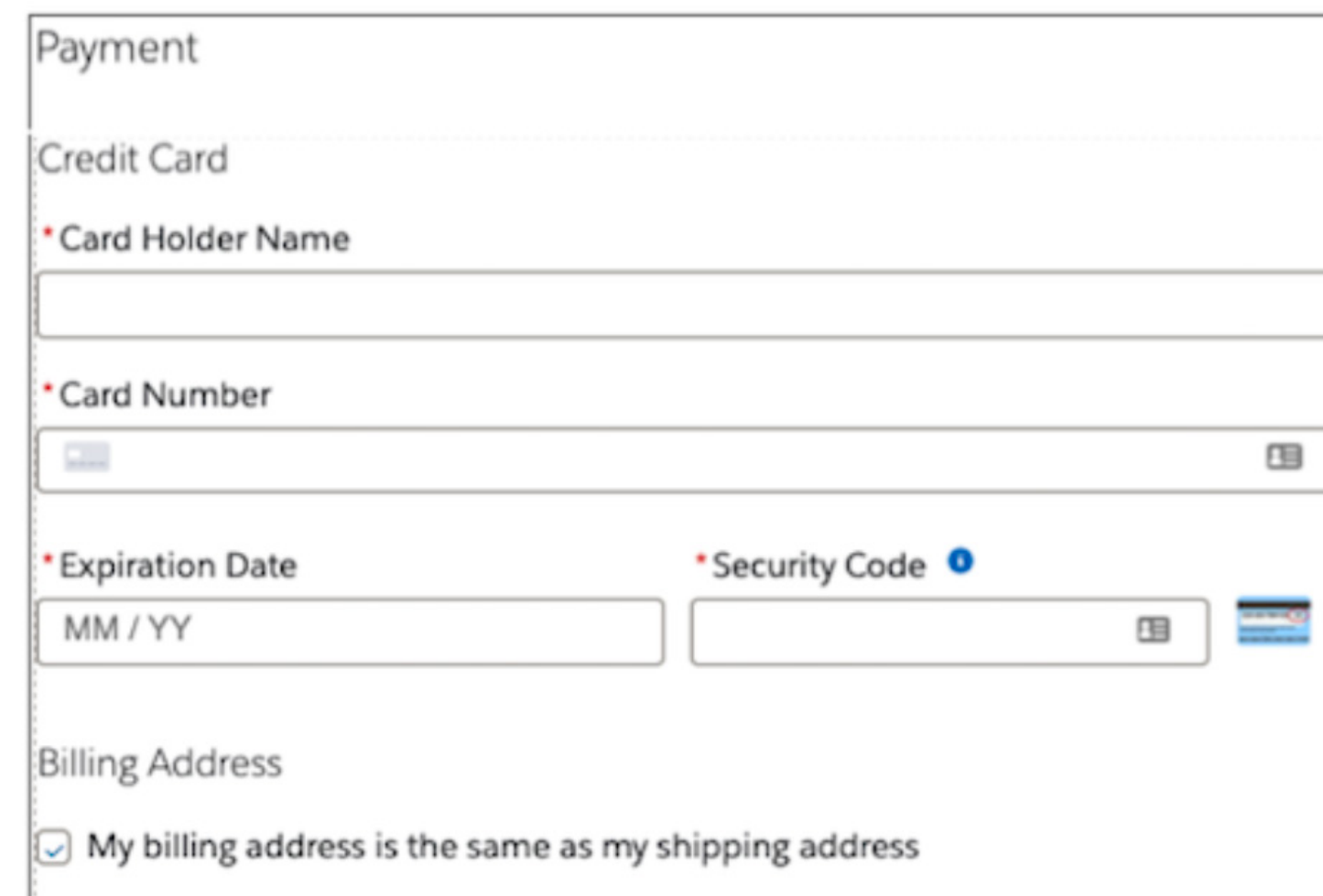
## Salesforce Payments for Your Commerce Platform

Once you hear about payments, the first question that pops up in your head is: Is it secure and not fraud? Salesforce offers a new application that has been integrated with Salesforce B2B2C Commerce and Salesforce Order Management for relieving your stress about fraud and security.

This feature gives shoppers a checkout experience that is secure and easy in selecting the preferred payment method. You can enable this option from Setup by finding the Payments page.

By using a Salesforce payment account (called Merchant Account), you can integrate your Payments with your Commerce Cloud stores, run reports for Stripe accounts, and enable Salesforce Order Management for capturing payments and any issue with refunds.

Salesforce Payments also provides Reports and Charts of your payments where you can view payment activity by date, time, and merchant. On top of that, you can also add Credit Card Payments to your store with only a few clicks.



The screenshot shows a 'Payment' form with the following sections and fields:

- Credit Card**
  - \* Card Holder Name (text input)
  - \* Card Number (text input with a card icon on the right)
  - \* Expiration Date (text input with 'MM / YY' placeholder)
  - \* Security Code (text input with a card icon on the right)
- Billing Address**
  - My billing address is the same as my shipping address

## Improve Your Subscription Management on Revenue Cloud

In this Winter '23 release, Revenue Cloud improves the use of Subscription Management for their customers. The feature is great to provide self-service for subscriptions, manage quote prices, and manage collections. As you know, subscription businesses are collecting recurring revenue from subscription holders for the sake of continuing to provide services and products for specific periods of time, like every month or year. One of the most beneficial advantages of subscription for business is that customers can work together and are able to adjust their subscription on demand, leaving the sales team more time to focus on business development.



**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 now investing heavily in automation with the announcement of MuleSoft RPA. This does not mean MuleSoft is moving away from integration. The introduction of a new runtime, Cloudhub 2.0, and new connectors and accelerators show that.**

## **Chapter topics**

- > Automation, Automation, Automation
- > Cloudhub 2.0
- > New and Improved Connectors
- > Accelerators for Salesforce integration

[Read on](#) →

“Automation is becoming ever more important and is on all organizations’ agendas. With MuleSoft RPA, MuleSoft is adding a platform to automate repetitive, manual tasks.”

[Read on](#) →

## **Automation, Automation, Automation**

We all know MuleSoft from its strong integration capabilities. However, MuleSoft is also investing heavily in automation. After the release of MuleSoft composer earlier this year, MuleSoft is now introducing MuleSoft RPA (Robotic Process Automation). RPA replaces repetitive tasks with bots. With that it can replace manual data retrieval and data entry, document processing, etc., giving way to significant productivity gains and higher accuracy.

A question we often get is how RPA relates to MuleSoft's API Led Connectivity vision, where we provide reusable APIs that can replace manual tasks. In fact, there is enough room for both and both technologies can reinforce each other. For example, think about scenarios where a (legacy) application does not support APIs. In this case, normally, custom development in the application is required. Instead, RPA can be considered for lower costs or a faster time to market. The best thing about all this? It is fully integrated with MuleSoft Anypoint Platform and Composer.

## **Cloudhub 2.0**

MuleSoft has introduced a new version of their renowned runtime: Cloudhub 2.0. Although this remains primarily under the hood, this does provide advantages like a lighter runtime, tighter security controls, and streamlined operations.

## **New and Improved Connectors**

MuleSoft announced some new and improved connectors that help fast-track system integration for both devs and business teams. In this release two especially stand out: the connectors for Salesforce Marketing Cloud (SFMC) and the connector for Salesforce's Pub/Sub API.

The connector for Salesforce Marketing Cloud makes it easier to integrate with SFMC and supports integrating directly with Salesforce Marketing Cloud to begin automating marketing campaigns by scheduling emails or text messages, importing a list of subscribers, or retrieving tracking information.

With the connector for Salesforce's Pub/Sub API, MuleSoft delivers a new connector that harmonizes event-based connections with Salesforce. It was already possible to work with all different events, but with this new connector, there is one, harmonized API that supports all. In addition, this API supports gRPC, which comes with the new and improved event bus on Salesforce.

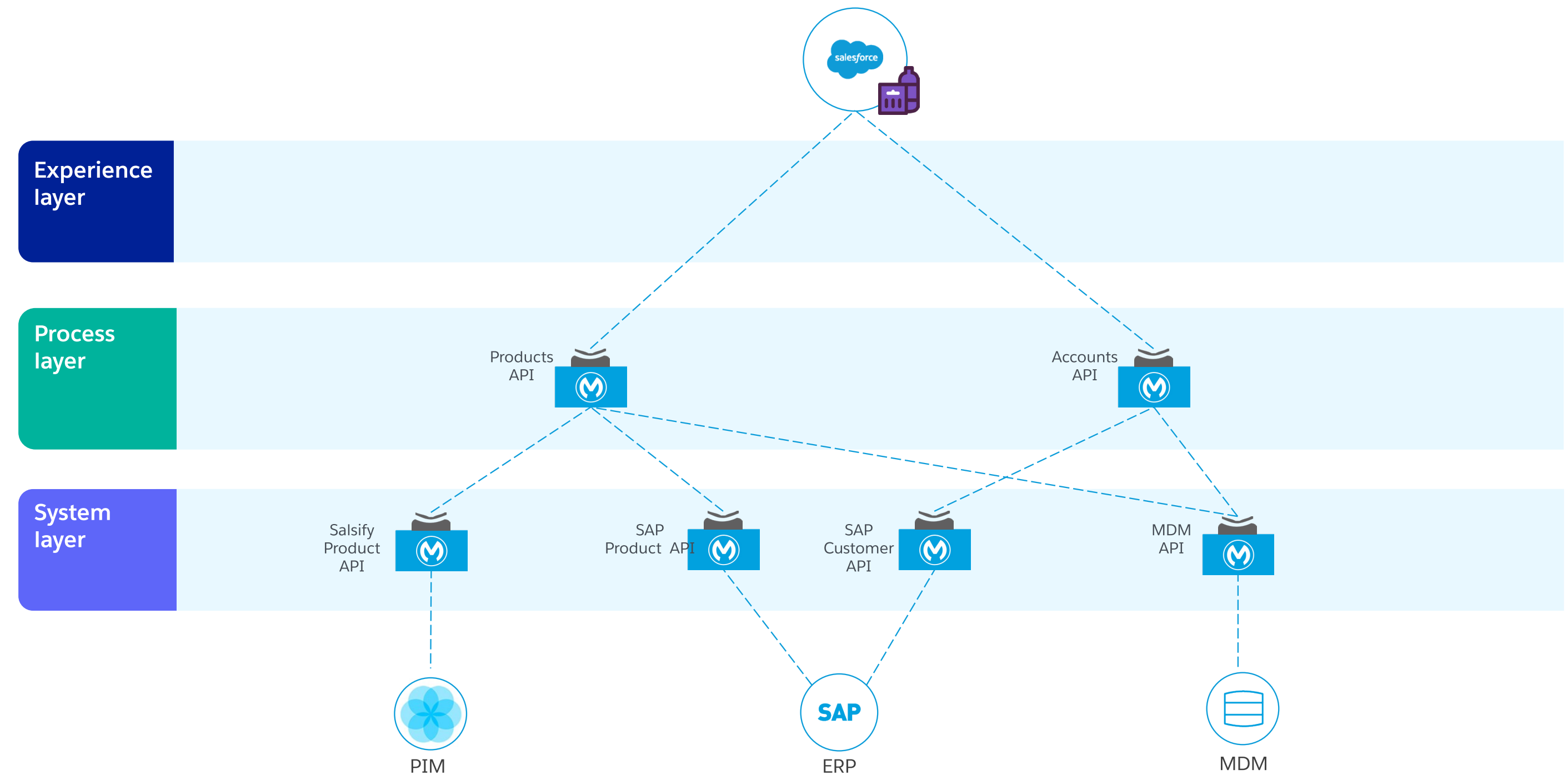
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Read on →

## Accelerators for Salesforce Integration

Next to connectors, accelerators play a key role in achieving faster integration at lower TCO. On this front MuleSoft once again made quite some progress:

- New use cases are introduced for Manufacturing. This includes sales rebate management and the bidirectional sync of customers between SAP S/4 HANA and Salesforce Manufacturing Cloud.
- A new accelerator for Consumer Goods is introduced that focuses on trade promotion management and retail execution. The first release supports Product and Product Hierarchy sync from SAP S/4HANA to Salesforce Consumer Goods Cloud as well as Accounts and Account Hierarchy sync from SAP S/4HANA to Salesforce Consumer Goods Cloud.





**Ernst Jan de Waardt**  
Solution Architect

# Salesforce Platform

**On the Salesforce Platform, this Winter '23 release again shows many small enhancements that will make life easier, starting with the Dynamic Forms on standard objects, which we already had for custom objects.**

Also very nice is the enhanced formula builder in flows. From now on, you can no longer be surprised with issues after saving a Flow you worked hard on and thought would be ok.

From the integration side, one improvement worth mentioning is the filter on CDC, allowing better efficiency and security. Let's dive in!

## Chapter topics

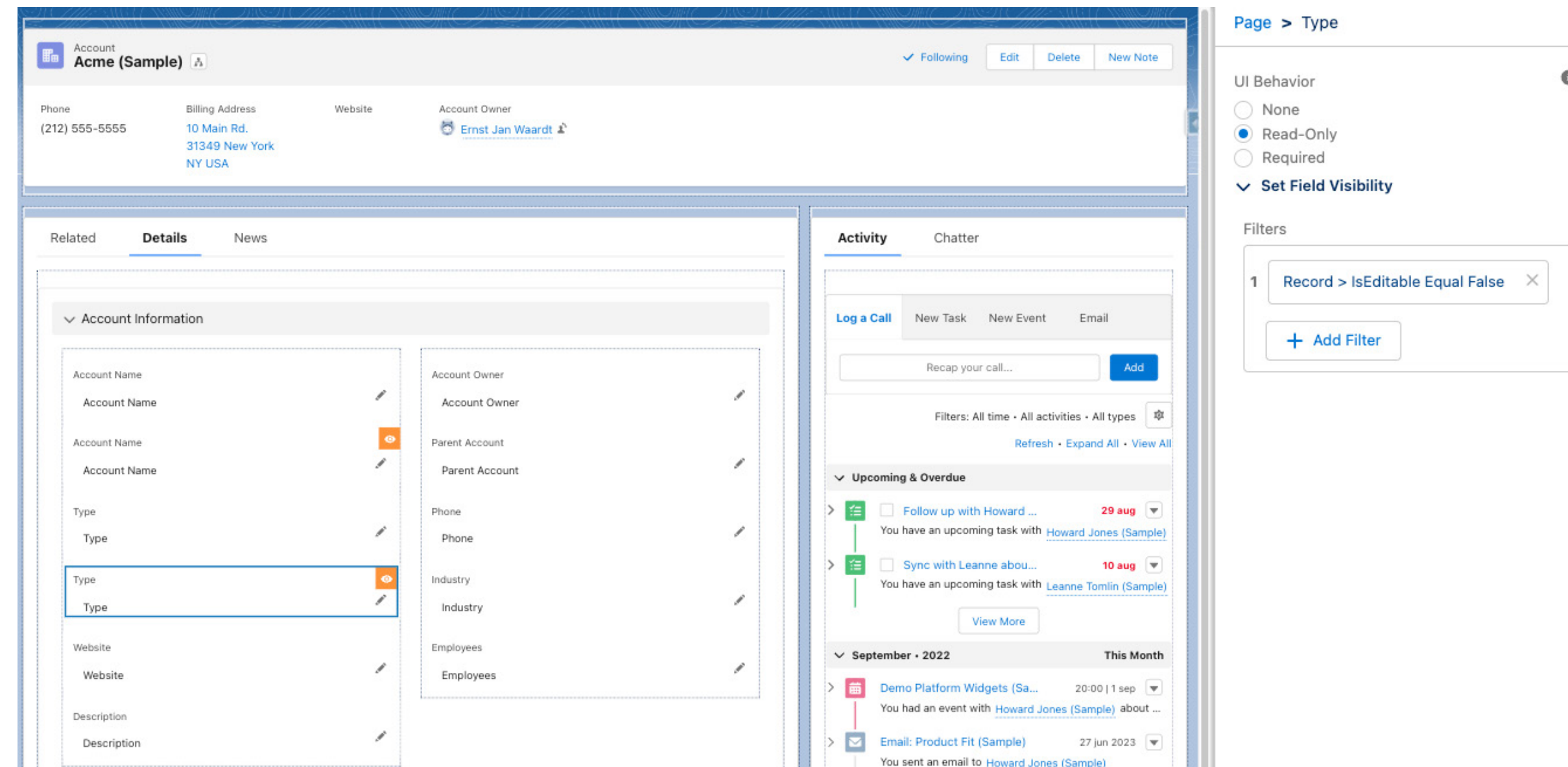
- > Dynamic Forms Available for Standard Objects
- > Automation
- > Enhanced Formula Builder in Flow
- > Integration

[Read on](#) →

## Dynamic Forms Available for Standard Objects

Dynamic forms are now available for more objects including Account, Contact, and Opportunity. Instead of creating many different page layouts and toggling between them based on Record Types, much more dynamics can be achieved using Dynamic Forms.

One example is just making a few fields read-only, based on the status of - say an Account -, where the rest of the fields stay the same. The way to do this is to include the fields twice, once as read-only and once as editable, and conditionally show one or the other. Perhaps it would have been nicer if all this were controlled by a formula. But hey - there should always be something next to improve...



In the example above Account Name and Type are added twice. The selected field Type is read-only with the condition 'IsEditable = False'.

When using this kind of logic make sure to keep it simple. Too much logic can slow things down and make pages complex to maintain. Our strong advice is also to keep business logic in one place. Should some Account fields be editable in Status = Prospect or New? Then don't apply that logic to 5 fields, but create a formula field 'IsEditable' with the logic and use that on the field conditions, Flows, Validations rules, and any other place required.



## Automation

An area we look forward to with each release is the improvements with regard to automation. The first 'improvement' is that it's no longer possible to create new Workflows. Existing ones still run and can be enabled or disabled but this makes it very clear people should migrate existing Workflows asap because maintenance will be very hard if you can not create new ones.

Overall it is worth evaluating current Workflows and Process Builder flows and rebuilding them in Flow, applying the latest best practices instead of just automatically 'converting' them. This way you set good guidelines and improve the maintainability of your org.

### Enhanced Formula Builder in Flow

Formulas in Flows can be very powerful and reduce the need for many process steps in Flows itself, keeping them small and understandable. A big disadvantage so far was that the syntax would only be checked when saving a Flow.

The screenshot shows the 'New Resource' configuration window. The 'Resource Type' is set to 'Formula'. The 'API Name' is 'fx\_MyNewFormula'. The 'Data Type' is 'Text'. The formula field contains 'Len({!\$Record.Name})'. A red error message indicates that the formula result is a Number, which is incompatible with the expected Text data type. The interface includes search and selection tools for resources, functions, and operators, as well as 'Check Syntax', 'Cancel', and 'Done' buttons.

## Integration

Salesforce has many, many ways to integrate data into other systems. Based on the timing, amount of information, and more, one solution is preferred over the other. For (near) real-time interfaces Salesforce offers event-based integrations like Change Data Capture (CDC) or Platform Events.

Nice about CDC is that all fields that are changed on a record are shared in a message. With Platform Events on the other hand you can control exactly when an event should be fired or not (conditions). Now the delivery of CDC has been enhanced so that filters can be added, giving the ability to be more efficient and consume fewer events (which are subject to some important governor limits). Note that Tooling or Metadata API so not from the 'normal' setup pages.

With this release also the Pub/Sub API has become generally available. Pub/Sub is a secure, highly performant, and scalable API based on gRPC. Up until now, it was only possible to use CometD for external applications to subscribe to SF Events.



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# Salesforce Data & Analytics

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**Sharing is caring, is what they must have thought at Salesforce. Sharing options within Slack have further expanded, while a lot of new features can also be spotted at CRM Analytics, a relatively new name. One of these features is already a recipe for success, and in CRM Analytics it is called recipes. Besides enhancements on recipes, we will highlight some new features within Einstein Discovery. Continue reading to learn more.**

## Chapter topics

- > Reports & Dashboards
  - > CRM Analytics for Slack
- > CRM Analytics
  - > Data Integration
  - > Einstein Discovery
- > Snowflake
  - > Snowflake Distributed Data Clean Rooms for Business Growth

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Read on →

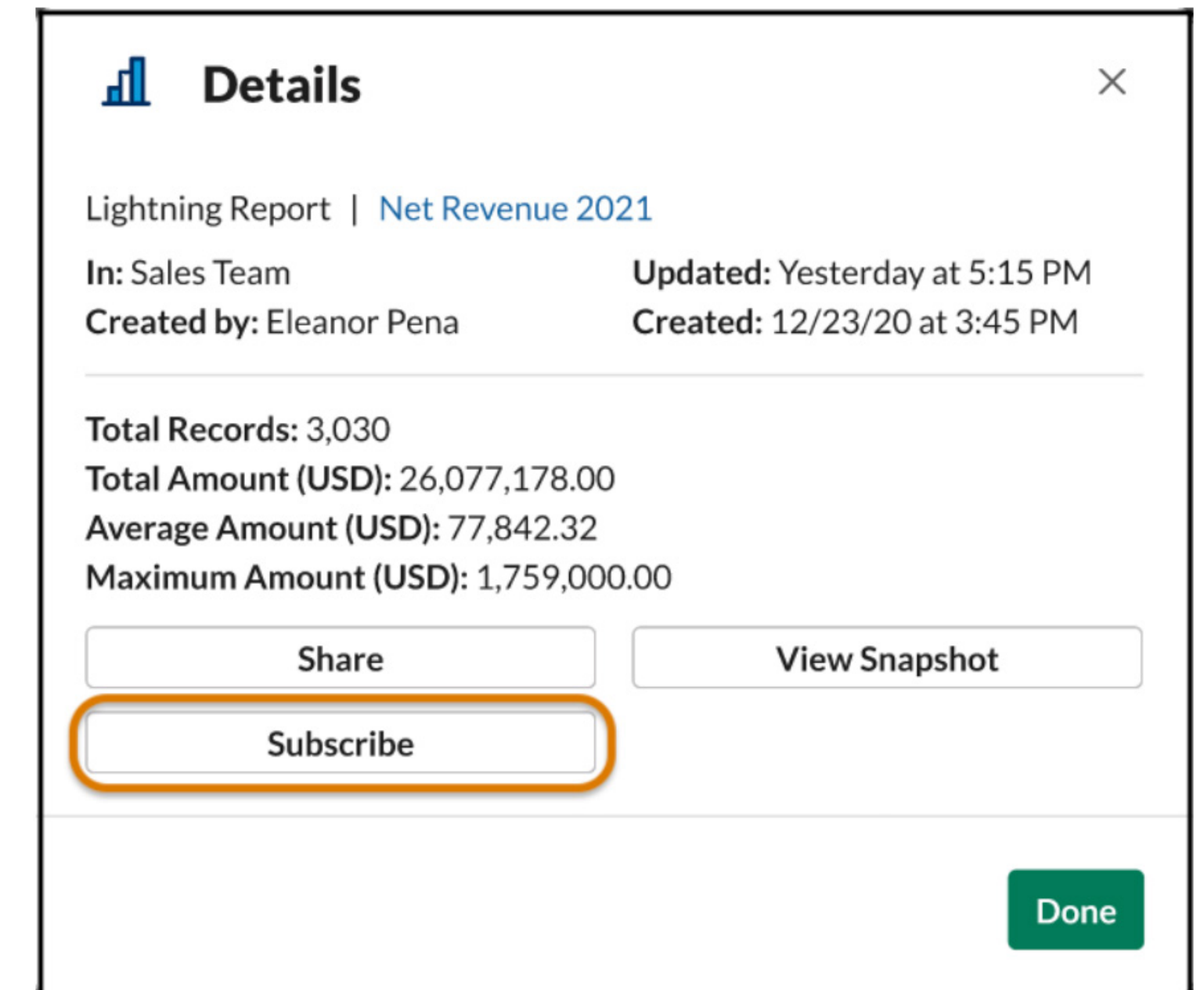
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**“Slack already had great alignment with CRM Analytics, but expanding that alignment with Lightning reports and dashboards allows more Salesforce users to use Slack to find, interact and share their data insights.”**

## CRM Analytics for Slack

There is an app for that, and it is called CRM Analytics for Slack. In this release, Slack is no longer limited to only sharing CRM Analytics items. Salesforce users can now also share regular Salesforce Lightning reports and dashboards in the Slack app, including Einstein Discovery on Lightning reports for sharing predictions and recommendations. All set within the CRM Analytics for Slack app once approved by a workspace admin and installed in Slack.

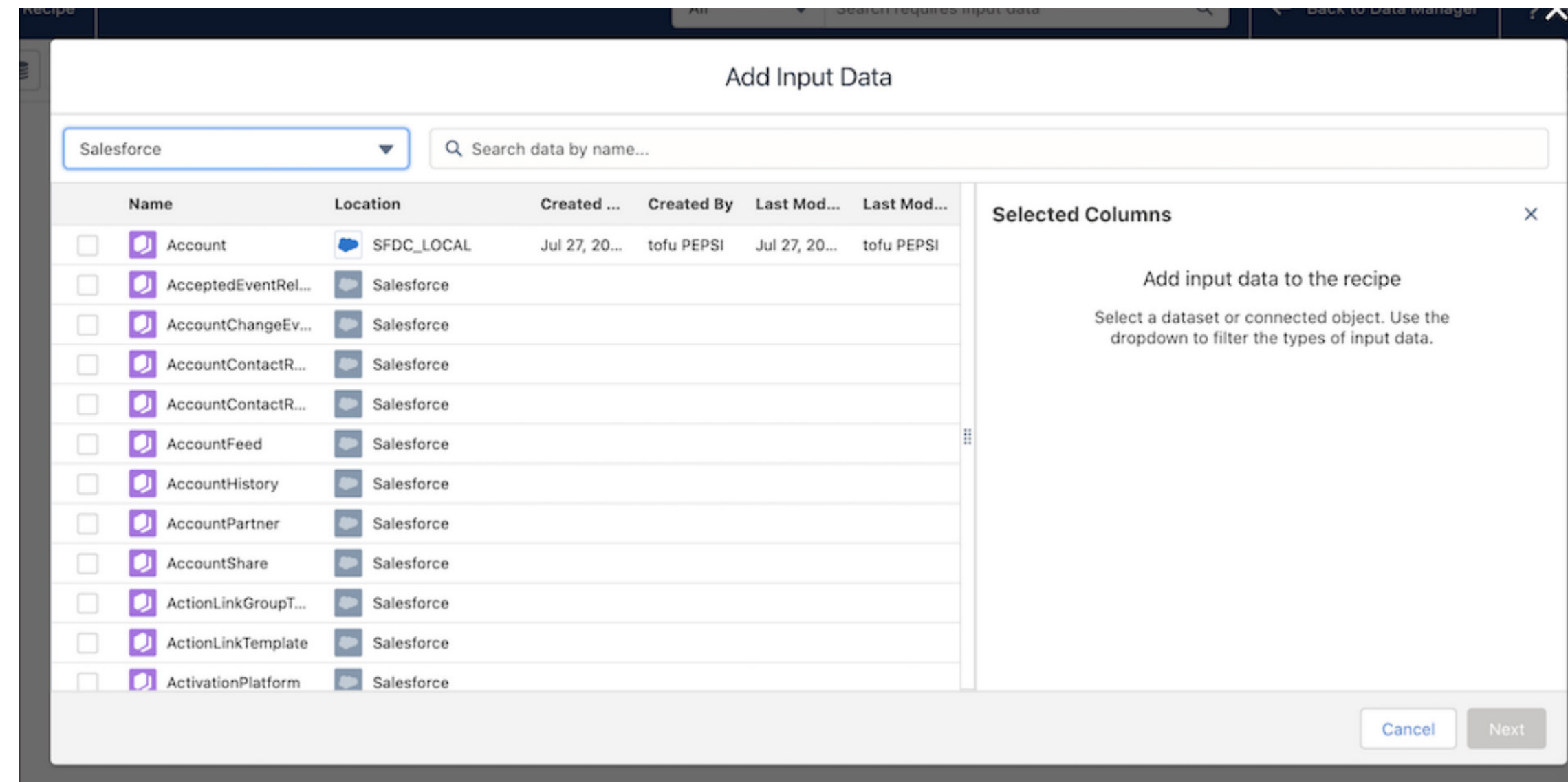
Subscribing to Lightning reports and dashboards that can then be followed in Slack is easily achieved within the Salesforce environment, simply by pushing the 'Subscribe' button in the Details window of a Lightning Report or dashboard within the CRM Analytics for Slack app.



## Data Integration

Two features stand out here, the first one being Data Templates. Instead of focusing on the process of data manipulation, spend your time focusing on the results. Data Templates help you do just that. Prepackaged data manipulation templates run through a wizard for common data manipulation use cases, including data connectors, data prep recipes, and queries, taking away much of the workload.

The second one of the data integration features is the newly added functionality of auto-picking matching columns of Salesforce objects when creating joins in data-prep. Instead of memorizing which columns match between two data sources, recommendations are automatically given. Joins can then be created in just a single step.



## Einstein Discovery

Get familiar with Snowflake, because Einstein Discovery is. Think of any data that is not stored in Salesforce but is kept in a Snowflake cloud database, such as order history or transactions. Running predictions from deployed models with Einstein Discovery can now be done with live data from Snowflake.

As briefly mentioned in the previous chapter, predictions and recommendations can be shared in Slack. How that works: the Run Prediction Action in the CRM Analytics for Slack app gives you a rundown of your report showing a mean prediction score, recommended actions, top predictors, and the three most at-risk records. These can directly be shared in your Slack channels from within the CRM Analytics for Slack app by using the Share button.

Map Model Variables

▼ Link to Supplemental Dataset

⚠ Adding a dataset will use only Salesforce sharing rules. Any sharing rules on the dataset will be ignored

Connected Salesforce Object: Case  
Connected Salesforce Object ID Field: Case ID

Supplemental Dataset: **Snowflake Data**  
Supplemental Dataset Record ID Column: Case ID

10 of 10 Mapped

Model Variable	Object Field	Supplemental Dataset Column
Status	✓ Status	
Case Origin	✓ Case Origin	
Closed	✓ Closed	
Escalated	✓ Escalated	
Count of Feed Item ID	✓	Count of Feed Item ID
Cases.Last Modified Date	✓ Last Modified Date	

Previous Save

## Snowflake Distributed Data Clean Rooms for Business Growth

With the most prominent players in the advertising ecosystem moving away from legacy methods of targeting and measurement - like Apple requiring a user opt-in and Chrome dropping 3rd party cookies by the end of 2023 - it will soon be more difficult for marketers to efficiently target, segment, and measure customer activity. A growing number of Snowflake customers are therefore becoming increasingly interested in the Distributed Data Clean Room solution.

A data clean room is a safe place that allows multiple companies, or divisions of a single company, to bring data together for joint analysis under defined guidelines and restrictions that keep the data secure. With Snowflake, the encrypted data stays fresh and up to date since it exists only in one place instead of being spread across silos. This eliminates the need to move data from one location to another while personally identifiable information is anonymized, processed, and stored in a compliant way.

The most popular use case of data clean rooms is to link anonymized marketing and advertising data from multiple parties for attribution. A company can for example share, with secure functions, its first-party data with its ad partner, who can further analyze the data and improve audience insights without exposing IDs. The same approach also applies to other vertices that deal with sensitive data like healthcare, financial services, government, and telco.

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**"Snowflake's rapidly scalable compute resources combined with the per-second pricing model and vast data cloud, make it the ideal partner to launch a data clean room and with it, continue growing your customer analytics."**

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